

Space Invaders: Social Valuation and the Diversification of Union Organizing Drives, 1961–1999

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Abstract

This paper develops a theory for why “audiences” who have traditionally preferred organizational “candidates” with clearly defined and specialized identities would come to prefer generalists. Such a transformation is demonstrated in the evolution of trade-union organizing in the United States between 1961 and 1999 away from exclusive industrial jurisdictions and toward diverse organizing. While the shift from specialists to generalists has been a puzzle for organizational research, this study proposes that the puzzle stems from a false dichotomy generated by considering categories as ends in and of themselves rather than as the first step in a social process of valuation. When audience members develop new theories about how organizations help them meet specific ends, they change the criteria they use to sort and rank organizations. These new dimensions can be orthogonal to the old ones and thus give the appearance of successful generalists. This study develops an empirical strategy for identifying changes to an audience’s theory of value based on detailed interviews with union organizers and staff who were active during the era of upheaval. It proposes that changes to the role structures that support stable systems of categorization are the starting point for such changes, and that intermediaries that previous work have focused on for identification reasons may have major causal impact on such systems. The theory is corroborated using archival data on organizing drives filed with the National Labor Relations Board over the time period.

It isn't useful to go over the things you can get them in the negotiations... You have to show them that you can get into those negotiations at all. And that means you talk up how you've unionized other groups of employees. [Interviewer: Similar employees, normally?] It helps, but they don't have to be. *When you're selling yourself as an organizer*, it's almost more impressive to say that you've brought in *all kinds of different workers*, because it shows that you can handle a lot of different challenges. [Carlos, a retired union staff member; emphasis added]

1 Introduction

On June 1, 1999, San Francisco bicycle messengers working for the UltraEx courier firm voted to join Local 6 of the International Longshore and Warehouse Union (ILWU). The election—the first won by bike messenger organizers in San Francisco in decades, and the first signed with UltraEx anywhere in more than ten years (Lazarus 2000)—was the fruit of considerable prior work. Bike couriers had formed the San Francisco Bike Messengers Association (SFBMA) in 1990, at a time when couriers' pay, job security and public image were at all-time lows. The SFBMA began largely as a social group, but it brought together couriers from different firms and—particularly through events like the Cycle Messenger World Championships (CMWC), the “Courier Olympics”—different cities. At the 1996 CMWC, held in San Francisco, many of the city's messengers got their first systematic evidence that messengers elsewhere had far better pay and working conditions than they did (Williams 1999). In early 1997 the SFBMA formally declared its activist role as a labor-advocacy group for bike messengers, and in May 1998 it entered a working agreement with the ILWU. The UltraEx victory was the first of several; today the ILWU's Local 6 organizes many of the bike couriers, foot messengers, driving messengers, dispatchers and office workers in the San Francisco area (SFBMA 1998).

Successful union organizing in the United States is rare enough today that the SFBMA's mere formation is anomalous, but there are two other puzzles nested in these events. First, why did the bike couriers affiliate with the ILWU? They had other options. The SFBMA could for example have petitioned the National Labor Relations Board (NLRB) as an inde-

pendent labor union. Couriers could also have affiliated with a different union. Furthermore, the American labor movement—in particular, the AFL-CIO—has had an explicit system of jurisdictions for its member unions since its 1882 beginnings as the AFL, a system that included formal boundaries between types of work and real sanctions for “raiding” other unions’ current or potential membership (Ulman 1955). The ILWU had no strong claim of expertise or history in the courier industries. If anyone did it was the International Brotherhood of Teamsters (IBT), who in 1997 had just won a high-profile, multi-national strike against UPS (Banks & Russo 1999). No one at the SFBMA ever seriously considered the Teamsters, however, and several of its officers even declined to meet with the IBT when the latter made overtures in late 1997.¹

To ask why the couriers chose the ILWU therefore is to ask why industrial jurisdiction had so little influence on the couriers’ decision. Yet San Francisco’s bicycle messengers are not an isolated case: for nearly a quarter-century, American labor organizing has increasingly happened across jurisdictional boundaries. Surveys of contemporary labor organizing often acknowledge this trend and discuss the apparent rise of the “conglomerate union” as distinct from older craft or industrial unions (Lichtenstein 2002, Milkman & Voss 2004). The second puzzle, then, is how American unions have established conglomerate forms rather than remaining specialized by industry. The issue at hand is not why organizations would *try* to specialize or diversify; the reasons for this have been well established in organizational research (Lawrence & Lorsch 1967, Hannan & Freeman 1977, Freeman & Hannan 1983, McPherson 1983, Carroll & Swaminathan 2000). The issue rather is why those who have resources on which the organizations rely would *ratify* such changes. Why would potential members, who long voted for unions that were specialized by industry, instead vote for unions that are diversified?

This is a practical question for scholars of labor and labor organizing, for understanding why workers pick the unions they do may shed light on why workers do or do not choose to

¹Telephone conversation with organizers, 15 May 2008.

unionize at all (Bronfenbrenner 1998). Changes in workers' voting behavior in favor of diverse unions are also particularly salient for organizational and economic sociologists, given the recent literature on how audience behaviors influence candidate identities (Zuckerman 1999, Pólos, Hannan & Carroll 2002, Zuckerman & Rao 2004, Hannan, Pólos & Carroll 2007). The ecological strain of this literature in particular implies that a diverse union should face steep hurdles to legitimacy: “[G]eneralists—those with membership spread over categories—are likely to be judged as having inferior offerings in markets in which specialists can be found in all categories” (Hannan, Pólos & Carroll 2007, p. 109). Thus a union that tries to organize workers in new industries should be less likely to succeed than in its own industry; and if it does succeed, such diversification should make it less appealing to future voters. Yet as shall be demonstrated below, the penalties that unions faced for organizing outside their organizational jurisdictions began to decline in the 1980s, and the penalty that any single union faced for organizing outside of jurisdiction shrank as that union became more diversified. Far from being punished, the “Renaissance Men” (Zuckerman, Kim, Ukanwa & von Rittman 2003) of the labor movement have become more successful than unions that chose to remain specialized.

Theories about audience-candidate interactions have lacked an explanation for why and how an audience that rewarded specialists would change to reward generalists. Zuckerman & Rao (2004) proposed a mechanism by which this change could happen: if categories (like union jurisdictions) are endogenous to some widely held *lay theory of value* that audience members apply when evaluating organizational candidates, then any *change* in that theory of value will likely also change the dimensions along which audience members sort candidates.² I argue that changes to such a lay theory of value, defined here as a *hypothesized connection between an audience's ends and the means that will help them secure those ends*, can explain why potential union members began voting for diversified unions beginning in the early 1980s.

²If the new dimensions used are orthogonal to the old ones, then newly successful candidates will appear diversified along the old criteria.

Zuckerman & Rao's (2004) postulate has never been empirically developed. I develop a theory and approach for testing for a change in an audience's theory of value. I focus on the social structure of this candidate-audience interface, in particular the union organizers who are intermediaries between voters and unions. These organizers introduce new voters to the unions' legitimated jurisdictional categories. By channeling such information and norms (Podolny 2001, White 2002), organizers help reinforce the "circular dynamic [that] governs much of social life" (Zuckerman 1999, p. 1398). I show that union efforts to *restructure* the organizer role after 1982 track closely with voters' becoming more willing to vote for diversified unions. Many unions realized that their older, decentralized style of organizing using industry veterans became ineffective in the face of increased employer opposition, and they created centralized organizing departments that employed professional, often college-educated analysts and staff members who had little experience in potential members' industries. Such organizers could not "sell" their union to new members by emphasizing their experience in the industry as past organizers had done (Ulman 1955, Dunlop 1958, Craft 1991) but they *could* emphasize their experience breaking into *new* industries. This new justification resonated with voters because the latter group now found winning recognition from employers more difficult and therefore valued candidate unions first on their ability to win employer recognition and only secondarily on their contract-bargaining ability. This changed theory of value privileged diversified unions. The key theoretical insight stemming from this finding is that the sort of "market intermediaries" that previous studies have relied on largely to *identify* classification (Zuckerman 1999, Hsu 2006) can have their own *causal* role in reinforcing *or transforming* social systems of categorization.

Documenting a change in valuation requires extended longitudinal data to demonstrate how a theory of value worked in the past and how it changed. I address this by analyzing data covering all organizing drives that filed representation-election petitions with the NLRB between 1961 and 1999, capturing decades on either side of the theorized change. Such a change to a lay theory of value cannot be inferred from changes in specialization alone because such

changes could reflect audiences’ applying the same theory of value to changed economic fundamentals. I therefore combine the quantitative analysis with interviews with union staff and organizers who were active throughout the period to identify changes in their *justifications* for applying categories (Abbott 1988, Ridgeway & Correll 2006, Zuckerman 2008, Kahl 2008), which help directly identify changes in valuation.³ I demonstrate that the decreasing penalties associated with industrial diversification after the early 1980s cannot be explained by the simple collapse of jurisdiction, as a theory that focuses only on the “supply” of unionization would predict. While the penalties associated with organizing outside traditional jurisdictions decreased after the early 1980s, only unions that *also* restructured their organizing *benefited* from diversification, implying that the structure of “demand” for unions also mattered. Furthermore, the adoption of such reforms involved a feedback loop: unions that centralized and professionalized their organizing experienced greater benefits from doing so as more unions adopted the reforms. Such unions, diversifying across industries, should not be thought of as mere “space invaders,” as they would both in the old jurisdictional system and in a competitive free-for-all, but rather as specialists of a new kind, one in which audiences, still looking for ways to distinguish and use organizations, see value.

2 The rise and fall of industrial jurisdiction

The American labor movement since 1960 has four features that recommend it as a site for investigating a shift in audience members’ theory of value. First, the unions operated within a strong categorical system based on the AFL-CIO’s principle of exclusive jurisdiction. Second, organizing activity, mergers and voter behavior largely conformed to those jurisdictions in the 1960s and 1970s. In that period the labor movement resembled other contexts in which

³28 semi-structured interviews were conducted with union organizers and staff members. Of these, 10 had been active prior to 1980, 11 had been active since the early 1980s and seven were active across both periods. All of the older organizers were male, reflecting unionization patterns in that period; two of the intermediate and four of the newer organizers were female. Interviews lasted an average of 45 minutes and were usually recorded. The quotations presented here are not used to prove hypotheses but to suggest the mechanisms by which the theory operates and to give meaning to the quantitative findings (Jick 1979).

researchers have found a relationship between conforming to a category and performance, such as venture capital (Wu & Dokko 2007) and feature films (Zuckerman et al. 2003). Third, beginning in the 1980s, that conformity broke down: unions increasingly tried to enroll workers across more industries, mergers united unions in less-and-less related industries and voters became more likely to vote for unions that branched out. Fourth, despite environmental changes that would encourage *all* unions to diversify their membership, unions' success at doing so has been quite uneven. Industrial-relations research into changes in the unions' jurisdictions (Chaison & Dhavale 1990*a*, Chaison & Dhavale 1990*b*, Dunlop 1988) describes the rise of "conglomerate unions" but offers little theory to explain the phenomenon or to predict why some unions would be more inclined to take on conglomerate forms than others. This section describes briefly the AFL-CIO's jurisdiction system and the changes that system underwent during labor's "time of troubles" (Lichtenstein 2002, p. 212) in the late 1970s and early 1980s.

Organizing since the 1950s has officially taken place under the AFL-CIO's principle of exclusive jurisdiction. The logic of unionization is to limit competition among employees regarding the terms of employment (Commons 1909). Setting up an exclusive jurisdiction for each union, which would formally eliminate competition from other unions, was the obvious way to promote this goal.⁴ The use of the term "raids" to describe organizing attempts within another union's jurisdiction reflects the normative value placed on this division of labor. Thus for example the original constitution of the American Federation of Labor, adopted in 1882, reads that

No charter shall be granted by the [AFL] to any National, International, Trade, or Federal Labor Union without a positive and clear definition of the trade jurisdiction claimed by the applicant, and *the charter shall not be granted if the*

⁴There has been some dissent, particularly within academia, over whether monolithic representation is indeed the optimal structure (Freeman & Medoff 1984, Stepan-Norris & Zeitlin 2003). Such dissenters frequently note that the periods of greatest trade union growth have also been periods of trade union competition, as between the AFL and the CIO in the 1930s. This criticism may be correct, yet the norm of jurisdiction has been widespread. Even in when unions competed for members, almost never have any of the competitors expressed overlapping jurisdiction as a goal. Rather, multiple unions' operating in each industry was the *de facto* state of affairs while each union tried to establish unity under its control (Zeiger 1995).

jurisdiction claimed is a trespass on the jurisdiction of existing affiliated unions, without the written consent of such unions. . . (Article IX, §II; emphasis added)

Mutual respect for jurisdictions could in principle be secured through a network of bilateral agreements, but in practice unions have instead affiliated to confederations that have formal no-raiding agreements (Ulman 1955). Most of the unions studied here are or have been members of the AFL-CIO, which was formed in 1955 in large part to end jurisdictional battles.

Union organizing largely conformed to those the AFL-CIO categories; jurisdiction shaped the day-to-day interaction of current and potential union members in ways that reproduced the boundaries between unions and industries.

This pattern of organizing began to break down after about 1980. The exact start date of the trade-union collapse has long been debated (Kochan, Katz & McKersie 1986, Goldfield 1987, Farber & Western 2000, Lichtenstein 2002, Fantasia & Voss 2004) because so many potentially critical events occurred between 1977 and 1984. Because this study focuses on changes to organizing, the near-total collapse in union organizing during the deep 1982 recession, shown in figure 1, is a useful break point. Having averaged about 7,000 drives per year for nearly two decades, organizing fell by 90 percent in 1982. Activity rebounded the following year but only to about half the old level. Part of this decline represented increased selection by union organizers—as the win rate shows, the share of *successful* drives rose in this period—but, since unions had long struggled just to organize enough new members to offset attrition, the lower post-1982 organizing rates began a sharp and sustained decline in union density.

[Figure 1 about here.]

Union organizing also grew more diverse across industries after 1982. This paper measures the diversification of unions' organizing across industries using a Hirschmann-Herfindahl index (HHI) where shares are the portions of a union's organizing activity in each three-digit

SIC industry. The index is weighted to account for the relatedness of different three-digit industries.⁵ On this measure, a value of one indicates complete concentration of a union's organizing activity in a single three-digit industry. Organizing in additional industries or spreading one's organizing more evenly across industries will lower the score. Figure 2 plots this measure of diversity over time for the AFL-CIO as a whole and for selected unions. Before 1982 industrial concentration among AFL-CIO unions' organizing was relatively high; the ILWU, which was outside the federation until 1988, is plotted for contrast. Concentration within the federation was also comparable for different unions.⁶ After 1982 the average diversity of organizing by AFL-CIO unions increased; no comparable change occurred in unaffiliated organizing. Furthermore the AFL-CIO unions' activities resemble each other less after 1982. The Carpenters (UBC) diversified but no more than the federation average, the Painters (PAT) stayed at their previous levels and the Auto Workers (UAW) diversified such that, by century's end, they more resembled the once-unaffiliated ILWU than they did the federation.

[Figure 2 about here.]

In the past, such diversification of organizing would have led to lower win rates for the diversifying union. Figure 3 however reports the estimated effect of increasing a union's organizing diversity on the probability that the union would win a representation election. The penalty that was present in the 1960s and 1970s disappears in the 1980s and, increasingly, becomes a benefit. It is this shift *away* from industrial specialization, both by the unions who launched organizing drives and by the employees who ratified those efforts, that this study seeks to understand.

[Figure 3 about here.]

⁵As for example industry 344 (Fabricated Structural Metal Products) is more related to industry 346 (Metal Forgings and Stampings) than it is to industry 783 (Motion Picture Theaters). Calculation of these weights and the index is described in the data and variables section below.

⁶The AFL-CIO includes craft unions that organize across industries. Thus the AFL-CIO average slightly *understates* the industrial unions' concentration.

3 Explaining generalists

Unions can *attempt* to diversify whenever they want and they had motivation to do so after 1982. Diverse organizing will only produce a diverse union, though, if the workers vote for it. Why might audiences shift their preferences from specialists to generalists? Three strands of recent sociological theory investigate such interactions, focusing respectively on cognitive categorization (Hannan, Pólos & Carroll 2007), power (Fligstein 2001) and the social process of valuation (Zuckerman 2004, Zuckerman & Rao 2004). I do not recapitulate all three strands here (Lounsbury & Rao (2004) and Zuckerman (2008) review much of the supporting research). Instead I note that while in principle these theories explain both specialization and diversification, their predictions and empirics have been devoted to the constraining effects of categories and the reinforcement of specialists (but see Zuckerman et al. (2003) on Renaissance Men and Peterson (1997) on “breaking out” in country music). I therefore sketch what each theory implies would be necessary for the spread of generalists. Cognitive theories do not problematize shifts in audience behavior. Theories of power offer a mechanism for forming preferences but not for changing them. Social valuation suggests a way for preferences to change but lacks mechanisms and empirical support. I develop the pieces of the latter that have been lacking.

3.1 Cognitive categorization

Early organizational niche theory (Freeman & Hannan 1983) stipulated many of the environmental conditions that would encourage organizations to specialize or diversify. That work emphasized producer actions, considering for example the impact of producer density (Hannan & Freeman 1987, Carroll & Swaminathan 1991) or age (Carroll & Hannan 2000, Carroll & Huo 1988) on vital rates within the producer population. These studies only vaguely described the impact of consumers’ tastes and preferences, subsuming individual effects within environmental variables such as fine- or coarse-grained demand. This made

analyzing the switch between specialist and generalist organizations impossible except in trivial instances:

We posited [in Pólos, Hannan & Carroll (2002)] that...code violations [by organizations operating across categories rather than specializing] generate devaluation by relevant actors, and that identities build on such codes. Yet we did not identify the agents who do the codification. This kind of “passive-voice” construction, which characterizes much institutional sociology, makes it very difficult to explain change in institutional arrangements, including social codes, except by reference to exogenous shocks. (Hannan, Pólos & Carroll 2007, p. 31)

Recent ecological theory has therefore incorporated the actions of audiences directly. I refer to this work as “cognitive categorization” because it begins with the assumption that actors look for distinctions and similarities to make sense of a complex reality: “Members of audiences observe producers and products, notice similarities [and] try to make sense of them by clustering similar producers/products” (Hannan, Pólos & Carroll 2007, p. 33). Such clustering is not arbitrary; audience members have an interest and some sort of “relevance criterion” that is useful “for sorting potential members of the domain given by their interest” (Ibid., p. 38). Because audience members prefer clear satisfaction of such criteria,

“An important issue arises when a producer possesses more than one high-degree category membership...psychological research reveals a strong tendency for persons to ignore all but the strongest membership when pressed to make inferences...about feature values (Murphy 2002, p. 257–264; Verde, Murphy and Ross 2005)” (Ibid., p. 107)

From these assumptions it follows that “Membership in multiple (nonnested) categories likely confuses the audience and makes a producer appear to fit poorly to any of the schemata that an agent applies to the categories” (Ibid., p. 108) and that generalists will suffer relative to specialists. Audience members’ preferences for clear identities will aggregate to encouragement for organizational specialization along clear lines. In the case at hand, potential union members value the distinctness of a union that represents workers solely in their industry and are confused by a union that has membership in multiple unrelated industries. Members then vote for specialist unions and reinforce the existing industrial

boundaries.

Why though would voters ever prefer diversified unions to specialized ones? The puzzle is *not* the existence of diversified unions amid a population of specialists. Ecological theories have always assumed variation within organizational populations as in biological ones (Hannan & Freeman 1977). The question rather is how specialists could *become* diversified given the audience's theorized inclination for clear identities. By focusing on that inclination, recent ecological theory seems to contradict older ecological theory: unions might want to diversify, but workers seem to have no reason to go along with the change. This contradiction is particularly troubling *because* the theory's assumptions are quite reasonable.

The most straightforward way to resolve this conflict is to focus on changes to the audience's *relevance criterion*. Cognitive categorization does not problematize why particular audiences find particular criteria relevant for sorting organizational candidates; instead it takes such criteria as postulated and elaborates the mechanisms through which audiences' applying criteria could produce organizational populations specialized along those criteria. For understanding changes in category systems, though, it is at least as important to understand why audience members choose to categorize in the ways they do. Why for example would potential union members value unions that were specialized by industry, rather than by some other dimension?

3.2 Categories as artifacts of power

The null, that members do *not* value such specialization *per se*, is worth considering. People might never internalize a category system and yet be constrained by it. Bicycle messengers in the 1970s for example might have wanted to join a union other than the IBT but been unable to, either because the AFL-CIO prevented other unions from launching organizing drives among couriers or because the couriers realized that affiliating with a maverick would bring more costs than benefits. As the federation's strength declined after 1980 it became less able to punish member unions' violations of one another's territories. The breakdown

of a well-ordered jurisdiction scheme could be regarded as evidence that the scheme did not “really” reflect audience members’ perceptions but merely constrained their actions. Such a purely political explanation of jurisdiction’s collapse requires no particular behaviors from potential members. Changes to the unions and their federation alone could explain the diversification observed.

Power and political compromise certainly played a role in the construction of the AFL-CIO’s jurisdictions. The AFL and CIO unions that merged in 1955 relied on different claims to jurisdiction, one based on the type of work performed and the other on the industry in which the work was done. Thus “craft” unions organized among tradesmen across industries while “industrial” unions organized across trades in single industries. These claims were internally coherent but incommensurate (Espeland & Stevens 1998) in that they offered no guidance from first principles for choosing between them. The boundaries recognized at the merger left many potential jurisdictional overlaps in place; consider the multiple unions organizing in the electrical industry (Schatz 1988). The unions were also not hesitant to call on the federation to sanction member unions that violated jurisdiction (Herding 1972). Some degree of enforcement was necessary to preserve the system.

The federation’s power also declined after 1982. Yet politics alone cannot explain subsequent developments. Incommensurate boundaries are neither unique to trade unions nor useless to audiences. Virtually all categorization systems rely on an *a priori* choice about the relevant dimensions upon which to classify objects, as for example between *terroir* and grape varietal in French and Californian wines (Douglas 1986). Any such simplification will leave some candidates fitting neatly into *no* category, and yet audience members can still find the simplification useful when considering *most* candidates (Zuckerman 2003). Furthermore, if industrial jurisdiction were solely an artifact of power within the AFL-CIO, then any decline in that power can only explain why diversifying unions would face weaker penalties. It cannot explain why some unions would *benefit* from diversifying.

Theories of power do however offer an explanation for why audiences might develop

particular relevance criterion—the unposed question in the ecological explanation. Because “Success itself gives... people the authority to define what rational behavior is” and “Economic power also goes hand in hand with the political power to determine public policies that shape how people see their interests and how they can behave” (Dobbin 2004, p. 6), categories could be best understood as artifacts of past power struggles that serve the interests of the winners, not necessarily the interests of those applying the categories. Union voters might therefore value clear industrial jurisdictions not because they are efficient but because people prefer to ascribe functions to institutions that were created partly by force. Such a theory, based on power, is potentially very useful for explaining voters’ reluctance to vote for unions that organized beyond their jurisdictions in the decades before 1980. In so doing, it suggests one way that a relevance criterion could emerge among an audience and thus meshes conceptually with the cognitive processes of categorization described above.

Where such a theory is less helpful is in explaining why a relevance criterion would *change*. If actors rationalize the exercise of power as efficient, then the exercise of power need not be constant (Weber 1968). By the same logic, though, diminution in the AFL-CIO’s exercise of power should not proportionately reduce the authority of the union’s jurisdictions. Dobbin & Sutton (1998, p. 443), discussing the spread of diversity offices within firms, noted that “employers continued to adopt these offices even after Reagan curtailed enforcement of the laws that had popularized them.” Why, in the same time period, did union voters *not* continue to respect jurisdiction, even as unions and the AFL-CIO’s power to enforce them shrank?

3.3 Categories as tools for valuation

Explanations that draw on cognitive categorization or power both therefore want for a theory of why audience members shift the criteria by which they classify organizations. I build on Zuckerman’s (2004, p. 410) insight that “classification is the necessary first step in the valuation process” to argue that audiences use categories to map candidates onto a

reduced set of features that in some way provide the means for audiences to achieve their ends. Making candidates commensurate (Espeland & Stevens 1998) in this way then enables audiences to rank them on their ability to secure ends, whether those ends are making money buying securities (Zuckerman 1999), saving for retirement in a mutual fund (Zuckerman & Rao 2004) upgrading office equipment (Kennedy 2008) or going out for a classy dinner (Rao, Monin & Durand 2005). The categorization scheme used is not arbitrary; audience members think it helps them. Yet the means do not always meet the ends: if classification is a first step in valuation, then audiences should sometimes change their valuation schemes and thus their categories when they observe a disconnect between the two things—when their theory of value appears to be flawed (Zuckerman & Rao 2004, p. 173). It is such a recognition by potential union members—that unions with deep experience in their industry had become increasingly unable to win recognition and thus could not deploy their formidable contract-bargaining abilities—that is proposed to drive the changes observed in this study.

If classification is part of the process of valuation, then the fact that categories are “typically crude cuts through a highly nuanced and dimensionalized array of phenomena” (Zuckerman 2003, p. 2) takes on particular significance for explaining the appearance of generalists. For if classification schemes apply lay theories of value, then presumably the reduced feature set on which the classification scheme focuses was chosen for its ability to distinguish candidates along that theory of value. A new theory of value may imply a new criterion and a new ranking. A shift from specialized unions to diversified ones therefore need not happen because of any change in voters’ preferences toward generalism. Rather, evidence that diversified unions outperform specialized ones may be evidence that voters have begun to value something else about unions, something on which the seemingly diversified union is in fact specialized.

If theories of cognitive categorization suggest the *need* for a relevance criterion and if theories of power suggest one way that such a criterion might *emerge*, then theories of social valuation suggest a way that relevance criteria might *change*. Because they can be tested

against performance and found wanting, lay theories of value offer rationales for changing classification systems and thus offer an escape from the reification of categories that theories of power might predict. At the same time, those theories imply specific changes in the focus of specialization and thus still provide a mechanism by which relevance criteria could change. The approach occupies a useful theoretical middle ground but it has serious empirical shortcomings: while Zuckerman & Rao (2004, p. 209) showed evidence that classificatory schemes and codes “may be considerably more fluid than is commonly assumed,” they acknowledged that the onus lay on future research to document and explain how such a change in audiences’ theory of value might take place: “rather than simply assuming them as hard constraints, our results call for research into the process by which old theories of valuation are overturned and new ones emerge and, in what circumstances, such dynamics crystallize into relatively stable interpretive schemes that constrain strategy.”

4 Identifying change to a theory of value

This study uses the breakdown of industrial jurisdiction and the shift in performance of specialized and diversified unions to document how potential members’ theory of value changed: how they identified a new theory by which joining trade unions served their ends and how they applied that theory to subsequent organizing drives. The approach used here has three elements. First, it stipulates that, if category schemes apply theories of value, then actors should cite that theory of value to justify applying the scheme (Kahl 2008, Zuckerman 2008). This implies that changes to their theory will change their justifications. Second, because category schemes are reinforced by stable role structures that channel information and norms (Hsu 2006, Podolny 2001, Zuckerman 1999), changes to a theory of value should be associated with changes to those roles.⁷ Third, these new justifications and roles should produce

⁷A mere association is posited rather than causation because, as is explained in the case, the process is more complicated. Unions began to change their organizing structures because they realized that their drives were failing too often. Voters identified an advantage in such reorganized unions; their voting for such unions encouraged other unions to make similar changes. The new order emerged from such interactions

structural changes in the organizations involved. The spread of such changes should therefore predict different effects of classification. Below I describe each element's presence in union organizing during labor's period of crisis. I then draw several hypotheses that can be tested on the historical data.

4.1 Justification of industrial jurisdiction

The AFL-CIO's industrial jurisdiction scheme had explicit justifications. The dispute between craft and industrial jurisdictions (See Dunlop (1958) for an overview) reflected a dispute over the role of industrial specialization in helping workers get the best possible contracts. Yet while craft and industrial unionism assumed different sources of power, their means for securing it—high density within their chosen jurisdictions—were the same. For industrial unions in particular, high density within industries was a necessary prerequisite for building countervailing power against employers in negotiations.

Such a scheme for carving up the economy always produced some awkward cases that straddled accepted boundaries. These overlaps are useful here because they forced unions to justify why a line of work or group of workers should be in their jurisdiction and thus surfaced why they valued a given categorization scheme. Technological change for example often gave unions a chance to stake their claims anew. In the early 1960s, members of the International Association of Machinists (IAM), the IUE and the UAW⁸ argued before a federal Walsh-Healy panel⁹ the proper classification for missile production. Each union mentioned details of the production process that gave it claim on the workers involved.¹⁰ None used these

rather than solely from one side's strategic behavior.

⁸Whose full name includes "Aerospace Workers."

⁹The Walsh-Healy Public Contracts Act of 1936 stipulated standards for pay and hours of workers engaged on federal-government contracts. The Act states that workers should be paid at least the "prevailing minimum wage" in an industry or locality. Because in many industries production for the government and for civilian use happened side-by-side, the government's wage determinations also set a *de facto* floor under wages for civilian work. The Department of Labor convened panels to investigate and rule on wages in several industries.

¹⁰"Walsh-Healey Hearings, Electronic Equipment industry—Statement of IAM and UAW in support of its proposed definition of Aircraft-Guided Missile Industry," 1959; UAW Research Department Collection, maintained by Wayne State University; Part 1 Box 64 Folder 6.

claims as the sole basis for their jurisdiction, though. Instead they discussed the relative power that would aggregate to employers and employees in the industry from each possible determination. Thus the UAW acknowledged the machined and electrical aspects of missiles but argued that its established base among the defense companies' assembly workers would allow it easily to enfold missile-production workers into existing contracts with favorable terms.¹¹ The government echoed the UAW's argument when it ruled for aircraft builders as the comparison group for setting wages in the industry (Staff 1959). Disputes like this one did not challenge the jurisdiction system but instead fitted anomalous cases into the system's categories. Such "tests" (Boltanski & Chiapello 2006), far from undermining the system, instead lent authority to jurisdictions by taking their existence for granted and involving external actors like the state in justifying their boundaries.

Union members also considered the contract-bargaining ability of different unions, which was related to their industrial density, in making their decisions. Routine social contact with union members, often in one's own industry, made the choice of which union to affiliate with seem obvious, and yet social ties in and of themselves were insufficient for picking a union. Contract bargaining still mattered:

Interviewer: What if you worked in an auto-parts plant, and your uncle worked in a furniture plant? Would you join the Furniture Workers?

Paul [former industrial unionist]:¹² Sometimes. I think some unions used to get members that way. *But it wasn't the norm.* I think, back then, it was more likely he'd tell you to get in touch with the Auto Workers, or maybe the Machinists, because *they'd be the ones that could get you a good contract.* [Emphasis added]

This quotation illustrates both the general applicability of the older jurisdiction system (both employees and their contacts understood the connection between a union's specialization and its ability to secure value in the form of a contract) and the devil in the details

¹¹Testimony by Leonard Woodcock, UAW, to the Walsh-Healey Hearings on the Aircraft-Guided Missile Industry, 12 January 1959; op. cit.

¹²Exclusive jurisdiction makes protecting respondent anonymity difficult. I have avoided naming unions wherever possible and tried to substitute comparable unions (other building trades, other service unions) whenever feasible in quotations. Respondents' names are also changed.

of that application (for many jobs, such as machining parts in auto-supplier factories, there could be more than one option). With unionization relatively stable, “The burden of proof,” Joseph noted, “was on someone from the outside,” outside one’s industry or line of work. That rationale, that industrial density meant leverage in bargaining with employers, was and remains a powerful argument that any union can make during an organizing drive. That unions who broke conformity with industrial jurisdiction suffered penalties in terms of lower win rates will in turn be tested below.

4.2 Role reinforcement of jurisdiction

Decentralized organizing within the national unions also hobbled ambitious efforts outside the unions’ traditional boundaries. The union organizer is the most important initial contact between potential members and unions. Throughout the period organizers helped convey unions’ reputations, abilities and track records to potential voters. Thus how they channeled norms and information (Adut 2005, Centola, Willer & Macy 2005) and how that role might have changed is crucial for understanding evolution of the system.

In the past, most organizing was done by business agents in the locals. The business agent is a (frequently) elected staff member that is paid through the local’s dues. The agent’s duties can include hiring staff, keeping records, collecting dues, handling grievances and (virtually always) participating in contract negotiations with the employer. The business agent was usually the first point of contact between potential members and an interested union. His job was to convince employees that affiliating with his union was in their best interest. Karl, a union staff member, described the pattern:

The classic term is “hot shops.” Hot shops were places that weren’t unionized, maybe because they were small, maybe the union had lost a drive there in the past, or they were new. The locals would know about many of these shops, and they would keep an eye out for when the employees were pissed off or when the union had bargained a good deal [elsewhere], and they’d swing through then.

Such organizing was tactical rather than strategic. Business agents usually came from

the ranks of industry. Karl again:

When I began [in the late 1970s], the typical organizer was still someone from the industry who had taken place in an organizing drive. . . who had sometimes won, but often who had *lost* and then been “let go” for his union activity. The local would keep that person around, planning to try again at his shop in a year’s time. . . they might have a drive going on across town in the meantime, and they’d have him go work on that. You do a few of those, and soon you’re an organizer.

Mike, another retired business agent, described a similar trajectory among his craft union:

I started organizing when business was slack. I had seniority and I had a loud mouth. The [regional] office knew that I’d worked all over the place, so when they went after a company they liked to send somebody like me, who might know people.

Such respondent descriptions of older union organizing as decentralized, local and operating through social and industry ties accord with academic work contrasting older and newer organizing tactics (Bronfenbrenner 1997, Bronfenbrenner & Hickey 2004, Rooks 2004).¹³ Both the tactics of the union and the skills of the business-agent organizer best supported enrolling new members in the union’s core jurisdiction. Here it had density and thus leverage, and here the business agent’s own experience in the industry was a *bona fide*. Thus the key intermediary between the candidate unions and the audience of potential members, the organizer, had strong incentives to work within jurisdiction and thus to reinforce the existing boundaries.

Union members described the same system. As one building-trades organizer put it,

I have not met the electrician who would not join the Carpenters because [they] had ‘Carpenters’ in the name. . . . [I]t was more that, in the old days, you wouldn’t *see* a carpenter. If you were an electrician, and you were thinking about joining. . . there was a union for you to join: the Electrical Workers. [Interviewer:

¹³Most of the existing scholarship that compares older and newer organizing techniques is normatively focused on revitalizing the labor movement and critical of the “bureaucratic personality” (Fantasia & Voss 2004, p. 81) of older union practices. Most such critiques focus on the internally undemocratic practices of the “old labor movement” and stress the unions’ failure to adapt to the increasingly hostile environment they faced in the 1980s. This study takes no strong normative position on these older tactics. The collapse of membership in the 1980s seems sufficient indictment of past practice. The point in contrasting older with newer organizing tactics is simply to note how these different practices had different implications for how unions and workers mapped unions to industries and thus affected union voters’ lay theory of value.

Didn't the Electrical Workers organize in places like GE factories, though?] Sure they did, but that was the exception that proved the rule... most of the time, when you went looking for a union, you already knew which one you were looking for.

Several former unionists in fact were confused by the question of how they "picked" unions. Joseph, an industrial organizer active from the mid- to late-1960s, averred that "We didn't really *pick* that often":

You wanted a union? Fine, you probably had an uncle in the trade, or a brother, and he'd put you in contact with somebody. [Interviewer: Was it usually family?] No, not always, but you knew somebody you trusted. And that was your union.

This organizing pattern was not universal. The Steelworkers for example tended to do much of their organizing work through their national headquarters in Pittsburgh (Stepan-Norris & Zeitlin 2003). Organizing in new geographic areas, as for example when the electrical unions followed firms like GE into the south (Schatz 1983), often required separate, paid organizers who had few long-term connections to the community and who had to win over workers despite little personal or social history in the industry. Yet such centralized and long-range efforts were the exception in the two decades after 1960. A union that "broke" jurisdiction had to deal both with a fellow union that would protest the raiding of its turf and the distrust of potential members, to whom it would have to make a case for why it rather than the dominant union in their industry would be able to win the best agreement with employers.

4.3 Changes to justification, roles and structure

If industrial density and decentralized organizing are the primary justification and role structure that reinforced industrial jurisdiction, then any shift in voting to favor diversified unions should be associated with changes to them. Such changes have indeed occurred. New-member organizing particularly since 1980 has happened in the teeth of declining membership, from nearly one third of private-sector workers in 1960 to 9 percent in 2000 (Hirsch

& Macpherson 2004). The steepest, most sustained decline came during the early 1980s, as reflected in figure 1. Peter, a former staff analyst of a large international, described the change:

It used to be that union members were around. If you weren't one, you knew one. You didn't shop for unions, you looked one up. That wasn't true everywhere—in the south, of course, there weren't unions. There, unions had to introduce themselves, through the organizers, who weren't locals usually. *It's like everywhere's the south today.*

Today I think it's a lot easier to find out about a lot of unions. You can go online. But the personal connection, through your community, that kind of trust... that's gone. [Emphasis added]

The collapse in industrial density during the recession had more than the first-order effect of undermining the unions' bargaining power with employers. As a second-order effect, it sapped the unions' claims to new recruits that the union could win them good contracts. This could be seen most clearly in the value of the union wage gap, which has steadily declined since the late 1970s (Eren 2007, Freeman 1985, Wunnava 2004). The result was a feedback loop in which falling membership reduced density, which weakened appeals, which further reduced membership. This undermined the primary justification for industrial jurisdictions.

Had the recession's effects been merely economic, the recovery that began in 1983 should have pushed the jurisdictional system back toward its old strength. Yet most industrial relations observers agree that the early-1980s recession marked a break with previous downturns. Most obviously, neither organizing activity nor total membership rebounded during the recovery as they had in the past (Kochan, Katz & McKersie 1986). Explanations for this continued stagnation vary, but most scholars agree that increased employer opposition to unionization, seen for example in the explosion of Unfair Labor Practice (ULP) charges filed against employers during organizing drives (Flanagan 1989), played a major role (Roomkin & Block 1981, Block & Wolkinson 1986, Kleiner 1984, Freeman & Kleiner 1990).

Faced with grim economic news and entrenched employer opposition, unions moved first. Several acknowledged that the decentralized business-agent organizers upon whom many

unions had relied could no longer win campaigns. The organizers interviewed agreed that the world of going after “hot shops” had passed. Peter noted the contrast; building on his comment that “It’s like everywhere’s the south today,” he said that “Today’s organizing drives resemble the ones the unions tried in the South in the 1940s, like Operation Dixie,” the CIO’s massive (and massively unsuccessful) campaign to organize southern textile and forestry workers after World War II (Griffith 1988). The role of organizers is quite different in such a campaign: the unions has multiple targets—an entire firm, an industry within a city—rather than single ones. This change in focus, Karl confirmed, came from changes in employer resistance:

[When] employers largely accepted unionism. . . you could focus on how much the employees wanted to unionize. But today the employers resist so fiercely and the government largely stands aside, so the employee is less important in a way—it doesn’t matter how much they want the union, if the employer is dead-set against it, you’ll lose. So you have to organize the employers, in a sense. And that means more people, bigger drives.

Thus both who becomes an organizer and what an organizer does has changed. “More people” often means teams of organizers, frequently operating out of the national headquarters and visiting different cities during campaigns. The members of those teams may themselves have little personal experience working in the industry that the union tries to organize. As with so many other jobs in the not-for-profit sector (Markowitz & Tice 2002, Osterman 2002, Huising 2008), over the last generation union organizing has become increasingly professionalized. Karl contrasted the organizer who came out of the workplace, often in the context of a failed organizing drive, mentioned above, with his modern counterpart:

Today there’s so much more work picking industries, targeting industries, developing corporate campaigns. . . You need more experience with the employers as a group and the industry, so a lot of people on these teams aren’t from one job—they’re analysts. You still need people who can win the employees’ trust, that’s paramount, but they aren’t using their personal history to do that as much.

Such interviews document the recognition of changes to the lay theory of value that underlay industrial jurisdiction, but on the *candidate* side of the candidate-audience interface.

Why should voters value unions that are diversified across industries? The mechanism for a change in voter behavior should be sketched out. When union organizers have to build trust despite their lack of personal experience in potential members' jobs, as they had to after the early 1980s, deep industry experience cannot be their main selling point. A history of densely organizing an industry and bargaining good contracts with employers helps, but today's organizers more frequently find themselves organizing workers in industries where no such history exists. In such cases, credibility is better established by a track record of breaking into *new* industries, which requires the opposite approach to organizing from that found in the past. Carlos, a former union staff member working on corporate campaigns, emphasized the role that a successful "track record" plays in winning over unfamiliar workers:

It isn't useful to go over the things you can get them in the negotiations. At least not at first...you have to show them that you can get into those negotiations at all. And that means you talk up how you've unionized other groups of employees. [Interviewer: Similar employees, normally?] It helps, but they don't have to be. *When you're selling yourself as an organizer*, it's almost more impressive to say that you've brought in *all kinds of different workers*, because it shows that you can handle a lot of different challenges. [Emphasis added]

Carlos's comment suggests why potential members might be more willing in recent years to vote for unions with diverse organizing activity. Employees still care about the benefits that a union can win them, the hypothesized connection between the means of unionization and the end of a contract—the basis of a lay theory of value—has changed. Because winning an organizing drive has become so much more difficult, members must consider the benefits of membership in a given union, *conditional on becoming unionized* (Ferguson 2008). Unions that are unlikely to win an organizing drive will be devalued regardless of the hypothetical contract they could negotiate. To an employee considering two unions, one that has often organized her industry in the past but that has a poor record in recent drives and one that has less experience in her industry but a better record elsewhere, the latter will today seem more appealing. In other words, raising the salience of the organizing drive itself should reduce the relative importance of a union's industrial jurisdiction for potential members.

5 Analyzing changes to a theory of value

To gather evidence of a change in the theory of value employed by the unions' potential members, this study analyzes archival records of union organizing drives that were filed with the National Labor Relations Board (NLRB) between 1961 and 1999. The key hypotheses of this study are based on three variables—diversification, centralization¹⁴ and the number of unions centralized—and their interactions. Industrial jurisdiction implies penalties on unions that organize outside their jurisdiction, so the diversity of each union's organizing drives across industries each year is used to verify this. This approach echoes earlier theorizing on union jurisdictional penalties: "Although such diversification strategies may hedge against uncertainty by reducing the union's dependence on a single exchange relationship. . . diversification requires a union to adapt to unfamiliar environments and workers who differ from traditional members" (Fiorito, Jarley & Delaney 1995, p. 619). Not only would workers outside the union's historic jurisdiction need convincing that the union cared about and could represent their interests but the union could also alienate existing members by "diluting the union's community of interest and obscuring its identity, thereby adversely affecting members' solidarity and commitment" (Cornfield 1987, p.190).

Structural reforms to how unions conduct their organizing are theorized to offset such penalties. The centralization of organizing at the level of the national union is tested here as an example of such a reform. As interview respondents repeatedly stressed, unions began creating such departments in the 1980s to overcome what they saw as fierce employer resistance to organizing campaigns. Thus having such a department is hypothesized to make election victory more likely.

The number of unions that have adopted centralized organizing departments is used to operationalize the diffusion of the new lay theory of value. The principle behind doing so is that this number tracks the transformation of the union-organizing role and the shift

¹⁴Data were also gathered on unions' adoption of professionalized organizing staff. Models using this measure and the number of unions professionalized yield very similar results to the models using centralization, and are available from the author upon request.

from industry veterans to professionals with less industry experience. As figure 4 shows, increases in these adoptions do correspond closely to increases in the share of currently-unionized employees represented by such unions. Additionally, the number of unions with such departments does *not* spike in 1982. The rapid adoption of such departments begins about half a decade later, which corresponds with unions' learning that their old tactics no longer worked and slowly making changes (Craft 1991) to compensate.

[Figure 4 about here.]

The main effect of this variable is hypothesized to be positive because it corresponds to the spread of a new theory of value. Win rates generally rise over time, though, and the number centralized itself varies in time, so few theoretical conclusions can be drawn from a positive result in and of itself. Instead the interactions of these three variables will be important to test. Interacting diversity with centralization for example can test whether such reforms have their hypothesized effect of reducing the penalties that "space invaders" face. Interacting centralization with the number of unions that have adopted centralization checks whether the benefits of centralized organizing have always existed and were belatedly realized by many unions, or whether such benefits only appeared as more unions made the change. Interacting diversity with the number centralized meanwhile tests whether the penalty associated with violating jurisdiction declined, as it should have if voters abandoned their earlier theory of value.

The theory advanced here suggests however that these two-way interactions, by themselves, will not capture the full story. Diverse organizing through a centralized department for example *should not* make success more likely if it takes place early in the time period, i.e., at a time when few unions have adopted such reforms. Indeed such tactics may be a net hindrance early in the period, and thus the expected sign on the two-way interaction is ambiguous. Similarly, diverse organizing by itself should not produce benefits even if many unions have restructured their organizing; if potential members reward specialization on organizing rather than diversity *per se*, then they will only be more likely to vote for such a

union if it has also made such structural changes. A three-way interaction between diversity, centralization and the number of unions that have centralized is therefore included to test for the effect of all three elements' being present. These hypotheses are summarized in table 1.

[Table 1 about here.]

5.1 Data sources

In union organizing drives the mechanism of audience evaluation is a vote for or against a candidate union in a representation election. Under the National Labor Relations Act (NLRA), the basic law covering trade-union formation in the United States, a union can petition the NLRB to hold a secret-ballot election at a workplace in order to determine the employees' interest in having the union represent it in collective bargaining with their employer over the terms and conditions of employment. The union must present signed cards showing interest by at least 30 percent of the employees in the proposed bargaining unit in holding an election. Conditional on clearing several procedural hurdles, the NLRB schedules and conducts the election on average within two months of the petition's filing. A simple majority of votes cast is required for victory, upon which the NLRB certifies the union as the employees' representative. The employer is then legally obligated to bargain "in good faith" with the union for one year before any further actions can be taken (McGuinness & Norris (1986) have a detailed review of the process). The efficiency and effectiveness of this process has been a subject of heated debate for many years, but despite its flaws the election procedure remains virtually the only way that unions can enroll new members without the active cooperation of the employer, which is unsurprisingly rare. The great benefit of these elections for this study is that the organizing drive is recorded *before* the election takes place. Thus the collected NLRB records of union organizing drives include failed founding attempts. Such failure data is critical for the empirical study of diversification because it makes it possible to distinguish between those organizations that tried and failed to diversify

and those that never tried.

The primary data used to test these hypotheses come from the *FAST* database of NLRB election petitions, originally developed by the AFL-CIO's Food and Allied Service Trades Department and now maintained by the Federation's Collective Bargaining Department. In the 1950s the NLRB faced an increasing number of requests from labor unions for statistical data on the number of organizing drives in various industries, the share of drives in which unfair labor practice charges were filed and the like. To deal with the increased workload, in 1961 the NLRB agreed to pass along records to the FAST Department every month; in return, the FAST agreed to field data requests directed to it by the NLRB. The NLRB shifted to a new database for its own records in fiscal year 2000, which has introduced some difficulties in comparing new records with older ones; hence the data for this study stop at the end of calendar year 1999. The *FAST* data is nearly complete; the cases that do contain missing values, such as industry, appear to do so at random. Certainly the NLRB and other policymakers have treated these data as representative of labor organizing in America for decades (cf. NLRB (2007)).

The *FAST* database holds more than 213,861 records. This study excludes three groups of records for theoretical and empirical reasons. First, most craft unions are excluded. There is little theoretical reason to assume that craft unions would face the same penalties for violating industrial jurisdictions that industrial unions do, because craft unions do not *have* industrial jurisdictions. The craft unions' actual jurisdictions, based around occupations, are not recorded in the *FAST* data, which makes it impossible to calculate any meaningful measures of their organizing diversity. The exception to this are the "compound-craft" unions such as the Carpenters (Ulman 1955) that historically expanded their organizing to cover multiple crafts in a single industry (usually the building trades) and thus by 1960 resemble industrial unions more than craft unions (Hannan & Freeman 1988).¹⁵ Craft unions account for 44,849 records.

¹⁵Excluding the compound-craft unions does not change the substantive results.

Second, unions that are independent from the AFL-CIO for the entire time period are excluded. Such unions are not subject to the federation's no-raiding agreements and there is no theoretical reason to assume that they should be bound by the same jurisdictional principles as member unions.¹⁶ Independent unions account for 69,312 records.

Third, because this analysis considers the impact of industrial diversity of a union's organizing on its success, including unions that have very few drives and thus by definition very little diversity can overstate the effect of diversification. I therefore exclude those unions that averaged fewer than ten organizing drives annually in the study period. Such unions account for only 3,400 records. The resulting dataset holds 86,299 records for 92 industrial and compound-craft unions that were affiliated with the AFL-CIO for all or part of the study period; these records comprise 43 percent of all election petitions filed.

The FAST Department supplemented the NLRB's records, adding for example the establishment's industry in the form of the three-digit SIC code, in which the potential bargaining unit was employed. As discussed below, I use these data to construct measures of industrial diversification for unions' organizing efforts over time. For that measure, I also draw on the *Standard & Poor's Compustat Industry Segment* files. Data on union density come from the *Union Membership and Coverage Database from the CPS* (Hirsch & Macpherson 2004). Data on employment, including unemployment, come from the Bureau of Labor Statistics, including the *Current Employment Statistics* and *Local Area Unemployment Statistics* data series.

¹⁶Excluding independent unions also removes the International Brotherhood of Teamsters (IBT) from the analysis. The Teamsters were expelled from the AFL-CIO in 1957 for racketeering and remained unaffiliated until late 1995. Throughout the period the Teamsters launched more organizing drives, more diversely, than any union, and they also *lost* more drives than anyone. The Teamster's win rate only began to improve in the late 1980s after a long and difficult change in leadership. Because the Teamsters launched so many organizing drives that only began reliably to succeed late in the time period, including them in the analysis would produce results that appear to support my hypotheses despite the obvious alternative explanations for the Teamsters' trajectory. Hence removing the IBT from the analysis is a more conservative test.

5.2 Primary variables: Diversification, centralization and professionalization

The diversification of a union’s organizing efforts is measured here using a Hirschmann-Herfindahl index (HHI) that has been weighted by the relatedness of its component industries. An unweighted index of diversity would simply be the sum of squared shares of organizing drives across all industries. Such an index would however have an important bias, reflecting the SIC’s own bias in distinguishing between industries. The SIC makes fine-grained distinctions between different types of production industries but coarse-grained distinctions between different types of service industries. Because most American unions have their roots in manufacturing, an unweighted index based on the SIC will overstate diversification within manufacturing while understating diversification outside of manufacturing and thus understate differences in unions’ diversification. One corrective is to adapt the procedure outlined in Teece, Rumelt, Dosi & Winter (1994) to generate a matrix of weights, $\tilde{\mathbf{T}}$, based on how related industries are.¹⁷ If δ is a $k \times 1$ vector containing the shares of a union’s organizing drives in each of k industries in a given year, then diversification is calculated as $\delta' \tilde{\mathbf{T}} \delta$. It is this measure that is plotted in figure 2. In that figure, though, the scale runs upward from zero indicating increasing concentration. In the model results, I subtract the index from one so that the coefficients have the intuitive interpretation of increasing diversity.

This index resembles the share of a union’s membership in the industry of its greatest concentration as operationalized by Maranto & Fiorito (1987). That study was the first to

¹⁷This procedure builds off the assumption that the frequency of firms’ operation in multiple industries is in part a function of how closely related those industries are. That procedure yields a matrix \mathbf{T} where $((t_{mn}))$ is a t-statistic measuring deviation of the observed frequency of firms operating in industries m and n from the expected frequency based on the marginal probabilities of firms’ operating in m and n , where the probabilities follow a hypergeometric distribution. To use these t-statistics as weights, I calculate the matrix $\tilde{\mathbf{T}}$, where

$$((\tilde{t}_{mn})) = \begin{array}{ll} \frac{t_{mn}}{1.96} & \text{if } t_{mn} > 1.96 \\ 0 & \text{if } -1.96 \leq t_{mn} \leq 1.96 \\ \frac{-1.96}{t_{mn}} & \text{if } t_{mn} < -1.96 \\ 1 & \text{if } m = n \end{array}$$

hypothesize that “the extent of membership concentration in one industry is expected to have a differential effect on a union’s organizing success, depending on whether the election unit is in its primary jurisdiction” (p. 229). The weighted index extends this reasoning in two ways. First, Maranto and Fiorito were more concerned with how overall diversification would affect the advantage a union had in organizing within its “primary jurisdiction” rather than its likelihood of success *outside* that jurisdiction. Second, the arbitrary designation of a “primary” industry makes less sense when for example only 11 percent of a union’s activity takes place within that industry in a given year.¹⁸ A Herfindahl index better reflects genuine diversification by capturing both the weight of any dominant category and the distribution among lesser categories.

As discussed above, the increasing difficulty of forming a union in the United States has led workers to put relatively more emphasis on a union’s ability to run a successful organizing campaign, the skills for which are more generalizable than those required for industry-specific contract negotiations. Accordingly the effects of diversification on organizing success are expected to be curvilinear, reflecting how the benefit of being known as a general organizer can outweigh the cost of organizing in an unfamiliar industry. Therefore when diversity is included as an independent variable its square is also included in the model.

Data on the centralization of organizing was gathered in telephone interviews with staff in the unions’ organizing departments or (where no central organizing structure existed) the equivalent to the operations department in the national union’s headquarters. Respondents were asked, “Does your union have a national-level office in charge of organizing? [If yes] When was it established?” The answers were then used to code a dichotomous variable for centralized organizing. In the same interview respondents were asked, “What type of background do you look for in an entry-level organizer? What skills are important for an

¹⁸Focusing on a single two-digit SIC industry also ignored that many unions’ core memberships were and always have been spread across two or more two-digit industries—how the UAW for example had its core membership in SICs 34 (Fabricated metal products) and 35 (Industrial machinery and equipment), or how the Retail, Wholesale and Distributive Workers’ members were spread widely across the wholesale- and retail-trade categories between 50 and 59.

organizer to do their job? What background do your senior organizers have?” Unions where respondents noted that new organizers were expected to have college degrees or similar experience, a background doing online or other research, or quantitative skills were coded as having an emphasis on a professional organizing staff. In principle such a staff can exist without a centralized organizing department, but in practice many unions with professional staffs also have such departments. The number of unions that have adopted each practice is then calculated as the sum of all unions that have adopted in that year or prior ones. This assumes that unions tend not to abandon either practice, which the interviews seemed to confirm.

Other research on union organizing strategies (see especially Voss & Sherman (2000) and the contributions to Milkman & Voss (2004)) has stipulated and found positive effects on win rates associated with the centralization and professionalization of organizing campaigns. Those findings jibe with the weak support found in Reed (1989) and Peterson, Lee & Finnegan (1992) that union tactics like targeting employers’ sources of finance and campaigning at multiple employer establishments were associated with higher win rates. Such work has tended however to assume that jurisdiction no longer matters and focus closely on the tactics of individual campaigns. This study shifts attention from individual organizing drives to understand what implications such structural changes within unions, against a background of declining unionization, would have for the system of jurisdiction in which those unions operate.

5.3 Other variables

Because the jurisdictional system described here affects member unions of the AFL-CIO, unions should fare differently when they are not members of the federation. *Disaffiliation* is a binary variable set to one in for unions in the years (if any) when they were outside the federation. The direction of its effect is not hypothesized. While unaffiliated unions are not bound to respect other unions’ jurisdictions and thus should not suffer specific penalties

for violating jurisdiction, their operating outside of the AFL-CIO has long exposed them to criticism and attack by the unions within the federation. Which effect dominates is an empirical question.

The change to the theory of value described here posits no effects for organizing within a union's core industries. Organizing drives there should on average be more successful than drives elsewhere, though the advantage to core-industry organizing may decline over time. *Core industries* were identified for each union using three steps. First, the industries targeted by each union in the 1960s, the period in the sample data with the most unions and greatest supposed adherence to the jurisdiction scheme, were tabulated and the most common industries flagged. Second, the list of industries for each union was checked against a brief history of the union (Hanson 1988) to look for missing core industries and early outliers. Doing so generated a tentative list of core industries for each unit that existed by 1970. Third, these lists were updated to account for mergers and amalgamations so that the expanded unions would "inherit" all the core industries of their predecessors. Thus for example when the United Food and Commercial Workers first appears in the data set in 1979, it has listed as core industries all those claimed by the United Packinghouse Workers, the Amalgamated Meat Cutter and Butcher Workers and the Retail Clerks International Association, who joined to create the UFCW that year.

The theory developed here assumes that a union suffers penalties when it first enters a new jurisdiction. There are however also system-level implications of jurisdictional invasion that resemble the trade-offs between legitimation and competition seen in population ecology (Hannan & Freeman 1987). Many unions may compete within a given industry at one time. While the presence of rivals reduces the likelihood of success for any one union, the fact that so many have targeted a given industry also suggests that there is something particularly appealing about that industry. Whether the number of unions active in an industry better reflects the vicissitudes of competition or the richness of the rewards is an empirical question worth investigating; no *a priori* assumption about the effects of such union rivalry are made.

Here *union rivalry* is operationalized as the number of different unions active in the targeted industry in the prior three years.

The *size of industry* is recorded using the BLS's Quarterly Census of Employment and Wages and *industrial concentration* using the Department of Commerce's four-firm concentration statistics for various SICs. Both controls emerge from industrial-relations theory: employees in growing industries have less reason to fear for their jobs if they engage in union activity (Bronfenbrenner 1996) while in less-competitive industries employers have larger surpluses to potentially share with the workforce (Dunlop 1958, Galbraith 1968). Larger bargaining-unit size has long been hypothesized to lower the likelihood of organizing success (see for example Flanagan (1989)) due to free-rider problems inherent in forming an organization that will benefit all workers regardless of their individual efforts to create it (Olson 1965), while larger unions are thought to increase success both because a large membership is a palpable demonstration of a union's clout or resources and because size, as a product of past success, is a proxy for unobserved union organizing ability (Hannan & Freeman 1988, Jarley, Fiorito & Delaney 1997). *Unit size* here is controlled for by including the number of eligible voters in the model. The log of *Union size* for affiliated unions is taken from membership figures reported in the AFL-CIO's biennial conference proceedings, with membership changes in even-numbered years assumed to be linear between reports. Membership figures for non-affiliated unions are taken from those unions' own national conventions, which also tend to be biennial. The legal environment in the form of the presence or absence of right-to-work laws is coded based on the data gathered on the National Right to Work Foundation's web site. While such laws generally make union organizing more difficult, they usually have the greatest effect on convincing organizers to terminate a drive before election rather than to go to a vote and lose. Thus the drives in such states that do go to election are a self-selected sample in which it is reasonable to assume that the organizers had grounds for expecting success (Ferguson 2008). Finally the number of *drives per year* is included to control for the fact that unions that unions that engage in more organizing

activity are likely to appear more diverse as a function of their level of activity.

5.4 Results

I estimate probit models in which single union organizing drives are the units of observation. The dependent variable in these models is victory in the union representation election. Because there are many observations for each union and because unobserved heterogeneity among unions' organizing tactics is likely, I also estimate fixed-effects probits that control for the union. In all models the standard errors are clustered by union.

The most important alternative explanation for the reduced penalties to diversity over time is that the jurisdictional system simply collapsed after 1980 and that, absent constraints, voters were just as happy to vote for one union as another. Such an explanation does not explain why what had been a penalty should become a benefit, but a simpler population-level mechanism like a Matthew Effect (Merton 1995) could account for such a trend. This explanation would imply that, once time is controlled for, unions' adoption of centralized organizing departments should be insignificantly related to election success. To test this alternative explanation, I estimate models that include fixed effects for each year and that interact diversity with years. In this model, the number of unions centralized will drop out because it varies solely with time, but the interaction of number centralized with the other variables of interest can still be estimated.

Table 2 reports regression results. Model I presents the estimated coefficients for the model controls. Disaffiliation in particular has a negative coefficient, which suggests that the reputational or other penalties for operating outside jurisdiction outweigh any benefits from being "free" of no-raiding agreements. Core industry and union rivalry both have positive coefficients, which suggests first that unions are indeed more likely to win elections in their core industries and second that multiple unions operating in a given industry is more a sign of "low-hanging fruit" (Lipset, Trow & Coleman 1956) than of desperate competition. The other controls move in the directions that industrial relations and sociological theory

predict. It is worth noting that, even with just the controls present, the effect of the number of drives launched per year is essentially a well-estimated zero. There is apparently no direct relationship between the level of organizing activity and victory in individual drives, once many union and industry characteristics are controlled for.

[Table 2 about here.]

Model II introduces the measure of organizing diversity. Because the argument developed here assumes that unions develop a track record of past organizing successes that they can present to audiences, diversity's effect should be curvilinear. That is, unions suffer initial penalties when they start to diversify but see those penalties disappear as diversification proceeds. The model supports hypothesis 1 that diversification does carry with it a substantial penalty. The quadratic term suggest though that the penalties disappear for unions whose diversity ranges above .78, about the level reached by the ILWU and the UAW in figure 2. These are two of the most diversified unions in the sample. Model III introduces the measures for centralization and for number centralized. Again the square of the number centralized is also entered into the model. This is because the number of unions with centralized organizing is virtually zero at the start of the period and begins rising only after the early 1980s while the win rate falls before 1982 and then rises, as shown in figure 1. Centralized organizing is associated with a greater likelihood of winning an election, consonant with hypothesis 2. The number of unions with centralized bargaining also has a positive effect above 7.71, i.e., after eight unions had switched to centralized bargaining. The AFL-CIO crossed this threshold in 1988. This is consonant with hypothesis 3. It should also be noted that, once the effects of diversity and centralization are controlled for, the coefficient on core industry becomes insignificant.

Models IV and V introduce the interaction terms. The two-way interactions in model IV are not by themselves significant, which should be expected if some of these effects change their sign before and after the early 1980s. Including the three-way interaction in model V however makes the underlying patterns clear. For example, a union with centralized or-

ganizing that attempts drives in diverse industries experiences lower win rates when the number of unions with such organizing techniques is small—i.e., earlier in the period under consideration. Hypothesis 4 therefore has support only later in the period, which is consistent with the events described. The adoption of reforms also matters: organizing diversely when many unions are centralized does not produce a significant change in the likelihood of victory if the union does not itself have a centralized organizing department. This finding is consistent with idea that union voters in the 1980s and afterward did not favor “generalists” as such but rather the structural changes associated with their theory of value. Finally, having a centralized organizing department later on in the period is actually associated with a lower likelihood of winning, *if* the union’s organizing remains concentrated. This supports hypothesis 6, but the latter penalty is relatively small.

Figures 5 through 7 show these findings graphically. Figure 3 had shown the estimated effect of diverse organizing on the probability of success for different *years*, but that association is problematic because it conflates the union structural changes that are of primary interest with other time-varying effects. Figure 5 therefore re-scales the *x*-axis to show changes in the number of unions that have adopted centralized organizing rather than time. The switch in diversification’s effect, from a penalty to a benefit—the two-way interaction between diversification and the number centralized—is still visible. Yet this effect in turn conflates diversification by unions that had adopted centralized organizing practices and diversification by unions that remained decentralized. Figure 6 therefore disaggregates the pooled effect into two parts, showing the three-way interaction between diversification, the number centralized and the adoption of centralized organizing. Figure 6 clearly diverse organizing is only associated with better win rates over time for those unions that had adopted centralized organizing practices, as hypothesized. Unions that diversify their organizing *without* centralizing the activity have no such benefit; these “opportunists” are less likely to win than the baseline, and the penalty that they face does *not* diminish with time.

[Figure 5 about here.]

[Figure 6 about here.]

Figure 6 contains an anomaly: it shows that centralized unions *always* benefitted from diverse organizing, which is not what the theory described here predicts. This apparent benefit however is an artifact of comparing centralized to non-centralized unions. All of the estimated models predict that centralization by itself has a significant positive effect on win rates. Thus the preferred comparison would be between centralized organizers who concentrated their organizing activity within a few industries and centralized organizers who diversified their organizing activity across industries. Figure 7 therefore breaks out centralized organizing by concentration. When few unions have centralized their organizing departments, centralized unions that organize diversely win more often than decentralized unions, but *less* often than centralized unions that concentrate their organizing. Diversification thus still carries a penalty among this group. Yet the gap between these unions and the “merely centralized” shrinks over time, such that by 1992¹⁹ unions that are centralized and diverse are *more* likely to win organizing drives than any other group. After 1992, therefore, unions that have adopted structural reforms are expected to see an unambiguous benefit from diverse organizing.

[Figure 7 about here.]

Model VI introduces union fixed effects. Disaffiliation, which has little within-union variation to start with, naturally becomes insignificant in this model. The variables of interest however remain unchanged; the effects found in model V do not appear solely to be the effect of unobserved heterogeneity in union tactics. Model VII introduces year fixed effects. As discussed, the number centralized drops out of this model. Yet the other coefficients remain significant and of comparable size. That such relationships between the adoption of centralization, diversification of organizing and win rates should remain significant even when individual union and year effects are controlled for strongly suggests that the results

¹⁹Referring back to the corresponding point on the x -axis of figure 3.

documented in figure 7 are not simply picking up an unobserved time trend or union variation but instead reveal a meaningful correlation among these variables. In particular there is no evidence in these patterns of voter behavior to suggest a sharp break with past practice in 1982, the point at which the union-side data suggest things entered a crisis. New patterns of voter behavior emerged more gradually and were only widespread enough to change the expected effects of diversification by the early 1990s, nearly a decade later. This is inconsistent with the idea of simple jurisdictional collapse but accords well with the diffusion of a new lay theory of value among potential union members.

These results support the story told by organizers about how their and potential members' theory of value for joining a union changed. The penalties associated with violating jurisdiction declined over time, but not universally. Rather than simply voting in greater numbers for diverse unions over time, which would be consistent with a simple collapse of jurisdiction or a change in voters' preferences toward generalism for its own sake, audiences rewarded those unions who had diversified *and* who had undertaken the structural reforms associated with emphasizing organizing drives over contract negotiation. They voted, in other words, for the unions more likely to win recognition in the more hostile organizing climate of the 1980s and 1990s. In so doing, they downplayed the formal boundaries of industrial jurisdictions, boundaries that represented little that was of value to them.

6 Discussion and conclusion

The unions of the AFL-CIO developed a strong jurisdictional system that helped them secure labor-market power within those jurisdictions and thus gave them leverage to bargain agreements with employers that benefited their members. Members in turn supported the jurisdictional system. By voting against unions that were not specialized in their industries more often than against unions that were, potential members did not endorse specialization within a jurisdiction *per se* but rather cast their lot with unions that, because of their

specialization, were more likely to win agreements that gave them, in Samuel Gompers’s famous formulation, “More” (Currarino 2003). Members’ expectations were reinforced by a role structure of organizer-worker interaction wherein local business agents who had history in and detailed knowledge of the industry—and who were often slated to negotiate with the employer—connected candidate unions to members through pre-established social channels. While unions could “escape” some of the constraints of jurisdiction by disaffiliating, they could not completely overcome the suspicion that potential members would have of a union that operated outside a seemingly well-functioning system.

A quarter-century ago, that system stopped functioning well. Specialization within an industry went from being a winning strategy for unions to being a recipe for decline. Declining union strength undermined the means-end connection that members had assumed between jurisdiction and better contracts. It did so in two ways. First, the union wage premium declined over time. Second, the increasing difficulty of organizing new members made evaluating unions on contract-bargaining skills secondary to evaluating them on organizing skills.

Within organizing, unions and new members found the basis for a new theory of value. Unions’ new organizing tactics, often focusing on multiple establishments in unfamiliar industries that were targeted by teams of professionally-trained organizers, appealed to new members who had few pre-established social contacts with unions and who pictured themselves becoming business agents. Such organizing was by its nature more portable across industries. Yet the unions who have had more success organizing outside their old jurisdictions have not been preferred for their lack of jurisdiction in and of itself any more than their specialization in earlier years was preferred in and of itself. Rather, their track record organizing in new industries is a proxy for a set of priorities and skills that potential members today see as valuable.

This study advances thinking on the operation of social classification by documenting how such a change in valuation might occur. Insofar as most applications of a category

scheme are implicit and justifications are rarely spelled out, direct evidence of how audiences use and value categories will necessarily be hard to find. The approach used here gathers evidence whenever possible from the people who helped perpetuate the old scheme and its replacement. Its primary quantitative tactic though is to determine the roles by which a scheme is reinforced and then to connect changes to those roles with changes in how audiences evaluate candidates. In union organizing drives, a key role has been the organizer and the unions' structuring of her function, as other work devoted to rebuilding the labor movement has suggested (Milkman & Voss 2004, Fantasia & Voss 2004).

Research on classification has deep if under-emphasized roots in network theory, as evidenced by the importance of the mediated market in Zuckerman's (1999) early formulation. This study proposes that uncovering different role structures and how they reinforce or erode patterns of valuation is a swift and deep channel for this research stream to follow. (White 2008) outlined such a process more than forty years ago when he described how culture would arise out of network interactions:

People develop culture to meet their needs to visualize, operate in and modify the social structure to which they belong. Some nets persist for a very long time. The pair relation on which the net is based remains stable and clearly defined. *New persons are added to and leave the net, but according to clear-cut rules.* In such a net it is natural for the simplest kinds of indirect relations to be "institutionalized," that is, recognized in that culture as a distinctive new kind of relation. *Indeed, the rules of admission to the net regulate an indirect relation.* (White 2008, p. 11)

"The principal result of this evolution is the definition in the eyes of participants of a new type of relation, equivalence within the structure" (White 2008, p. 6).²⁰ In White's formulation, category schemes are as much a product of the patterns of interaction among audience members and candidates as they are of the candidate properties on which audience members discriminate. Theories of categorization that assume that the process is mainly cognitive bracket social interaction. They shift focus to the categories themselves (Ruef 1999) and leave unexplored why audience members would need to agree on the categorization of

²⁰Quoted in (Santoro 2008).

candidates in the first place (Hannan, Pólos & Carroll 2007). Such approaches have little to say to the “roles from networks” tradition that White and his co-authors developed in structural sociology (White, Boorman & Breiger 1976, Boorman & White 1976). One implication of this study, though, is that the change in valuation that potential members made of unions after the 1980s resulted in part from changed interactions between workers and unions, in particular the declining familiarity of workers with unions and the increasing rarity of union activity in any given industry. Future research into changes in category schemes should look for such changes in social-network patterns. The goal in doing so would be to know whether particular two-mode network structures tend to encourage, reinforce or erode category schemes. Simulation work seems an obvious way to develop some theoretical propositions on this front.

Understanding how the categories of trade unionism were reconfigured does not however yield many satisfying strategic implications for the labor movement. Though they are beyond the scope of this study, the roots of many unions’ branching out into new groups of workers are often quite historically contingent, not the sort of things that other unions can consciously emulate. The UAW had early success organizing university administrative staff, for example, because it absorbed the RWDSU’s erstwhile District 65, a group of locals that had already organized some office workers and that broke with the RWDSU over its support for the Vietnam War. The UAW had itself left the AFL-CIO over Vietnam in 1969, and that political act continued to give it credibility among many new members well into the 1980s. Rosemary, a union staff member who got started in the labor movement in 1983 by organizing university staff into a UAW local, put it succinctly: “We wanted to be in a union that we could be proud of. We knew the stand the UAW had taken on Vietnam, and that resonated quite strongly with many of us.” A “hardhat” union like the Painters could not make similar appeals to office workers even if it wanted to. The bicycle messengers mentioned above had similar thoughts in mind when they rejected the Teamsters in favor of the ILWU; one activist said simply that “We wanted to be in a union that wasn’t a bunch of goons.” This is not

to imply that the Teamsters *were* goons and the ILWU were not, only that many couriers thought that that was the case.

Complex organizations have complex identities; the fact is not limited to labor unions. Apple and Google have reputations as progressive employers that are independent of the perception of their products (Briscoe & Safford 2008). 3M developed a reputation for cutting-edge research and development even though it was best known for quotidian products like Scotch Tape (Jacobs 1968). Categorization may lead audiences to focus and organizations to specialize on one element of their identities, but the elements that are downplayed are still available. If the basis of valuation changes, those elements may become quite valuable indeed, but rarely are they originally developed for that purpose. The results in this study do suggest that unions that have shifted toward centralized organizing with professional staffs have been more successful in recent years than unions that kept organizing local. Yet many of these unions—the UAW, the ILWU, the SEIU, even the UBC—have taken “maverick” positions against the federation in the past. Given the confounding of political stances with the structural changes to organizing seen here, it remains an open question whether a “loyalist” union like the Boilermakers or the Glass Molders could change potential members’ perception of them. Even if they made the structural changes, they may not have the repertoire of past reputational actions that started many “generalists” down that road.

The stability of this new system of valuation is also open to question. Industry knowledge, particularly of the culture of industry and the details of the work process that were learned on the job and determined pay and performance (Doeringer & Piore 1971), is inherently less “abstractable” (Abbott 1988) and portable than corporate research and professional organizing. Today, when some unions have changed their style of organizing and others have not, sorting on that specialization is a useful way to differentiate among candidate unions. Should all or virtually all unions begin to organize in the “new” way, then specializing in such portable skills would be less useful as a means to differentiate. At that point, with the first-stage screen of organizing ability held more or less constant across unions, a specific

union's contract-bargaining ability might well again become the best thing for audiences to focus on.

Thinking through such a change suggests one reason why cognitive explanations for categorization have seemed so compelling in sociological research. A category scheme that is stable in the long run will have as its basis of value some characteristic like deep industry knowledge that is inherently difficult to abstract. In a stable system, audience members will be seen making distinctions on durable, "concrete" differences between organizations. Absent change in the system it is easy to assume that audiences make such distinctions for their own sake. Doing so though leaves unexplained why the categories that audiences use sometimes completely change (Ruef 1999) or why a particular scheme is agreed upon in the first place (Lounsbury & Rao 2004, Zuckerman 2008). As with many things in organizations, the value assumed to inhere in a category scheme is usually implicit, and it is only when organizational practices are threatened and must change that the justifications for using them become explicit (Perrow 1986, Powell & DiMaggio 1991, Barley & Kunda 1992). This is why upheaval in a system of organizations like the trade unions is so important to consider. Future research into category schemes should pay close attention to the justifications that audience members give for using the scheme and be alert to changes, either in the rationale for applying the existing scheme or in the rationale for applying new categories.

The irony is that even as virtually all observers agree that industrial jurisdiction is an outdated and useless concept, labor's jurisdictional system is still the basis for sometimes bitter disagreement. The disaffiliation of seven unions in 2005 to form the Change To Win coalition (Master & Rosenstein 2005) was driven in part by its member unions' advocating the "rationalization" of the AFL-CIO to have fewer and larger unions that would be better prepared to focus on organizing new workers in multiple industries (Bai 2005). Fifty years after the merger that formed the AFL-CIO, "intra-union debates on what sometimes seemed arcane questions of jurisdictional boundaries" were still occasionally being "spectacularly dramatized."

Organizational crises are fruitful for research if not always for the organizations themselves. The collapse of the American labor movement has been a calamity. That its struggles to reinvent itself can give researchers insight into the workings of social categorization and valuation is cold comfort indeed. Whether and how that movement will rebuild itself is one of the great looming questions of social science and public policy. This study points to how some changes that unions have made in the medium-term, such as the centralization of organizing and the training of full-time, professional organizing staffs, have apparently been productive, albeit within a context where even the high-performing unions have expanded their membership but slightly. Though the old is dying, the new is clearly not yet born. It is almost impossible with one system, even one involving scores of unions over scores of years, to know what elements of past behavior may predict future performance. The most urgent next step in this research therefore is to conduct similar explanations in different organizational settings to build the breadth of comparisons that would make such predictions feasible.

Appendix: A note on mergers

The focus of this paper is on recruiting new members, but mergers are part of the same process and should show the same trends. Mergers are a way for unions both to increase their membership at a stroke and to lay the groundwork for organizing in a new industry, essentially by buying a stake in the unions that have organized there in the past. Figure 8 shows that the frequency of mergers increased while the total number of unions in the federation steadily declined. The industrial “logic” of mergers also changed. The bulk of mergers in the 1960s and early 1970s involved very small unions bringing at most a few thousand workers into a much larger union in a related field, as when the Glove Workers brought their 3,000 workers into the 290,000-strong Amalgamated Clothing Workers in 1965. The mergers of any size before 1980 involved craft-based unions *within* a single industry uniting to form

an industrial union, as for example when several mail unions formed the American Postal Workers Union in 1969 or when several railroad unions joined to form the Transportation-Communications International Union in 1973. Such mergers reinforced industry boundaries as the proper divisions between unions and were thus jurisdiction-preserving. Even the largest merger of the 1970s, the birth of the United Food and Commercial Workers from the Amalgamated Meat Cutter and Butcher Workers and the Retail Clerks International Association in 1979, united two trades (butchers and checkout clerks) within grocery stores for purposes of collective bargaining. As manufacturing employment shrank in the early 1980s, mergers across industries sped up, as reflected both in the “risk” of a union merging with another and the size of the unions thus absorbed. Figure 9, which shows the path of fifteen unions’ entry into the UFCW, demonstrates how mergers became increasingly random through the 1990s, by which point the UFCW was absorbing insurance, textile and chemical workers along with more related unions in retailing and wholesaling.

[Figure 8 about here.]

[Figure 9 about here.]

There were not enough mergers over the last four decades for statistical analyses to have any power. It is suggestive though to note that several unions that largely rejected the idea of overhauling their organizing operations, such as the UFCW, embraced mergers as a growth strategy (Kochan, Katz & Mower 1984). Mergers thus provided a second channel by which the unions’ own efforts to maintain their membership had the unintended effect of eroding the very jurisdictions that they once relied upon to recruit new members.

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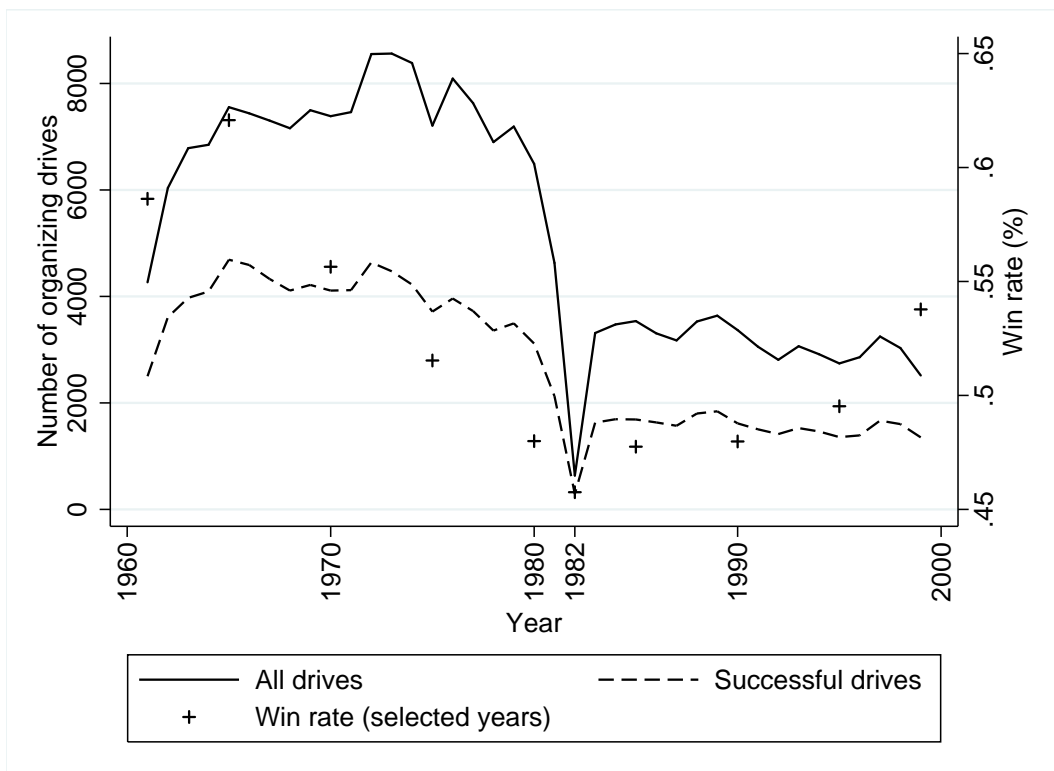


Figure 1: All and successful union organizing drives, by year, 1961–1999

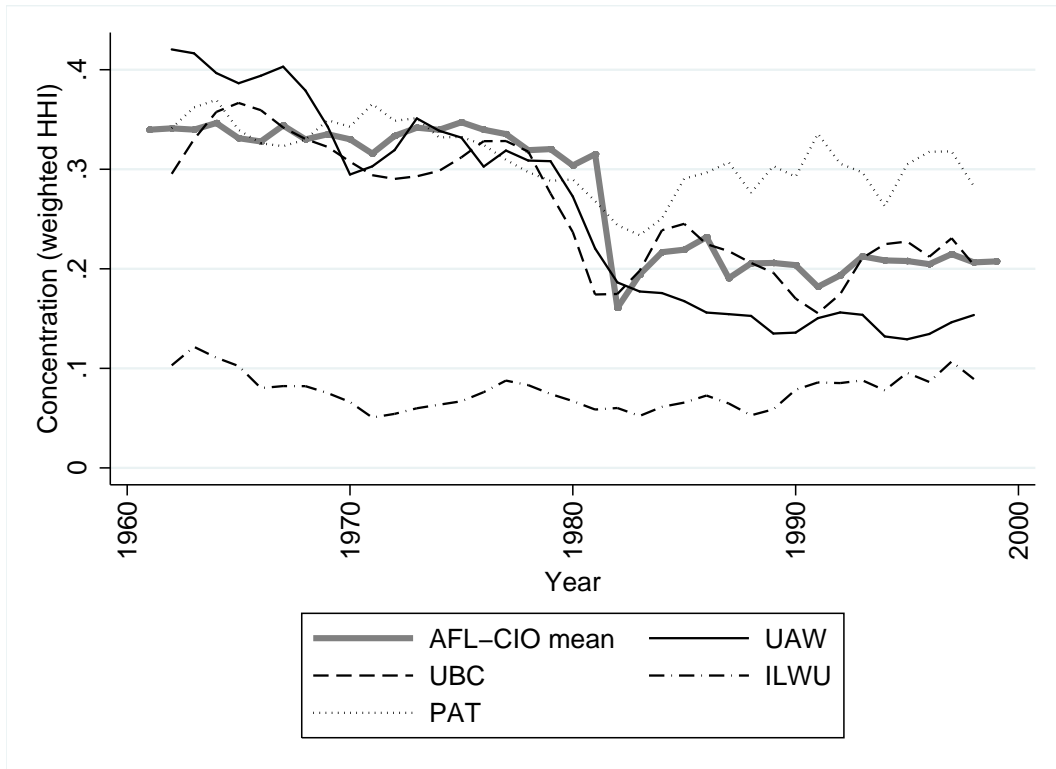


Figure 2: Industrial concentration of organizing attempts for the AFL-CIO and selected unions, 1961–1999. (Union records are three-year moving averages.)

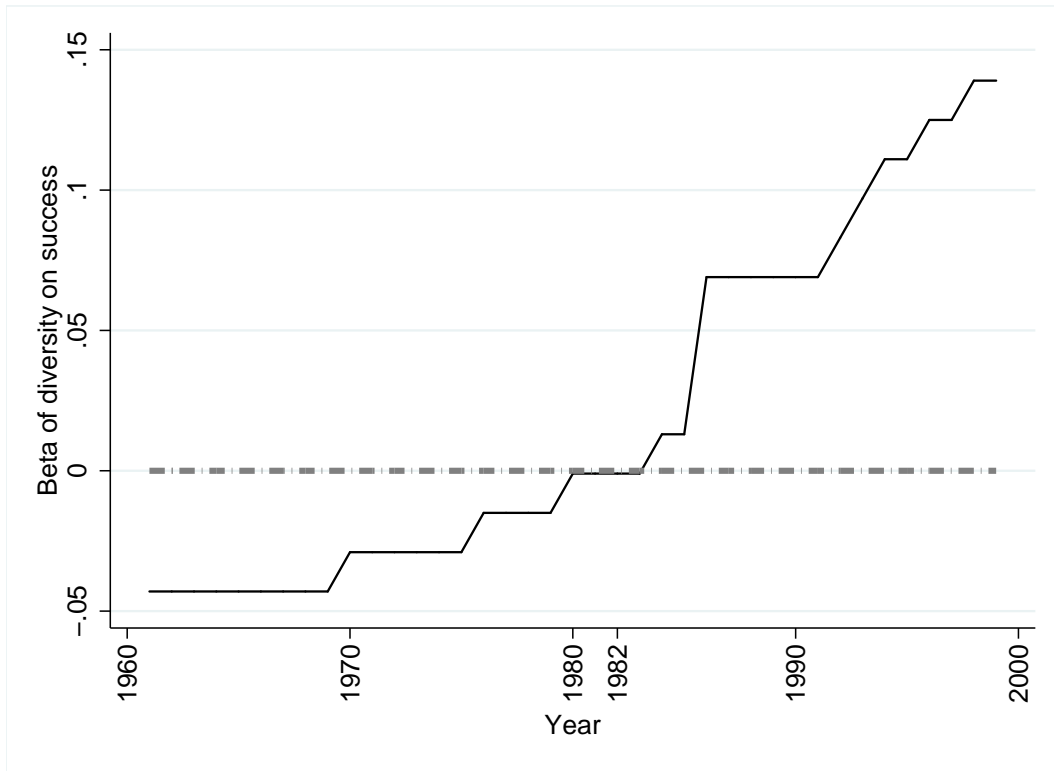


Figure 3: Estimated effect of increasing industrial diversity of union organizing drives on organizing success, 1961–1999. For each year, the calculated value is the percentage difference in the probability of winning a drive between a union whose diversity or organizing equals 1 and a union whose diversity equals zero.

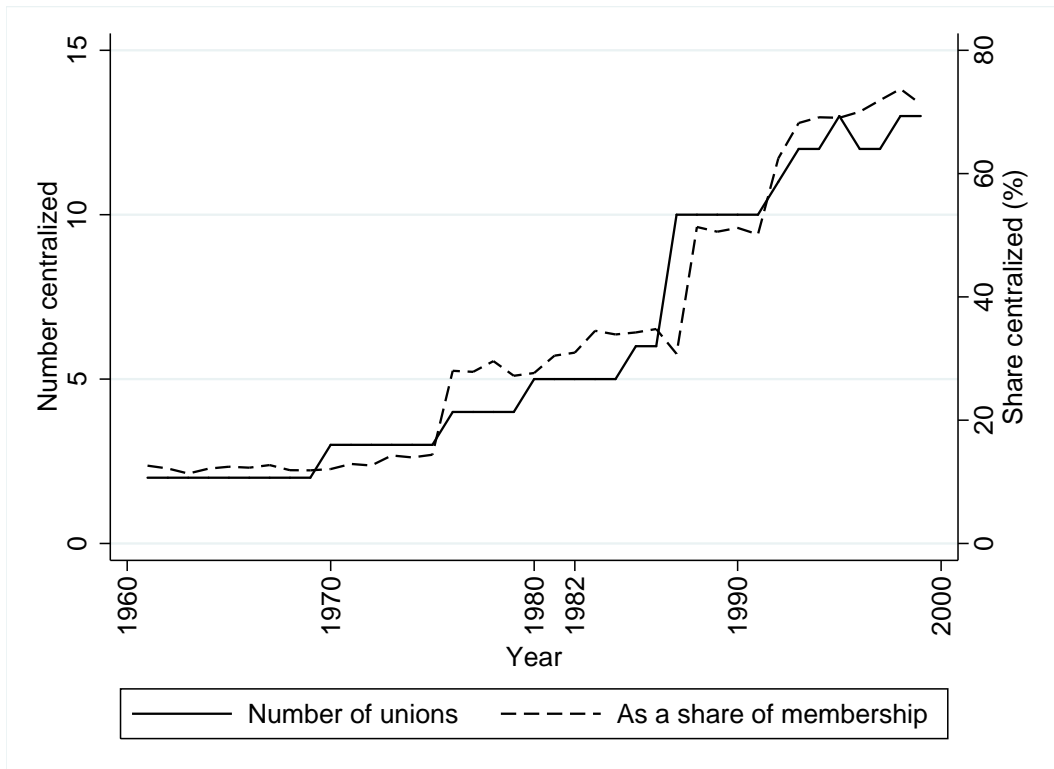


Figure 4: Unions with centralized organizing departments: raw number and as a share of AFL-CIO membership, 1961–1999.

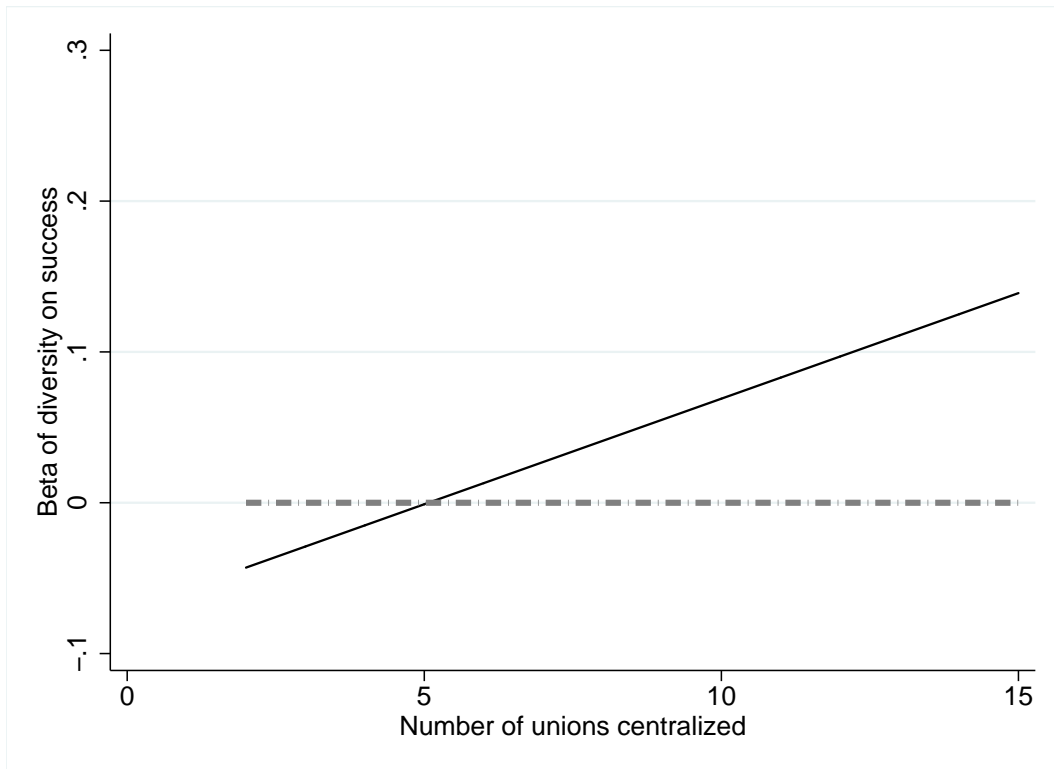


Figure 5: Estimated two-way interaction between diversification of organizing and the number of unions with centralized organizing.

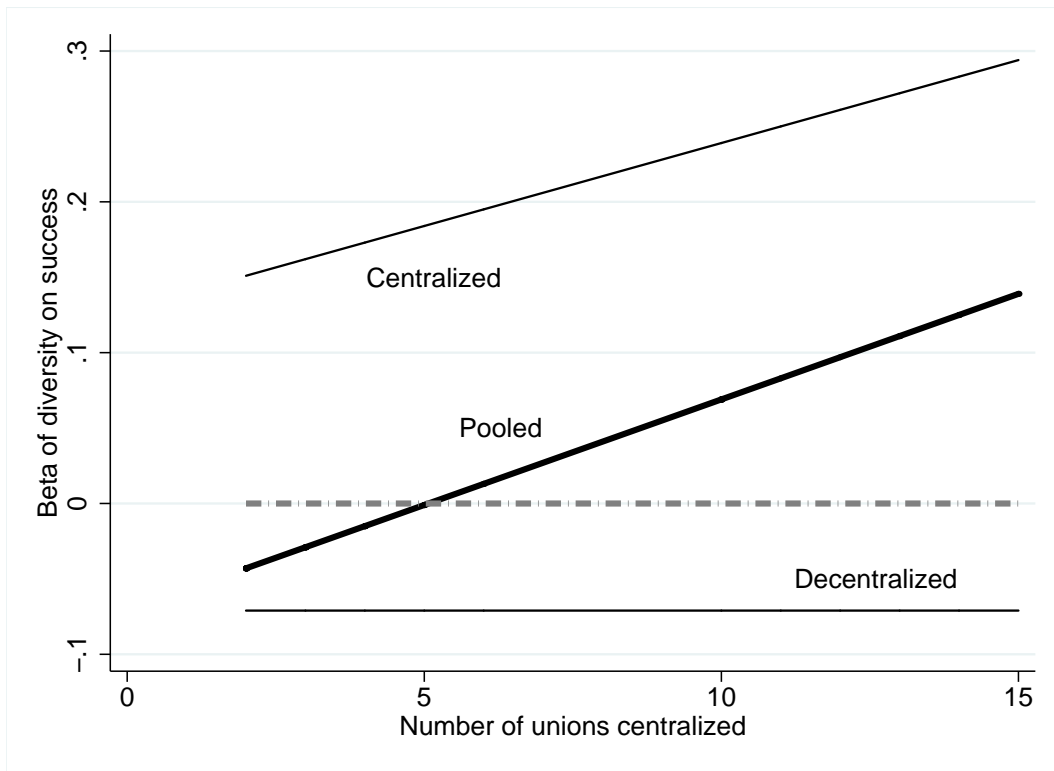


Figure 6: Estimated three-way interaction between diversification of organizing, the number of unions with centralized organizing, and a union's adoption of centralized organizing practices.

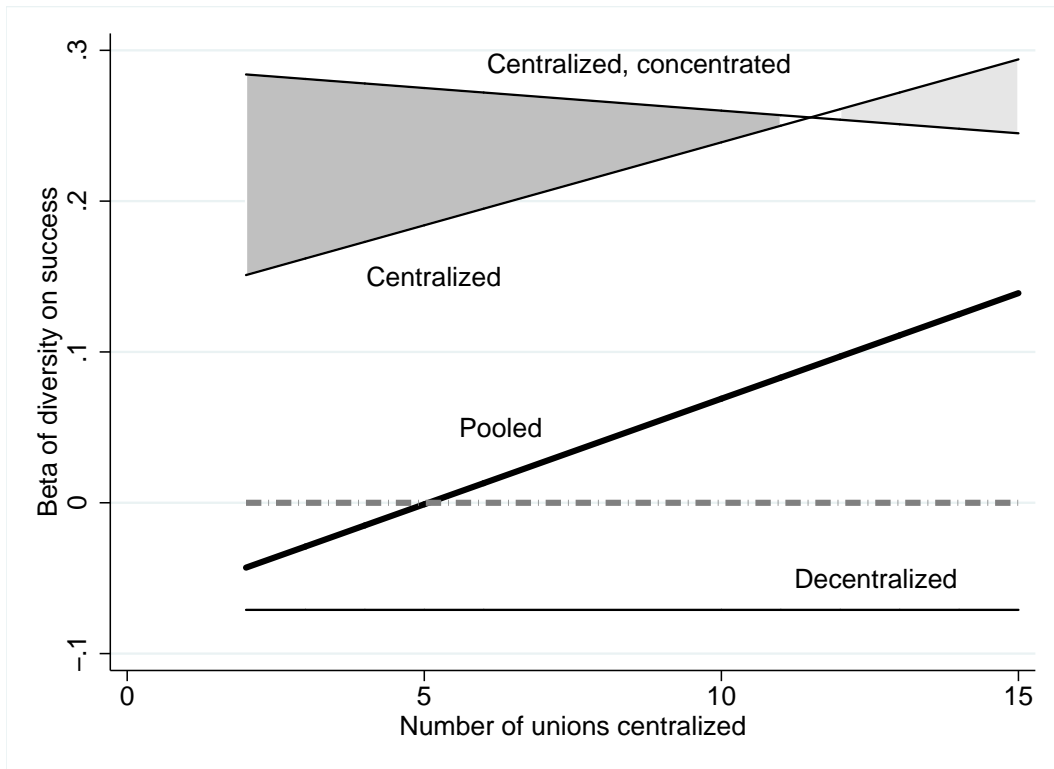


Figure 7: Comparison of diversity's effects on win rates for centralized, diverse organizers and centralized, concentrated organizers, as a function of the number of unions with centralized organizing.

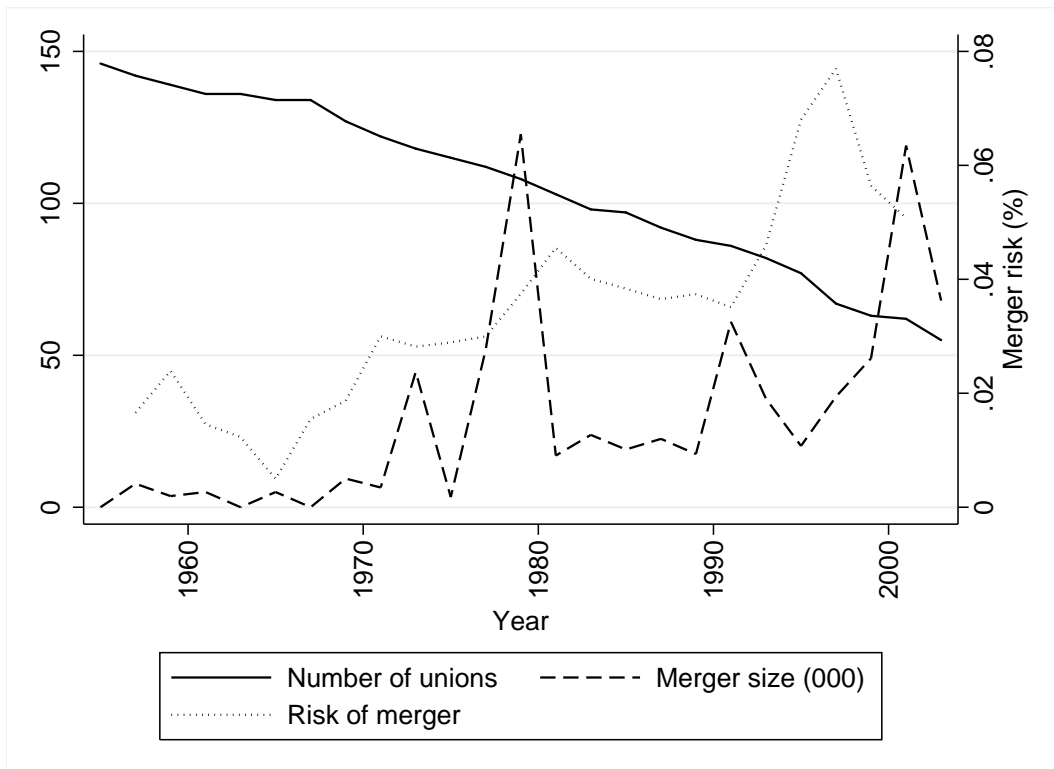


Figure 8: Number of unions, average merger size and merger risk (6-year moving average), 1957–2003

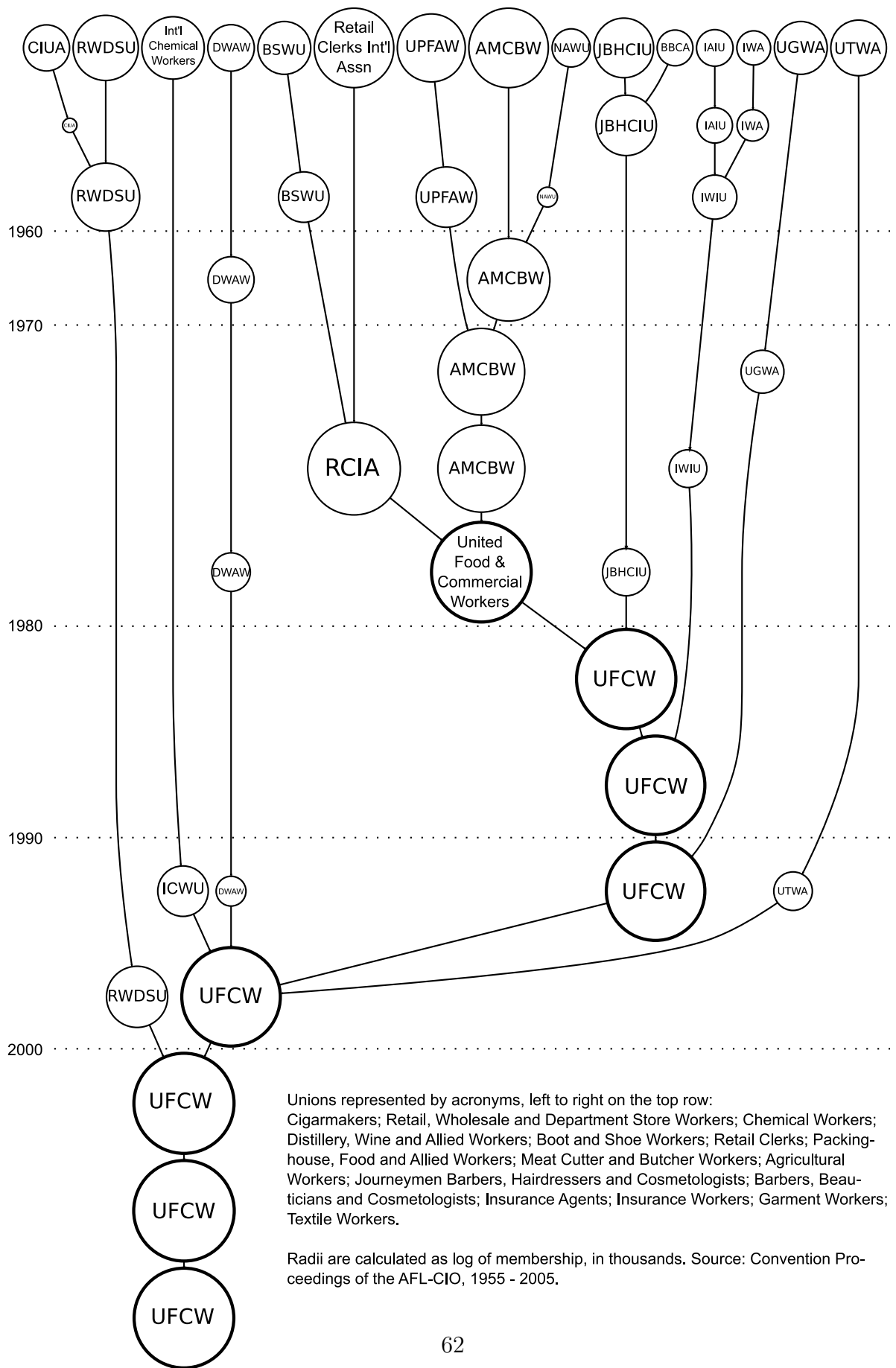


Figure 9: Mergers in the United Food and Commercial Workers lineage, 1955–2005

Table 1: Variables and hypotheses

H	Variable	Direction	Substantive interpretation
<i>Main effects</i>			
1	(D)iversity	–	Violating jurisdiction carries a penalty
2	(C)entralization	+	Centralized organizing is more successful
3	(N)umber centralized	+	Win rates rise with the number of unions centralized
<i>Two-way interactions</i>			
4	D × C	?	Centralization reduces penalties from diversity;
5	D × N	?	<i>Ambiguous depending on number of adopters</i> Penalties from diversity fall as more unions centralize organizing; <i>Depends on whether union has itself centralized</i>
6	C × N	?	Benefits of centralization increase as more unions centralize; <i>Benefits should only accrue when organizing is diversified</i>
<i>Three-way interaction</i>			
7	D × C × N	+	Penalties from diversity fall faster for centralized unions as more unions centralize

Note: The same proposed main and interactive effects are hypothesized for professionalization as for centralization.

Table 2: Probit models of union representation-election victory, 1961–1999, controlling for centralization

Variable	Model						
	I	II	III	IV	V	VI	VII
(D)iversity		-0.083*** (0.024)	-0.082*** (0.026)	-0.086*** (0.028)	-0.080** (0.033)	-0.076** (0.032)	-0.071* (0.033)
Diversity ²		0.053*** (0.012)	0.054*** (0.011)	0.053*** (0.012)	0.050*** (0.011)	0.043** (0.020)	0.044* (0.018)
(C)entralized			0.046*** (0.012)	0.099** (0.049)	0.384*** (0.106)	0.280*** (0.121)	0.292* (0.126)
(N)o. cent.			-0.185*** (0.007)	-0.189*** (0.008)	-0.187*** (0.008)	-0.023*** (0.009)	
No. cent. ²			0.012*** (0.000)	0.012*** (0.001)	0.012*** (0.001)	0.011*** (0.001)	
D × C				-0.016 (0.015)	-0.121*** (0.038)	-0.088** (0.043)	-0.090* (0.043)
D × N				0.001 (0.001)	-0.001 (0.002)	-0.001 (0.002)	-0.001 (0.001)
C × N				-0.003 (0.003)	-0.008*** (0.003)	-0.018*** (0.008)	-0.033* (0.012)
D × C × N					0.011*** (0.004)	0.011*** (0.004)	0.014* (0.005)
Union F.E.						Yes	Yes
Year F.E.							Yes
Disaffiliated	-0.113*** (0.020)	-0.112*** (0.020)	-0.090*** (0.020)	-0.090*** (0.020)	-0.084*** (0.020)	-0.022 (0.035)	-0.021 (0.038)
Core industry	0.023*** (0.009)	0.021*** (0.009)	0.001 (0.009)	0.001 (0.009)	0.001 (0.009)	0.001 (0.009)	0.001 (0.009)
Union rivalry	0.006*** (0.001)	0.006*** (0.001)	0.003*** (0.001)	0.003*** (0.001)	0.002*** (0.001)	0.002*** (0.001)	0.002* (0.001)
Ind. size	0.028*** (0.007)	0.028*** (0.007)	0.025*** (0.007)	0.025** (0.009)	0.026** (0.009)	0.025** (0.009)	0.025* (0.010)
Ind. conc.	0.043** (0.019)	0.043** (0.019)	0.039** (0.019)	0.039* (0.020)	0.038* (0.020)	0.038* (0.020)	0.038* (0.020)
Unit size	-0.134*** (0.003)	-0.134*** (0.003)	-0.139*** (0.003)	-0.139*** (0.003)	-0.140*** (0.003)	-0.139*** (0.003)	-0.139* (0.003)
Union size	0.016** (0.006)	0.013* (0.007)	0.013* (0.007)	0.012* (0.007)	0.012* (0.007)	0.012* (0.007)	0.012* (0.007)
Right to work	0.029*** (0.011)	0.029*** (0.011)	0.036*** (0.011)	0.036*** (0.011)	0.036*** (0.011)	0.033*** (0.011)	0.033* (0.012)
No. drives	0.000*** (0.000)	0.000*** (0.000)	0.000*** (0.000)	0.000*** (0.000)	0.000*** (0.000)	0.000*** (0.000)	0.000* (0.000)
Constant	0.296*** (0.014)	0.329*** (0.020)	0.881*** (0.029)	0.889*** (0.032)	0.878*** (0.033)	1.061*** (0.040)	1.069* (0.042)
N	86299	86299	86299	86299	86299	86299	86299
LL	-58292	-54269	-50114	-50314	-47909	-47622	-47212
Pseudo R ²	0.04	0.06	0.07	0.07	0.09	0.09	0.10