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# Organizing and Democracy: Understanding the Possibilities for Transformative Collective Action

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## Keywords

organizing, collective action, mobilization, social movements, democracy

## Abstract

Democracy requires collective action—but not all forms of collective action are the same. Scholars need a more coherent intellectual infrastructure to differentiate distinct forms of collective action and to identify the kinds of collective action that enable democracy. We distinguish between two types of collective action: organizing, which seeks to transform individuals and groups into effective agents who can shape public outcomes, and mobilizing, which seeks to aggregate and articulate preferences in the public sphere with no explicit focus on individual or organizational change. We review work identifying the dimensions of possible transformation at the micro, meso, and macro levels, and existing evidence for it. We urge scholars to study organizing separate from (and in comparison to) mobilizing and suggest possible research strategies and questions. In doing so, we aim to provide a foundation for future research on organizing and its relationship to democracy.

# INTRODUCTION

Making democracy work requires collective action (Bunce 2000, Carugati & Levi 2021, de Vries et al. 2023, Putnam 1993, Woodly 2022). Yet, many scholars have pointed out the challenges of engaging people in collective democratic action, given people's natural proclivities toward short-sighted, self-interested and parochial behavior and the tendency of collectives to advance in-group interests at the expense of the common good (Berman 1997, Kaufman 2002). Indeed, much empirical research on the likelihood of transforming people's inclinations in ways that make collective democratic action possible has been sobering, revealing bleak possibilities for social and behavioral change (Achen & Bartels 2016). Further, history demonstrates that collective action can lead to both democratic and antidemocratic outcomes, cultivating or inhibiting the individual and collective capacities needed for democratic life (Berman 1997, Lichterman & Eliasoph 2014). The normative challenge of promoting prodemocratic collective action, then, entails understanding how to channel natural human tendencies toward the common good to create a more inclusive, responsive, and pluralistic public sphere (Carugati & Levi 2021, Levine 2022).

The successful pursuit of such normative aims requires a more coherent intellectual infrastructure to differentiate distinct forms of collective action and to understand how to foster the kind of collective action that makes democracy possible. Such an infrastructure demands a clear analytic understanding of if, when, and how collective action transforms individuals and groups and how frequently those changes support or detract from the functioning of democracy. To date, the analytic evidence is mixed. Some studies identify circumstances where collective action has an array of impacts on individuals, communities, politics, policy, and culture (Amenta et al. 2010, Gause 2022, Gillion 2020, Wasow 2020). Others, however, find limited impacts, arguing that individuals are resistant to change regardless of new information and experiences (Achen & Bartels 2016), groups primarily aggregate existing preferences of better-resourced individuals (Schlozman et al. 2018), and political institutions represent and respond to constituent action in limited ways (Baumgartner et al. 2009, Gilens & Page 2014).

In this review, we posit that the lack of clarity in the scholarly literature is at least partly due to conceptual conflation. Not all approaches to collective action are the same. Different forms of collective action have distinct possibilities for fostering change at micro (individual), meso (group), and macro (public sphere) levels. Here, we distinguish between two frameworks for understanding collective action: (*a*) organizing, an approach to collective action that seeks to change individuals and groups into effective actors in the public sphere; and (*b*) mobilizing, an approach that conceptualizes collective action as a process of aggregating and expressing preferences without an explicit focus on changing individuals or groups. Leading organizers have long made this distinction in their practice, and we argue here that it has scholarly value as well.

Although some previous work has noted this distinction (Han 2014, McAlevey 2016, Woodly 2022), most scholarship treats organizing and mobilizing as equivalent forms of collective action. Indeed, easily measured tactics—campaigns developed, coalitions built, social media posts liked, funds raised, candidates endorsed, voters turned out, protest events attended—could emerge from either approach. Mobilizing, however, is more common in the contemporary era (especially in the United States) because it fits more neatly than organizing within current technological, economic, and organizational infrastructures (Karpf 2012, Skocpol 2003, Tufekci 2017). Although some studies that conflate organizing and mobilizing measure and analyze the effects of both simultaneously, most are likely to capture (and thus reveal) the impacts of mobilizing by default, thus missing the potentially unique causes and consequences of organizing and the possibly distinct relationship of organizing to the functioning of democracy.

In the absence of clear conceptual distinctions between organizing and mobilizing, the scholarship identifying possible changes to individuals and groups driven by organizing has been scattered

across multiple literatures. Our goal here is to assemble and review these disparate strands of research on organizing and to provide a foundation for future work on the impacts of different forms of collective action on democracy. It is important to note that in practice, organizing and mobilizing can work in complementary ways within one collective action effort (Han 2014); many organizers deploy mobilizing tactics. The conceptual distinction remains crucial, however, because the ways organizing can transform individuals and groups can be obscured if the distinct strategic logics of organizing and mobilizing are not accounted for.

We begin our review by defining organizing and distinguishing it from mobilizing. Next, we introduce scholarship from multiple disciplines that discusses organizing and illustrate the points of connection and separation among those fields. We then review research that identifies the dimensions of change at the micro, meso, and macro levels that organizing might drive—but mobilizing likely does not—and existing empirical support for each. Building on this foundation, we propose methodological, conceptual, and empirical directions for future research that studies organizing apart from mobilizing and in explicit comparison to it. We hope that a clearer conceptual distinction between organizing and mobilizing will allow for both a more robust analytic understanding of these different forms of collective action and more effective normative efforts to bring about better-functioning democracies through collective action.

## WHAT IS ORGANIZING?

Organizing has been defined in various, overlapping ways, often connected to particular constituencies or traditions, including community-based organizing (Alinsky 1971, Warren 2001), union organizing (Ganz 2009, McAlevey 2016), social movement organizing (Morris 1984, Woodly 2022), and faith-based organizing (Wood 2002). The unique practices, definitions, and purposes of organizing defined in these literatures developed in tandem with the writing and praxis of leading activist intellectuals, who have long articulated the distinctions and shaped the formation of intellectual traditions extending them. For example, Ella Baker made an essential distinction between organizing, which comprised the "spadework" of developing local leaders and building local activist communities (Payne 2007, p. 73), and mobilizing, which meant the sporadic but intense periods of "mass action" in dramatic events (Inouye 2022, p. 538). This article attempts to locate these distinctions in scholarship to equip researchers with understandings that help them to study and make sense of work that organizers have long undertaken.

For the purposes of this review, we broadly define organizing as an approach to collective action that seeks to transform individuals and groups into actors (or, to use organizing terminology, to develop leaders) able to effectively pursue shared goals in the public domain. While organizing may lead to mass participation, its determining feature is not scale, but rather the recognition of individual and group transformation and the intention to bring it about. In doing so, organizing opens possibilities for enabling democracy. Put another way, organizing refers to efforts to develop agentic civic actors (individuals and leaders equipped to articulate, seek, and negotiate their goals and purposes in the public sphere), connected to durable, accountable constituencies as a pathway for turning available resources into the power needed to drive sociopolitical change (Ganz 2024, McAlevey 2016, Morris 1984, Woodly 2022). Although organizing, like other forms of collective action, does not always succeed, the intention to develop individuals and groups (and the implications of their transformations for opportunities for macro-level impacts) is conceptually relevant for scholarship because it yields a distinct strategic logic (e.g., Ahlquist & Levi 2013, Han et al. 2021).

Organizing operates at three levels to enable micro (individual), meso (group), and macro (public sphere) change. At the micro level, effective organizing engages individuals in practices and public relationships that try to shape the motivations, emotional capabilities, beliefs, narratives,

and identities that drive action (Inouye 2022, Polletta & Jasper 2001), build individuals' capacities for expressing voice in the public sphere (Mayer 2014, McAdam 1986), develop their understanding and analyses of political problems and power (McAlevey 2016, Warren 2001), enhance their leadership skills (Ganz 2024), and equip them to engage with others to realize shared interests (Christens 2019, Woodly 2022). At the meso level—whether in movements, organizations, coalitions, networks, campaigns, or communities—organizing develops constituencies (with leaders), mechanisms of accountability, and structures that distribute power and facilitate deliberation, negotiation, and sustained engagement (Baggetta et al. 2013, Ganz 2024, Ostrom 1990) while building capabilities for and commitments to sustained collective action that render the whole greater than the sum of its parts (Levine 2022). By shaping interpersonal processes through which people develop new connections, organizing seeks to shape individual and collective consciousness in ways that move people beyond parochial identities toward a pluralistic sense of collective fate (Ahlquist & Levi 2013, Carugati & Levi 2021). At the macro level, by developing individuals and groups that can act more effectively in the public domain (Andrews et al. 2022), organizing creates a political sphere that can be more inclusive, representative, and responsive as a broader array of constituencies become able to exercise voice (Carugati & Levi 2021). At all levels, then, organizing has the potential to deepen democracy.

The outcomes organizing seeks at each level are distinct from those sought by mobilizing, which is an approach to collective action without an explicit focus on or expectation of individual or collective transformation (Han 2014, McAlevey 2016, Woodly 2022). Mobilizing treats individuals as consumers, attempting to create products (opportunities for action) that activate latent (or overt) motivations and capabilities. Mobilizing efforts elicit and aggregate people's preferences, then create ways to express them in the public sphere. At the micro level, mobilizing identifies individuals with certain beliefs and preferences and tries to activate them to express public voice by matching them with opportunities for action. At the meso level, mobilizing aggregates those existing preferences, leveraging existing social networks and group identities in an effort to spur participation in events and activities. Mobilizing efforts seek change at the macro level by amplifying people's existing preferences in the public sphere (instead of transforming the individuals and groups involved, as in organizing).

While organizing and mobilizing are conceptually distinct, it can be difficult to empirically distinguish them because, at first glance, they appear to share many tactics and tools. For example, when pursuing mass mobilization, both organizers and mobilizers will use broadcast advertising, phone banking, door-to-door canvasing, and social media to reach large numbers of people and generate participation. There are important differences, however, in the strategic context that shapes when and how such tools and techniques are used by mobilizers and organizers (Han 2014).

Mobilizers typically use tactics and tools for engagement in transactional ways to achieve the largest scale at the lowest cost to both the mobilizers and the participants. Organizers, though they may use the same set of mass mobilization tactics, focus on upstream and downstream opportunities to build individual and collective capacity that has long-term consequences for people's engagement with and analysis of their own role in public life. Rather than treating response (phones answered, doors opened) or turnout (people at events, voters at the polls) as ends in themselves, organizers see opportunities to start people on a path to deeper engagement.

Some tactics and tools do distinguish organizing from mobilizing. Organizers are more likely to invest time in processes of identifying community needs, strengthening interpersonal relationships, or building capabilities for people to engage with political processes independently of paid staff seeking to engage them in any one effort (Christens 2019). Even here, though, empirical distinctions must be carefully assessed. Techniques like one-to-one meetings, "snowflake" structures

(group structures that create interdependent working relationships among members), and public narrative workshops are likely to be evidence of organizing (Ganz 2024, McKenna & Han 2014)—and yet, the proof is still in how those techniques are used. For any tool or tactic to fully embody an organizing approach, it must fit into complex sequences of actions and activities seeking to cultivate people and communities as agents of public life.

Scholars have previously made distinctions between types of collective action that may seem like those we are making here between mobilizing and organizing—such as distinguishing efforts that are "thick" versus "thin," time-consuming versus quick, or offline versus online (e.g., Klandermans 2007, Oser et al. 2022). While related, such distinctions do not fully capture our definitions of organizing and mobilizing. While organizing may often be thick, time-consuming, and offline (and mobilizing thin, quick, and online), these distinctions categorize particular actions rather than the way those actions work in concert with others. A time-consuming, offline action might still be transactional and disconnected while a brief, online action might be part of a complex sequence of actions.

## WHERE ORGANIZING APPEARS IN RESEARCH LITERATURES

Although it has not always been called "organizing," organizing practices are visible throughout human history and across a range of different cultures, from practices of self-governance in Indigenous communities to the first stirrings of Athenian democracy; from anticolonial, revolutionary episodes in France to abolition movements in America and around the world; from recent transnational democracy movements to the global climate movement (Bringel & McKenna 2020, Tilly & Tarrow 2015). Although a long and hallowed tradition of transnational and global organizing exists, we focus here on organizing's development in the United States, with a primary focus on literature in the twenty-first century in an effort to wrap our scholarly hands around this large, varied tradition.[1] From a practical perspective, organizing has emerged in the United States as a recognized professional field with a coherent set of practices that organizers, movement leaders, and civil society actors teach in consistent ways (Petitjean 2023).

From a scholarly perspective, the study of organizing in the United States appears across a range of academic disciplines and covers a diverse set of substantive research topics. To identify the main fields of research studying organizing, we conducted a search in Web of Science. That search yielded 1,491 records focused on organizing that relate to the United States, including studies on a range of substantive topics. **Figure 1** maps the distinctive clusters of terms that emerge from mapping the co-occurrence of keywords in the data set. The scholarly fields with more than 100 records in the data set included sociology (10.33% of records); industrial relations and labor (9.59%); social work (6.82%); public, environmental, and occupational health (6.69%); history (5.67%); education and educational research (5.03%); and political science (4.89%). The analysis shows that organizing also appears in research in urban studies, interdisciplinary bodies of scholarship related to community empowerment, race and ethnic studies, and elsewhere.

Within this mapping of the literature, we identify four areas of study that focus particularly on the processes and practices of organizing in ways that distinguish it from mobilizing. Many studies talk about the effects of organizing, or the role of organizing in broader campaigns, but they tend to black-box the processes and practices of organizing itself. Without opening

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[1]See **Supplemental Appendix A**, "Extended Reference List," for a more comprehensive list of research on organizing in addition to the literature cited in this article. This extended reference list includes additional focus on cross-national literature and scholarly writings from earlier time periods.

Supplemental Material >

**Figure 1**

Areas of study and co-occurring terms in the data set ($n = 1{,}491$), 1967–2023. Mapping the organizing literature reveals four main areas of study: industrial relations and labor (*green*), social movement studies (*blue*), community organizing and community empowerment (*red*), and studies of gender, race, ethnicity, and inequality (*yellow* and *purple*). Figure created using VOSviewer version 1.6.18 (Van Eck & Waltman 2010); see Shoshan & Oser (2023) for a detailed description of the methodology used for this search. Further details on the citation mapping data and methods used to inform this section are found in **Supplemental Appendix B**, and replication files are in Harvard Dataverse (**https://doi.org/10.7910/DVN/WHU1IE**).

Supplemental Material >

that black box, we cannot differentiate the distinct strategic logic that underlies organizing and its potentially unique consequences. This review primarily examines research that unpacks the practices and processes of organizing. We found this kind of scholarship mainly in four areas:

- Industrial relations and labor: Research on worker organizing has long focused on the mechanisms through which a mass constituency can be organized to come together to gain leverage and power in relation to powerful decision makers (Ahlquist & Levi 2013, Ganz 2009, McAlevey 2016).
- Social movement studies: This research examines the movements, organizations, and campaigns seeking social change of many kinds (Tilly & Tarrow 2015). These movements operate across the political spectrum and in ways that both promote and undermine democracy. While some of these movements have advocated for recognition and representation of

historically marginalized groups (e.g., Morris 1984), others have used organizing to exclude groups from the polity and extend advantages for the privileged (Blee & Creasap 2010).

- Community organizing and community empowerment: An interdisciplinary body of work examines community organizing as a coherent professional practice. Much of this work builds on the praxis of famed organizer Saul Alinsky (1971) and its adaptations and legacies (Christens 2019). Studies of community organizing have also focused on advancing social and political change in particular domains, such as health, education, housing, and faith institutions (Lipsky 1969, Warren 2001, Wood 2002, Wood & Fulton 2015).
- Studies of gender, race, ethnicity, and inequality: The relationship of organizing to the study of inequality along multiple dimensions is threaded throughout the research identified above because many organizing efforts have sought to make society more just by turning disempowered individuals and communities into self-directed agents of public life. Notably, organizing has been studied for many years in literature on Black politics, ethnic studies, and related fields that are not necessarily reflected in the citation map because of historically encoded biases in citation practices (see, e.g., Rogers 2023). We seek to include those traditions in our review as well.

In addition, we note that some studies are focused on settings that include elements of organizing but have not necessarily discussed them as such. For example, evangelical megachurches (Han & Arora 2022) usually do not frame their own activities as organizing, per se—and yet, organizing dynamics are visible in close investigations of these organizations' activities.

We divide our review of this research into three levels to identify how organizing seeks transformation at the micro (individual), meso (group), and macro (public sphere) levels—and the evidence for such transformation. Throughout, our goal is to understand what is known about the ways in which organizing is or is not effective at each level. With a particular focus on questions related to work in political science and sociology, we try to integrate understandings of organizing across disciplines, and within each level of analysis, to build the case for a coherent research agenda.

## THE MICRO LEVEL: TRANSFORMING INDIVIDUALS

Research examines the way both mobilizing and organizing shape people's capacities for public life. Research on political participation (of any kind) shows that it can develop people's civic skills (Verba et al. 1995) and increase their political knowledge (Allen & Light 2015), and that participation early in life can be habit forming (Jennings et al. 2009). Scholarship on organizing, however, identifies additional dimensions of individual change that are part of processes of leadership development. Organizing moves people from being consumers of political action to producers of it, shaping their ability to act as strategic political agents. When people participate in organizing, "the result is not *to do a thing* but *to become the kind of person who does what is to be done*" (Woodly 2022, p. 128, emphasis original).

We focus on three dimensions of transformation through organizing at the micro level: (*a*) the skills and capacities people need to be effective public sphere actors, (*b*) the kinds of relationships people form and their ability to construct committed public relationships, and (*c*) attitudes, interests, identities, and emotions that emerge from the new political consciousness that organizing engenders.

### Developing Capabilities for Public Sphere Action

At the heart of the individual transformation is a process of capacity building that organizers often think of as leadership development (Ganz 2009, 2024; McAlevey 2016; Warren 2001). The capacities that people develop in organizing include skills that many forms of civic participation generate,

such as speaking publicly about one's views, working effectively with others, and knowing where and when to advocate for an issue (Verba et al. 1995). Organizing, however, also requires that people develop an emotional capacity for risk (Han et al. 2021, McAdam 1986), build narratives that call others to action (Ganz et al. 2023, Mayer 2014), strategize under conditions of political uncertainty (Levine 2022), commit to sustained participation accountable to a broader group of people (Ganz 2024, McKenna & Han 2014, Wood 2002), and contextualize their own engagement in a broader analysis of power and the political sphere (Woodly 2022). A key leadership skill for organizing is the ability to foster action and public relationships in a way that develops more leaders by taking responsibility for drawing others into ongoing activity (Ganz 2024, Woodly 2022).

## Turning Interpersonal Interactions into Public Relationships

Relationships (of any kind) are distinct from episodic interactions. Interactions become relationships when both parties have an expectation for recurrent, future interactions and derive meaning from those interactions (August & Rook 2013). Through organizing, people form what we call "public relationships," as distinct from what scholars have defined as "exchange relationships" or "social relationships" (Blau 1964, Cook & Rice 2006). In exchange relationships, the parties specify the nature of the exchange upfront so that people contribute to the relationship knowing what value they will extract in return. In a social relationship, both parties contribute to the relationship without specifying what they will get in return, and each party considers the other's needs and wants. Public relationships formed in organizing are grounded in interests (like exchange relationships), but instead of focusing on exchanges designed to serve each party's individual self-interest, they are based on mutual commitment and oriented toward negotiating and serving shared interests (more like social relationships) in the public domain (Christens 2019, Ganz 2024).

A robust and growing body of research on social networks and practices like get-out-the-vote campaigns examines the kinds of interpersonal interactions that facilitate and enable participation and collective action (Campbell 2013, Green & Gerber 2019). While this research examines the social ties that underlie political action, it generally does not differentiate between interactions and relationships, nor distinguish exchange relationships, social relationships, and public relationships—likely because those characteristics are much harder to observe empirically. As a result, syntheses of research on political behavior argue that interpersonal interactions have mixed effects and do not always durably shape people's beliefs, attitudes, or willingness to act (Achen & Bartels 2016).

Research on organizing, however, shows how it changes people's interpersonal interactions into committed public relationships oriented around shared action. Explicit organizing practices, like one-to-one meetings, are mechanisms organizers use to encourage people to articulate their interests and then act accordingly, including committing to acting together in ways that make them accountable to each other (Ganz 2024, McAlevey 2016, McKenna & Han 2014, Payne 2007, Warren 2001). Those relationships are necessary for organizing to endure, because they sustain people's commitment to ongoing action even when the circumstances of collective action become complex (Ganz 2009, Harris 1999, Payne 2007). Further, they create a setting in which ongoing exploration of values, strategy, and action can unfold (McAdam 1986, Morris 1984, Polletta 2002, Speer & Han 2018, Woodly 2022).

## Shaping Attitudes, Interests, Identities, and Emotions

Empirical studies of organizing show that it can shift a person's or constituency's understanding of their identities and interests (Ahlquist & Levi 2013, Ganz 2009, Morris 1984, Munson 2008, Polletta & Jasper 2001). For example, a comprehensive study of labor unions and racial groups revealed a causal effect of organizing on attitudes, with union organizing leading to a reduction of

racial resentment (Frymer & Grumbach 2021). Other research shows that organizing can shape attitudes, empathy, and moral regard through interpersonal and collective interactions or rituals (Kalla & Broockman 2020, Yudkin et al. 2022), which can then help forge new personal identities (McAdam 1986, Warren 2010). Narratives that connect personal experiences to collective struggles expand and replenish the wells of emotion needed to initiate and sustain engagement (Ganz 2024, Ganz et al. 2023).

These findings run contrary to much other research on people's political motivations, beliefs, identities, preferences, and interests, which tends to treat those orientations as less malleable (Druckman 2022) and exogenous to their political involvement (Jennings et al. 2009). Organizing makes those orientations endogenous to the act of participation itself, to shape the perspectives and frames people use to make sense of information about the world—to develop their political analysis, as Woodly (2022) argues—and create contexts for ongoing discussion and reflection about their own sense of themselves as public actors (Inouye 2022, Polletta 2002). In doing so, organizing seeks to shape people's consciousness, a phenomenon that theorist Stuart Hall describes as developing people's visions of the kind of person they want to become and drawing on those future visions to shape people's choices in the present (Morley & Chen 1996).

## THE MESO LEVEL: TRANSFORMING GROUPS AND COMMUNITIES

At the meso level, organizing seeks to transform groups and communities. Conventional research often treats collective action as the additive sum of individual actions. Such research examines multiple dimensions of aggregation, including the structure and consequences of the social networks people construct (Campbell 2013), the material and nonmaterial resources needed for such collectivities to overcome free-rider problems (Olson 1965), and the formations that emerge to hold collective entities together (Van Dyke & McCammon 2010).

Organizing, however, additionally seeks to generate collective action that develops collective properties that are independent of the way in which individual actions were aggregated (Woodly 2022, Yudkin et al. 2022). Wood & Fulton (2015), for example, describe how deliberative practices enabled a multiracial, multifaith community to negotiate divergent interests and form a network that articulated a new set of common interests. In this section, we identify two dimensions of transformation that organizing seeks at the meso level, namely to (*a*) shape collective identities, affective bonds, and interests to orient them toward a common good, and (*b*) develop group capacity for shared action by building mechanisms for governance, or the sharing of power in ways that are accountable to competing groups.

### Orienting Collective Identities, Bonds, and Interests Toward the Common Good

Ransby (2003, p.16) describes Ella Baker's commitment to organizing in a way that would "[infuse] new meanings into the concept of democracy" and build people's "collective power to determine their lives and shape the direction of history." The collective that Baker built sought to create its own source of meaning, a phenomenon that many scholars have studied (in part) under the umbrella of collective identity. The concept of collective identity represents the dynamic process through which the collective actor referred to as a movement constitutes itself (Polletta & Jasper 2001). The development of a collective identity involves a process of negotiating a shared understanding of who forms the "we" that emerges in organizing efforts; deliberation to bridge differences across that group; and repeated interactions, socializing, and rituals that can build affective bonds of solidarity (Morris 1984, Orleck 2005, Wood & Fulton 2015). Collective identities can be strengthened by a process of preparing leaders to articulate and communicate shared values through a public narrative that fosters collective identities toward the common good (Ganz

et al. 2023). A recognition that organizing practices can strengthen and expand collective identities means that such collective actors do not pre-exist organizing practices and instead emerge in the organizing process (Polletta & Jasper 2001).

Other research examines the way organizing can also foster the development of a community of shared interest and a sense of collective fate (Ahlquist & Levi 2013, Carugati & Levi 2021). This work focuses on the Tocquevillean expectation that individuals' sense of self-interest can be expanded to include the interests of other individuals and communities. This "self-interest rightly understood" [Tocqueville 1835–1840 (1954), Vol. 2, pp. 129 ff.] allows people to see their fates as interlinked with those of others, providing a basis for collective action in pursuit of those more-broadly-defined interests.

## Building Accountable Governance Mechanisms

Another body of research examines the governance practices and structures of collective action that can negotiate among distinct interests, distribute power across those interests, and make decisions to solve common problems. Doing so is not easy. As scholars have long noted, governance structures can erect hierarchies that concentrate power in the hands of oligarchs (Michels 1915) and sap movements of their ability to disrupt the status quo (Piven & Cloward 1977). On the other hand, scholars have also noted that "flat" structures and consensus-based decision making can produce long, drawn-out debates (Polletta 2002), unclear resolutions (Staggenborg 2020), stalled efforts at action (Tufekci 2017), and the rise of informal cliques of de facto oligarchs (Freeman 1970). Organizing seeks to construct governance structures that remain responsive to constituents by enabling constant renewal while also effectively advancing strategic aims (Ganz 2024, McAlevey 2016).

Research shows how organizing efforts within specific organizations self-consciously seek to allocate power through transparent governance structures and create open mechanisms for constituent participation and control, such as carefully designed meetings, open information sharing, competitive elections for leaders, participatory deliberations, interest negotiations, and collective decision making (Baggetta et al. 2013, Levine 2022, Ostrom 1990). Such arrangements are often thought of as the structures and processes of democratic self-governance. For example, the Chicago Teacher's Union, during its efforts to rebuild power in the early 2000s, expanded the roles of school-level delegates, hosted large-scale delegate meetings to discuss contracts and strikes, arranged for rank-and-file members to read the full text of proposed contracts while on picket lines, and held broad-based, high-turnout elections (McAlevey 2016). Beyond the practices of self-governance within specific organizational structures, research on movement infrastructure shows the importance of power-sharing and accountability mechanisms in coalitions that connect organizations with their own distinctive internal structures (Morris 1984, Staggenborg 2020, Van Dyke & McCammon 2010).

Historical research also offers evidence of federated organizational structures enabling sustained collective action (Skocpol 2003). Local organizations recruited new members, built relationships, developed leaders, and took local actions that connected them to higher-level units at county, state, regional, or national levels. These meso-level structures of cross-class civic life in the United States forced organizations to be simultaneously responsive to their constituents and connected to broader national debates—but such structures have weakened over time. Skocpol (2003) argues that new political opportunities and institutional legitimation processes led civic actors to focus on centrally managed lobbying using new technologies and sources of financial support. These new structures wrought groups and communities that can spur sporadic action but cannot sustain engagement—that is, they largely stopped organizing and resorted to only mobilizing. The advent and development of modern communication technologies have further

altered the landscape for translocal organizing and leadership development in ways that scholars are still tracing empirically (Karpf 2012, Tufekci 2017). Some research to date suggests that structures that can change communities into sustained, accountable collective actors have declined.

## THE MACRO LEVEL: TRANSFORMING THE PUBLIC SPHERE

If organizing seeks to be transformative at the individual and group levels, it also seeks to change politics and the public sphere by making claims on the state and other macro-level entities. In this review, we think about the relevant macro level as the way in which the meso-entities described in the prior section engage externally with key institutions and actors in their bid for achieving social or political change in the public sphere. At the macro level, both mobilizing and organizing assume that collective action can create collective power as a means to achieve both voice and influence (Ulbig 2008). Copious research has established that collective action (typically with no delineation of organizing from mobilizing) can, at times, drive things like policy change, the election of new representatives, and the setting of political agendas (Amenta et al. 2010). Of course, organizing is not always successful in achieving macro-level outcomes—a fact it also shares with mobilizing. Organizing and mobilizing are, nevertheless, still arguably distinguishable at the macro level because organizing seeks to achieve its goals in ways that not only shape visible policy and political outcomes (e.g., winning elections, passing policies) but also create a durable infrastructure of individual leaders and collective entities that persist beyond any one win to create an ongoing source of power. Thus, even when organizing campaigns fail to achieve their stated goals, they have greater potential to remake politics and the public sphere in other ways (Amenta & Polletta 2019, Andrews et al. 2022, Skocpol 2003).

We identify two dynamics where greater spillover from organizing can reshape the public sphere: (*a*) altering the composition of the public sphere by cultivating more, new, different, and underrepresented voices; and (*b*) generating responsiveness and representativeness from political, cultural, and economic institutions by better equipping communities to hold those institutions accountable.

### Altering the Composition of the Political Sphere

Some research examines the way macro-level politics can be remade through organizing practices that introduce new and different voices to politics across institutional settings (Dawson 2001, Jones-Correa et al. 2018). For example, Terriquez (2011) finds that immigrant parents' engagement in a labor union can serve as a gateway to political engagement related to their children's schools. Similarly, organizing efforts have, at times, added the voices of undocumented immigrants, people with criminal records, unhoused people, sex workers, farm workers, and other historically excluded groups to political processes. Of course, when organizing brings additional people into the public sphere, it does not always bring new—or even democratically supportive—voices. Organizing has also often been used to increase participation by the socially advantaged, including by groups seeking to reduce or eliminate the participation of others (Blee & Creasap 2010). Regardless of which direction any particular organizing effort pushes, however, by successfully drawing participants into politics and leveraging their collective power, organizing recreates the composition of the public sphere itself.

Beyond adding individuals and constituencies, organizing can also play a transformative role in culture and society by (re)defining what the political sphere should encompass and what groups should be considered constituencies within it (Amenta & Polletta 2019). For example, organizing played important roles in inventing "Hispanic" as a US Census category and a political constituency (Mora 2014) and in creating "the environment" as a policy stakeholder that individuals and groups should speak for (Gottlieb 1993).

## Generating Institutional Responsiveness and Representativeness

A substantial body of recent research demonstrates the limited (and declining) influence of ordinary people in politics (Elsässer & Schäfer 2023), including research on lower-income constituencies inside and outside the United States (Gilens & Page 2014) and across a range of participatory mechanisms such as campaign contributions, political parties, interest groups, and social movements (Witko et al. 2021). Related research on interest groups shows no linear relationship between various organizational resources (e.g., money, numbers of people, commitment) and political power (Baumgartner et al. 2009). Other research (primarily on protest) provides evidence that protest can be effective, at least for some types of political acts, for certain policy issues, and in specific contexts (e.g., Chenoweth 2021, Gause 2022, Gillion 2020, Leighley & Oser 2018, Wasow 2020). These conflicting results may emerge, in part, because this body of research does not differentiate between different forms of collective action, thus making it hard to see differences between the outcomes of organizing and mobilizing.

Some research that is clearly grounded in organizing, however, does suggest its potential effects. Unions, while not universally organizers, are more likely to engage in organizing than many other collective action organizations (McAlevey 2016). Comparative research has shown that democratic countries with high levels of unionization have more generous, egalitarian policy regimes than societies with less union presence (Ahlquist 2017, Hooghe & Oser 2016), and periods of higher unionization in US history were associated with more representative, responsive, and generous governance (Galvin 2016). These findings suggest that union organizing not only shapes employment arrangements but also produces macro-level impacts on the public sphere (Ahlquist 2017). At a subnational level, community organizing in US cities has regularly garnered policy responses from local governments (Orr 2007), and Putnam's (1993) classic Italian study found that regional governments surrounded by more active civic associations were more responsive to their constituents. While not all those Italian associations had robust organizing traditions, many did, including a significant number of labor unions, trade guilds, and socialist political parties (Putnam 1993). In sum, evidence suggests that organizing has the potential to make democratic institutions more representative of and responsive to their constituents.

# AN ORGANIZING RESEARCH AGENDA

By clarifying the conceptual distinctions between organizing and mobilizing, and reviewing disparate literatures about the practice and impacts of organizing, this article seeks to highlight dimensions of possible behavioral, social, and societal changes that are part of organizing and each in need of dedicated scholarship. We hope that scholars building on the work we have reviewed can further specify contributions of organizing to the functioning of democratic systems.

To move research forward, we encourage greater precision in terminology. Organizing has conceptual boundaries, but prior research has often applied the term organizing to a wide range of activities that seek only aggregation or activation instead of individual and group transformation. This has happened both because many organizations have spoken the language of organizing while not bearing out true organizing efforts and because scholars have used the term interchangeably with several others. We caution against using the term organizing as shorthand for a wide range of collective action tactics without an accompanying understanding of how those tactics are applied. The presence of any given tactic (e.g., one-to-one meetings) does not, on its own, qualify an effort as organizing. Media reports and participant surveys rarely offer a sufficient level of detail to identify whether the users are deploying the strategic logic of organizing (Baggetta & Bredenkamp 2021). Relying on such data to identify organizing versus mobilizing runs the risk of regularly miscategorizing cases, resulting in analyses that wash out real differences between the two.

To study organizing in a way that accurately applies the term, scholars should draw on multiple kinds of data. A rich tradition of qualitative, case study research can continue to reveal the complex sequences of actions that turn activities into opportunities for transformation and the many, varied ways the organizing approach manifests in different contexts (Ganz 2009, McKenna & Han 2014, Payne 2007). Carefully designed comparative case studies can provide a broader sense of the commonalities across organizing contexts and the ways that contexts shape the design and trajectory of organizing efforts. Network data can enable an examination of relational interactions to reveal more about strategy (e.g., Han et al. 2021). Some larger-scale quantitative assessments of collective action may need to be combined with additional data sources to elucidate the distinctions between organizing and mobilizing. For example, when media reports are used to study protest events, organizations could be identified from the source reports. Interviews with informants from each identified organization could then be used to learn if organizations were using organizing or mobilizing approaches. That information could help explain trends in turnout for events and public sphere outcomes afterward.

New data collection efforts must also be explored. Innovations in automated text coding and sentiment analysis (Ressler et al. 2024) may allow for texts created by and about organizations to be consistently coded for evidence of organizing. Direct, observational data collection can also be scaled up to capture large numbers of organizations—including both their public actions and their ordinary, internal meetings and events—by using systematic social observation techniques (Baggetta & Bredenkamp 2021). Experimental interventions embedded in such studies can provide further leverage for understanding how and when transformations occur (e.g., Han 2016).

Developing research designs and data sources that accurately and consistently identify organizing can elucidate outstanding research questions to pursue at the micro, meso, and macro levels.

## Micro

To understand when people's engagement in public life becomes a vehicle for promoting democracy versus undermining it, we have to identify the conditions under which organizing can transform people's parochial interests into the shared interests needed for democracy to work—and, correspondingly, the conditions under which organizing becomes a carrier for democratic versus authoritarian tendencies. What kinds of experiences enable such shifts? What backgrounds, personal resources, or prior experiences make it more or less likely that someone exposed to organizing efforts will develop prosocial attitudes, interests, or beliefs? How long do newly constructed attitudes of tolerance, commitments toward pluralism, and understandings of common interests endure?

Research differentiating between different kinds of interactions and relationships is especially important for understanding the conditions under which organizing can change people and groups. For example, in the context of political action, how do the affective and emotional experiences of people in public relationships differ from social interactions or from purely exchange or social relationships? What kinds of practices are most likely to engender the creation of public relationships necessary for shaping people's orientations and behaviors toward democracy? What are the consequences of the formation of such relationships?

## Meso

Since organizing is an approach to collective action that seeks to alter individuals and groups, many of the possibilities for meso-level transformation are grounded in the practices of democratic self-governance. These practices include people coming together to articulate interests, deliberate across difference, negotiate distinct and shared collective interests, make decisions, hold

each other accountable, and, essentially, cocreate solutions to problems (Allen 2023, Levine 2022). Democratic theorists have called such phenomena "conjoint action" (Dewey 2012) or "action in concert" (Arendt 2013). More empirical research is necessary, however, to unpack its observable properties and to understand how it contributes to self-governance and democracy. With the exception of some recent psychological research that examines phenomena like collective effervescence (Yudkin et al. 2022), we largely lack conceptual tools for articulating how collectivities are distinct from mere additive aggregations of individual behaviors and attitudes (e.g., Perrin 2015). Building collective identity and collective narratives is part, but not all, of the collective outcome. Articulating these conceptual distinctions could allow for identification of the conditions under which collective action can develop independent properties that go beyond the sum of individual parts. In addition, in a moment when models of democratic representation are being challenged around the world, more research is needed at the meso level that pays attention to how to foster effective structures of self-governance, and how to spread notions of accountability.

### Macro

A key question at the macro level is under what conditions organizing contributes to democracy, rather than undermining it. Because existing research on the relationship of collective action to public outcomes does not differentiate between different types of action (e.g., Amenta et al. 2010, Chenoweth 2021), our understanding of the effects of organizing is limited. How often is organizing successful in gaining recognition for constituents, adding new policy concerns to the public agenda, or garnering new resources from institutions—and how does that success rate compare to the rate for mobilizing? When does organizing respond to openings in the political opportunity structure versus creating them? Research is needed to identify the forms and patterns of collective action that push institutions and states in prodemocratic or antidemocratic directions, assess the causal directions of these efforts, and illuminate the contextual factors and mechanisms that can clarify the connection between organizing and democracy.

## CONCLUSION

This synthesis of literature on organizing, and its distinction from mobilizing, sought to advance our understanding of collective action by clarifying the dimensions along which organizing seeks to transform at micro, meso, and macro levels. Democracy depends on collective action that engages a broad range of people, develops them into more skilled, confident, vocal agents (as opposed to consumers) of public life, provides more strategic opportunities for communities, and delivers more influence over politics, policy, institutions, and culture. Because democratic systems demand that people accept uncertainty over outcomes in exchange for certainty over process (Bunce 2000), such systems only work if people—not normally inclined toward effective collective action—become equipped, individually and collectively, to productively engage with the process. The work we have reviewed here suggests that organizing can do this by fostering relationships oriented toward shared public sphere action that turn people into capable public actors with an analysis of the world and ways to change it.

There is far more left to uncover. To advance understanding of collective action and democracy, scholars must clarify the forms and strategies that underlie the collective action they are studying, distinctions that we organized under the headings of organizing and mobilizing. In addition, more scholarship is needed on the conditions under which each dimension of possible transformation works—or does not.

While the United States has never approximated the pluralist ideal of democracy, organizing has given visibility, voice, and (at times) power to an array of previously marginalized or oppressed communities (Chenoweth 2021, Ganz 2009). Prominent instances of organizing efforts

that pursue antidemocratic aims (Blee & Creasap 2010) have always existed, and contemporary antidemocratic movements have once again used organizing to undercut, circumvent, or remove the protections of democratic institutions. We nonetheless posit that organizing has the potential to advance normative visions of democracy by seeking the kinds of change described in this article. Even in nondemocratic settings, organizing can create democratic space—and, as Woodly (2022) argues, the spaces in contemporary US society where democracy is most fully realized are engaged in organizing. By distinguishing organizing from mobilizing, and identifying possible dimensions of transformation at the micro, meso, and macro levels, we aim to contribute to an intellectual infrastructure for the study of collective action that supports and inspires the advancement of prodemocracy research and practice.

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