Chapter 4: Variation in the Use of Identity Dimensions as Evidence of Identity Framing

# Introduction

Existing research suggests that organizational identity reflects shared understandings about that which is central, distinctive, and continuous about an organization (Gioia et al., 2013, p 123). Yet identity can also be an important symbol and source of change for organizations striving to adapt to their environment; that is, as long as new identity claims are perceived as legitimate by important stakeholders (Dutton & Dukerich, 1991; Gioa, Schultz, & Corley, 2000; Humphreys & Brown, 2002; Pedersen, & Dobbin, 2006; Ravasi & Schultz, 2006; Boin et al, 2016). The process of building support for new organizational identity claims can therefore be fraught. Organizations and managers must concern themselves with how new claims (mis)align an organization with its environment, and with established understandings of organizational distinctiveness (Dutton & Dukerich, 1991; Humphreys & Brown, 2002; Ravasi & Schultz, 2006).

While it is incumbent upon all organizations to balance these competing pressures to one degree or another, successfully finding an equilibrium between identity-focused change and continuity may be particularly important for nonprofit organizations. Nonprofits face unique challenges in terms of measuring their impact, demonstrating accountability to multiple groups of stakeholders, and remaining mission-focused in the face of what has been called the “survival imperative” (Herman & Renz, 1998; Salamon, 2003; Moulton, & Eckerd, 2012; Flynn, & Hodgkinson, 2013).  This increases the importance for nonprofits of cultivating legitimacy based on the perceived integrity of their organizational identity (Hansmann, 1987; Eikenberry, & Kluver, 2004). How can nonprofits successfully balance environmental pressures to adapt with the need to cultivate an enduring organizational identity?

Scholars have identified at least two strategies that organizations may leverage to support the legitimization of new identity claims. First, research suggests that while the labels and symbols reflecting organizational identity may remain relatively constant over time, their underling meanings may change (Gioia, Schultz, & Corley, 2000; Chreim, 2005; Corley et al., 2006; Gioia et al., 2013). Second, studies also suggest that organizations can incorporate new dimensions to their identity over time (Dutton & Dukerich, 1991; Gioia, Schultz, & Corley, 2000; Corley et al., 2006; Gioia et al., 2013). These strategies make it possible for an organization to remain true to its essence while simultaneously adapting to its dynamic environment

This study examines how these strategies came into play during a significant period of identity-focused change across an important field of nonprofit organizations: the United Way (UW) system. The UW Worldwide is the umbrella organization for approximately 1800 local UW organizations around the globe (United Way, 2016b). Local UW organizations are federated funds, local umbrella organizations that collect community contributions and channel them to affiliated human service nonprofits. The UW system receives more in private donations than any other nonprofit in the United States (Hall et al., 2013). All told, the system distributes close to $4 billion each year, making it the most significant private funder of human services in many local communities across the U.S. (Hall et al, 2013; Gronbjerg et al., 1996). For at least twenty years, however, practitioners and scholars have noted that a key revenue stream for the UW system, workplace giving, is undergoing a transformation with important ramifications for the UW, as well as local communities across the US (Barman 2002; 2006).

Workplace giving, where employees have the opportunity to contribute to nonprofit organizations through employer-sponsored fundraising campaigns, is an important aspect of philanthropic giving in the United States. Workplace giving campaigns in the US traditionally focused almost exclusively on local UW organizations. Since the early 1980’s however, a number of alternative funds have increasingly come to compete with the UW in workplace giving campaigns (Barman 2002; 2006). Alternative funds are federated funds that channel donations to nonprofits serving non-local populations that share a particular purposive commitment (e.g. environmental protection, minority rights, or medical research). The rise of alternative funds has created an unprecedented level of competition for the UW, and legitimized both new institutional logics shaping the field of federated funds in the US, and new identity dimensions to the federated fund as a distinct organizational form (Young, 2001; Brilliant & Young, 2004; Barman, 2002; 2006).

In response to these changes, the UW Worldwide has attempted to implement an extensive campaign of identity-focused change since 2001 through its’ Community Impact initiative (Barman, 2007a; Paarlberg & Meinhold, 2011). Forthcoming research suggests that the Community Impact initiative has shaped both the grant allocation choices of local United Way organizations (Paarlberg & Moulick, forthcoming), as well as other strategic choices made across this important nonprofit system (Paarlberg & Meinhold, 2011). Qualitative empirical research also suggests that the UW Worldwide is seeking to legitimize new organizational identity claims through the Community Impact initiative (Young, 2001; Brilliant & Young, 2004; Barman, 2002; 2006).

This study uses data on descriptive organizational purpose statements from the Combined Federal Campaign (CFC), the workplace giving campaign of the federal government, to examine how such identity-focused change is playing out across the UW system by asking: 1) What identity dimensions are in use across the UW system in the United States? 2) Is there geographic or temporal variation in the way individual local UW organizations use these different identity dimensions to make claims about their organizational identity? 3) Does this geographic and temporal variation suggest that local UW organizations are subject to environmental pressures at multiple levels of analysis that lead them to make divergent claims about their organizational identity?

This study makes several contributions. First, it empirically tests whether the federated fund identity dimensions posited by earlier qualitative research can be detected across a large sample of UW organizational purpose statements. Second, it enhances our understanding of identity-focused organizational change by examining how individual organizations embedded in both a national-level system and distinct local communities incorporate new dimensions into their organization identity over time. Third, given that the national-level organizational field in question is the UW system, the most important private funder of local social services in the country, this study provides insight into changes that will affect many local communities for years to come. Finally, this study makes a methodological contribution to the field of nonprofit studies by employing an under-utilized technique for analyzing textual data such as mission statements: supervised machine learning. Social scientists now have unprecedented access to large sets of textual data (Grimmer, 2015), this study highlights methods conducive to nonprofit research in the era of big data.

The balance of this manuscript is organized as follows. The first section provides a brief overview of existing research on organizational identity, mission and change. This section includes a discussion of the degree to which we might expect mission statements and other public statements of organizational purpose to accurately reflect the organizational identity of nonprofits such as the UW. The following section provides an overview of the historical origins and meanings of the various federated fund identity dimensions referenced above. Next, the CFC data and analytical methods based on supervised machine learning are described in greater detail. Finally, the results of analysis are discussed along with their implications for future practice and research. In brief, several theorized federated fund identity dimensions are in use across the UW system; temporal and geographic variation in the use of these dimensions is readily apparent; and the nature of this variation suggests that local UW organizations face a variety of pressures at different levels of analysis due to the fact that they are simultaneously embedded in national, regional, and local organizational fields.

# Organizational Identity, Mission, and Change

Since Albert and Whetton (1985) first broached the topic of organizational identity, it has been conceptualized in a number of different ways, however several points of convergence do exist (Corley et al., 2006). First, scholars tend to agree that organizational identity is internally focused, yet comparative since it is defined relative to other “more” or “less” similar organizations (Corley et al., 2006). Second, scholars generally agree that identity is at least in part based on the shared understanding of organization members about that which is central, distinctive, and continuous about an organization (Gioia et al., 2013, p 123). The research presented here builds on the conceptualization of organization identity as a social construct, or more specifically, as a claim about an organization’s essence grounded in collective understandings about its distinct history, and culture (Corley et al., 2006; Ravasi & Schultz, 2006). Although scholars debate the dimensionality of organizational identity, some empirical research suggests that it can be multi-faceted (Young, 2001; Brilliant & Young, 2004; Corley et al., 2006; Gioia et al., 2013).

While organizational identity is continuous in nature, research suggests that it can also be an important symbol and source of organizational change (Gioa, Schultz, & Corley, 2000; Glynn, & Abzug, 2002; Ravasi & Schultz, 2006; Boin et al, 2016). There are, however, significant constraints on the new identity claims that organizations can successfully make; specifically, new claims must align with conceptualizations perceived by both internal and external stakeholders as legitimate (Dutton & Dukerich, 1991; Humphreys & Brown, 2002; Pedersen, & Dobbin, 2006). Organizations and managers seeking to legitimize new identity claims must therefore concern themselves with both how new identity claims create narrative (mis)alignment between the organization and its environment, as well as how these claims create (mis)alignment with collective understandings of organizational history, tradition, and culture (Dutton & Dukerich, 1991; Humphreys & Brown, 2002; Ravasi & Schultz, 2006).

This study uses data on descriptive organizational purpose statements to examine variation in identity claims across the UW system. It is therefore important to discuss how such statements of organizational purpose relate to the concept of organizational identity. To do so, we consider the literature on mission statements and their connection to organizational identity.

Mission statements and other succinct descriptions of organizational purpose purportedly reflect organizational identity, yet also serve as a kind of external communication intentionally crafted to shape perceptions of organizational image (Swales & Rogers, 1995; Williams, 2008). Such public statements of organizational purpose can therefore be viewed as organizational identity claims made by leaders targeting external audience to at least some extent. Scholars disagree on the degree to which the identity claims articulated in mission statements align with those socially-constructed by a more broad range of organization members (Koch, Galaskiewicz, & Pierson, 2015; Swales & Rogers, 1995). Interestingly, to a large degree this debate seems to fall along sectoral lines; researchers whose work focuses on for-profit firms tend to argue that mission statements are so generic and decoupled as to be almost meaningless artifacts that should be ignored (Bartkus, Glassman, & McAfee, 2006; Fairhurst, Jordan, & Neuwirth, 1997), while nonprofit scholars take a different view.

Namely, nonprofit scholars tend to see mission statements as important symbols that reflect and reinforce organizational identity, helping nonprofits to formulate strategy, attract and maintain the support of key stakeholders, and achieve organizational goals (see discussion in Koch, Galaskiewicz, & Pierson, 2015, p.510-511). For example, Bart and Tabone (1998) find that mission alignment in nonprofit hospitals positively affects organizational performance. Based on a longitudinal study of a diverse panel of nonprofit organizations, Koch, Galaskiewicz, and Pierson (2015) find that mission statements do in fact reflect the programmatic activities of nonprofit organizations, and that changes to nonprofit mission statements are consistent with changes in program offerings.

Existing research thus suggests that nonprofit mission statements are more than just claims made by organizational leaders targeting external audiences; they align with collective understandings of core activities and shape performance outcomes. This suggests that mission statements reflect nonprofit identity to at least some degree, and that changes to these public descriptions of organizational purpose may reflect evolving understandings of a nonprofit’s identity. From this broad discussion of organizational identity, mission and change, we now turn to the specific case of identity-focused change across the UW system.

# Identity-Focused Change at the United Way

As mentioned earlier, the workplace giving context, which is dominated by federated funds like the UW, has witnessed dramatic change. Existing research on nonprofit adaptation in the context of workplace giving suggests that there are now multiple dimensions to federated fund identity. Each of these identity dimensions reflect different institutional logics, and shapes understandings of the legitimate federated fund role(s) (Young, 2001; Brillaint & Young, 2004). The five contemporary federated fund identities described by Brilliant and Young (2004) include: fiscal intermediary, economic regulator, community problem solver, social-change agent, and charitable fund manager. Their work uses historical and organizational literature, as well as qualitative data collected from a limited number of organizations to inductively build theory, which has yet to be tested over a large sample of federated funds (Young, 2001; Brilliant & Young, 2004). Among its other contributions, this study is a first step toward testing their theory of multi-dimensional federated fund identity over a large sample of local UW organizations.

The UW system is one of the oldest fields of federated funds in the country. Changes in the context of workplace giving have resulted in increasing competition for the UW from alternative funds, as well as the legitimization of new institutional logics that legitimize new federated fund identity dimensions (Young, 2001; Brilliant & Young, 2004; Barman, 2006). In response to these changes, the UW Worldwide has undertaken an extensive campaign of identity-focused change since 2001 through the Community Impact initiative (Barman, 2007; Paarlberg & Meinhold, 2011). While the Community Impact initiative is grounded in the traditional federated fund identity dimensions of community problem solver, fiscal intermediary, and economic regulator, it also promotes the incorporation of the new identity dimension of social change agent (Young, 2001; Brilliant & Young, 2004; Gallagher, 2005). We would therefore expect to find evidence of each of these identity dimensions in the descriptive organizational purpose statements of a large sample of local UW organizations. Before we can determine whether or not this is the case, we first need to understand each identity dimension in more detail.

## *Fiscal intermediary*

Federated funds emerged during the Progressive era, during which reformers stressed the values of rational management and efficiency (Hall, 2006). Federated funds were created to eliminate duplication and competition in local fundraising by efficiently collecting and re-allocating community resources (Barman, 2006; Hall, 2006). The federated fund identity of fiscal intermediary therefore reflects the institutional logic of rational management and efficiency. Fiscal intermediary is probably the most traditional federated fund identity dimension. We can therefore expect that:

**H1**: The identity dimension of *fiscal intermediary* will be reflected in the descriptive organizational purpose statements of a large sample of local UW organizations through the use of terms such as “fundraise”, “gift”, “donation”, “allocation”, “efficient”, and “collect.”

## Community problem solver

Also during the Progressive era, management, social work, and policy analysis came to be viewed as professional occupations for trained experts (Hall, 2006). Reformers argued that community issues should be studied, and solutions identified and implemented by qualified experts rather than voluntary groups and elected officials working in an ad-hock manner on pet projects (Barman, 2006; Hall, 2006). The federated fund identity dimension of community problem solver originally reflected this normative logic (Young, 2001; Brilliant & Young, 2004; Barman, 2006). It has evolved to include an emphasis on the collaborative identification of community problems as well as possible programs and services to address community needs. For example, the Community Impact initiative requires local UW organizations to work with local human services nonprofits and community members to set community service priorities to guide their work as community problem solvers. We can therefore expect that:

**H2**: The identity dimension of *community problem solver* will be reflected in the descriptive organizational purpose statements of a large sample of local UW organizations through the use of terms such as “service”, “program”, “need”, “problem”, “solution”, and “collaboration.”

## Economic regulator

The identity dimension of economic regulator is based on the financial and normative power accumulated by federated funds, particularly the UW, by the middle of the twentieth century. By this time, UW affiliation had come to serve as a kind of “good housekeeping seal of approval” for nonprofits, increasing their legitimacy in the eyes of potential donors (Pfeffer, & Leong, 1977; Provan, 1982; Barman, 2006). This normative leverage allowed federated funds to become economic regulators. In this role, federated funds serve as watchdogs by collecting data on their nonprofit affiliates or “members,” evaluating their performance, and adjusting their resource allocations based on performance measures.

**H3**: The identity dimension of *economic regulator* will be reflected in the descriptive organizational purpose statements of a large sample of local UW organizations through the use of terms such as “partner” or “member” organizations, “quality”, “evaluation”, and “effective”.

## Social change agent

Since the early 1980’s, alternative funds have gained traction in both public and private sector workplace giving campaigns (Barman, 2006; 2007; Brilliant & Young, 2004; Cordes et al., 1999; NCRP, 2003). Alternative funds have also challenged the institutional logic of bureaucratic efficiency undergirding the traditional federated fund identity dimensions described above. As described earlier, alternative funds exist to channel support to nonprofits addressing a variety of purpose rather than place-based issues such as environmental protection, minority rights, or medical research (Barman, 2006). By uniting groups around a common purpose and helping to foster a sense of collective identity, alternative funds have redefined the meaning of “community” to encompass more than simply identification with a particular geographic locale (Barman, 2002; 2006).

What is more, by framing advocacy as a “solution” to the problems faced by community members, alternative funds have expanded the repertoire of legitimate “community problem solving” activities beyond direct service provision to a local area (Barman, 2002; 2006). This strategic orientation venerates action to address the root causes of social problems through advocacy and social change as opposed to treating the symptoms of a given problem by providing direct services on an ongoing basis.

The new federated fund identity dimension of social change agent thus reflects a new institutional logic shaping the field of federated funds; one that conceives of community as collective identity based on shared purpose, and promotes a strategic orientation geared toward advocacy, mobilization, community building, and social change (Young, 2001; Brilliant & Young, 2004). Through the Community Impact initiative, the UW Worldwide is attempting to incorporate this new dimension into the organizational identity of the UW. For example, the Community Impact initiative requires local UW organizations to change the way they measure their impact; or, as the United Way puts it, “Rather than measuring our success in dollars raised [to fund social services], we measure our success in actual lives changed” (United Way, 2016a). We can therefore expect that:

**H4**: The identity dimension of *social change agent* will be reflected in the descriptive organizational purpose statements of a large sample of local UW organizations through the use of terms such as “advocate”, “change”, “impact”, and “long-term” solution.

## Charitable fund manager

In the role of charitable fund manager, federated funds serve as “investment” advisers to individuals with philanthropic “accounts.” The identity dimension of charitable fund manager is thus grounded in federated fund relationships with individual high-end donors, rather than groups of employees participating in a workplace giving campaign, the context from which this data is drawn. It is therefore reasonable *not* to expect to find evidence of this identity dimension in the descriptive purpose statements of local UW organizations in a workplace giving campaign.

**H5**: The identity dimension of c*haritable fund manager* will not be reflected in the descriptive organizational purpose statements of a large sample of local UW organizations.

Up until this point, this discussion has focused on developing hypotheses related to our first research question: 1) What identity dimensions are in use across the UW system in the United States? These hypotheses can be tested by hand coding a portion of local UW organizational purpose statements and then using supervised machine learning to code the remaining statements. This methodology is described in more detail in the following section. First, however, we ask the reader to recall two additional research questions: 2) Is there geographic or temporal variation in the way individual local UW organizations use these different identity dimensions to make claims about their organizational identity? 3) Does this geographic and temporal variation suggest that local UW organizations are subject to environmental pressures at multiple levels of analysis that lead them to make divergent claims about their organizational identity? To develop hypotheses related to these research questions, we draw broadly upon open-system theories of organizational change.

## Temporal and geographic variation

Open-system theories (i.e. resource dependence theory, population ecology, institutional theories, etc.) emphasize the role of external pressures in driving and constraining organizational change (Scott, 1995; Powell & Steinberg, 2006). While open-system theories vary in their conceptualization of the level of agency actors may demonstrate in the face of broader environmental pressures, as well as on the mechanisms shaping organizational change (Galaskiewicz & Bielefeld, 1998), they share several points of congruence.

First, these perspectives emphasize the significance of organizational fields or environments. DiMaggio and Powell (1983, 148) define an organizational field as, “those organizations that, in aggregate, constitute a recognizable area of institutional life.” Second, they hold that organizational change is affected by evolving conditions in one or more organizational fields, and is not based solely on internally-focused management decisions (Ashworth, Boyne, & Delbridge, 2007). Finally, organizational survival is determined by the degree to which an organization is a good fit for its environment.

Recent research based on open-system theories has highlighted the importance of both macro (i.e. national, or regional) context as well as mezzo, or local context in shaping organizational change (Marquis, & Battilana, 2009; Marquis, Glynn, & Davis, 2007). Each local UW organization is embedded in organizational fields at the national, regional, and local levels of analysis. We would therefore expect that each local UW organization may be subject to somewhat different contextual pressures depending on the various organizational fields in which it is embedded. For example, as mentioned earlier the UW Worldwide has been leading the implementation of Community Impact initiative across the US system since 2001. This creates a national-level pressure across the field of local UW organizations to implement identity-focused organizational change over time. We would therefore expect that:

**H6**: Across the national-level UW system, use of the social change agent identity dimension will increase over time, while use of the traditional identity dimensions of fiscal intermediary, community problem solver, and economic regulator will diminish.

At the mezzo, or regional level, Elazar and Schneider have suggested that regional political and philanthropic culture may shape the behavior of individual and organizational actors. In his book, *The American Mosaic,* Elazar (1994) argues that spatial, historical, and cultural factors have shaped political culture in the United States. Elazar posits the existence of three distinct subcultures that shape citizen perspectives on government and civil society across the United States: individualistic, moralistic, and traditionalistic.

For example, Elazar posits that people from traditionalistic regions tend to have a negative view of professional public bureaucracy because it depersonalizes government and may undermine the existing social order. People living in moralistic regions tend to prefer non-profit provision of community services as a means of engaging community members and ensuring that institutions stay responsive to local residents. In addition to shaping citizen preferences, Elazar further argues that political subculture shapes citizen behavior in the public arena. In moralistic regions, for example, participation of the full populace is valued, while in individualistic and traditionalistic regions, politics is the domain of professionals, or elites respectively. If political subculture shapes citizen preferences for public service delivery mechanisms, as well as the role defined for citizens in the design and delivery of public goods and services, then it makes sense that subculture would also shape perceptions of nonprofit organizations, and philanthropic behavior.

Schneider (1996) recognized this connection early on, and developed a theory of philanthropic subcultures based on Elazar’s typology. As conceived by Schneider, for example, individualistic cultures value philanthropic choices that further personal goals, and expect non-profit administrators to maximize efficiency as they would be expected to do if they were working at a for-profit business. People from moralistic cultures tend to believe that government, nonprofits, and individuals all have a moral duty to address social injustices. Finally, people from traditionalistic cultural regions, concentrated in the South, are more likely to support non-profits that provide charity in a manner that does not disturb the existing social order. Based on this discussion, we might expect that use of different identity dimensions across local UW organizations might therefore vary based on the political-philanthropic subculture in which a given organization operates.

**H7**: Local UW organization use of different identity dimensions will vary based on political-philanthropic subculture.

Finally, there is also good reason to expect that local-level organizational fields would lead to variation in the use of identity dimensions across the UW field. For example, the open-system theory of population ecology posits that new organizational forms, such as alternative funds, are more likely to be founded in resource-rich areas such as large cities (Hannan, & Freeman, 1984; Singh, & Lumsden, 1990). What is more, alternative funds may also be more likely to operate in large cities to better support nonprofit affiliates engaged in advocacy. This suggests that local UW organizations that operate in metropolitan areas might face more competition from alternative funds, and might therefore be subject to higher local-level pressures to adapt. We might therefore expect that:

**H8:** Local UW organizations operating in large metropolitan areas will use different identity dimensions in their organizational purpose statements than their counterparts operating in less urban areas.

In order to test the hypotheses developed above, we will use data from a national workplace giving campaign, and a combination of methodological approaches that facilitate the analysis of textual data. From this discussion of theory, context, and descriptive hypothesis development, we therefore turn to a description of our data before moving on to a discussion of our methods of analysis and findings.

# Data

As previously mentioned, the data used for this analysis come from the Combined Federal Campaign (CFC), the workplace giving campaign of the US federal Government. The CFC is one of the largest and most successful workplace giving campaigns in the world. According to the CFC webpage (OPM, 2014), the campaign’s mission is, “to promote and support philanthropy through a program that is employee focused, cost-efficient, and effective in providing all federal employees the opportunity to improve the quality of life for all.” Each year, the CFC collects donations from federal civilian, postal and military personnel totaling millions of dollars. The campaign is organized into over 200 area campaigns geographically delineated along county lines, and covering the entire geographic US as well as its affiliated territories.

To participate in one of the area campaigns, an organization must be demonstrate a "substantial" program presence within the campaign's geographic boundaries. In order to be eligible to participate in the CFC, a nonprofit must have 501(c)(3) status, and file an application the includes their most recent 990, as well as detailed information their auditing, governance and program functions. Nonprofits have the option to participate in the CFC as an independent organization affiliated with the independent charities fund, or as part of a federated fund like a local UW organization. As of 2004, the OPM reports that over 20,000 nonprofits worldwide participated in the CFC each year.

As this overview suggests, CFC data have a number of strengths in terms of addressing the research questions at hand. First, the national CFC office collects data from area campaigns across the country making it possible to study variance across time and space for a number of variables. Secondly, the CFC is a relatively “closed” campaign; nonprofits are forbidden from engaging in supplemental marketing directly to employees, beyond the information published in the official CFC charity book. The CFC charity book is organized by federated fund (individual nonprofits are listed under the federated fund with which they are affiliated). Each federated fund and individual nonprofit listing also includes a 25 word organizational purpose statement. This suggests that both federated fund affiliation and the content of organizational purpose statements are important pieces of information in terms of communicating with potential employee-donors. In turn, this suggests that nonprofits and federated funds are likely to pay attention to the content of their organizational purpose statements. From this broad discussion of the data used for this analysis, we now turn to a more detailed discussion of analytical methods including variable operationalization.

# Variable Operationalization and Methods

## Phase I: Identifying local UW organizations that participated in the CFC

Databases were acquired from the OPM office responsible for managing the CFC containing information on the nonprofits that participated in the CFC between 2012 and 2016. The website of the UW Worldwide (United Way, 2016b) was then scraped to create a database of local UW organizations, and their Employee Identification Numbers (EINs) and their operating addresses. EIN’s were used to match local UW organizations identified through the UW website with organizations participating in the CFC between 2012 and 2016. During this period, several local UW organizations were eliminated and/or consolidated. In order to identify these organizations, the OPM databases were mined. Several observations were missing 25 word statements, and were dropped for the purposes of the analysis. A total of 3080 observations were used to conduct the analysis presented here.

The operating address information for local UW organizations identified through the US website were readily available. Google was used to identify the city and state in which local UW organizations identified through data mining if that information was not ready available through the OPM databases. Information on the location of local UW organizations and the Texas A&M University GeoInnovation Center website were then used to geocode each UW observation. This process resulted in a database containing the EIN, legal name, and 25 word statement for local UW organizations, for each year that they participated in the CFC between 2012 and 2016.

## Phase II: Hand coding of random sample

A random sample of 350 observations (approximately ten percent) was drawn across all years for all observations with complete data. The decision to draw a sample across all years rather than within each year was made to help maintain a level of consistency in coding across observations from different years. Each observation was coded for the presence or absence of the identity dimensions described earlier (i.e. fiscal intermediary, community problem solver, economic regulator, social change agent, and charitable fund manager. For example, an observation was coded as “1” for *fiscal intermediary* if its’ associated organizational purpose statement reflected this identity dimension, and “0” otherwise. The presence or absence of each identity dimension was coded separately for all observations in the sample since the presence of one identity dimension does not necessarily negate the possible presence of a different identity dimension.

**Table 1** presents exemplary statements coded as reflecting four of the identity dimensions described earlier. As expected, the identity dimensions of fiscal intermediary, community problem solver, economic regulator, and social change agent were readily apparent in the organizational purpose statements. The identity dimension of charitable fund manager was not readily apparent, although it seemed to overlap with the fiscal intermediary dimension in the use of the term “invest.” As it relates to the identity dimension of fiscal intermediary, however, the term was associated with a general discussion of “community investment” or “donor investments,” rather than UW management or advisement on the social “investments” of individual donors. Such statements were therefore coded as presence of the fiscal intermediary dimension, but not that of the charitable fund manager dimension.

## Phase III: Pre-processing of textual data

The organizational statements of purpose from the full data set were processed to remove non-alphabetical characters, stop words, punctuation and blank space. Stop words such as “the”, “and”, “or” are often removed when working with textual data since they occur frequently across all documents (in our case statements) in a corpus, and do not help to distinguish one document from another. The remaining terms were reduced to their stem (or root word) to create as much term consistency as possible across observations. The statements were then tokenized, meaning they were parsed into individual terms. The full set of terms (minus the stop words removed earlier) across the entire corpus of statements could then be identified.

A document term matrix was created that contained observations as rows, and terms as columns. Each column contained the number of times a particular term appeared in the statement associated with that observation. Document term matrices are typically very large and sparse, and it is often helpful to reduce their sparsity by removing terms/columns that are mostly empty across observations. This step is justified since terms that only appear once across a corpus of documents are unlikely to be helpful in classifying documents into different sets, which is the goal here. The document term matrix was therefore reduced by removing columns containing predominantly zeros. Finally, the document term matrix was transformed into a binary matrix, where a “1” indicates that a term is present in a particular statement, and a “0” indicates that it is absent from the statement. This final step was taken in order to train a series of naïve Bayes classifiers, which use proportions of words to identify the class to which a given document most likely belongs.

## Phase IV: Supervised machine learning using naïve Bayes

The pre-processed textual data in the form of a binary document term matrix, as well as the subset of statements hand-coded for the presence of absence of each identity dimension were then used to create naïve Bayes classifiers. Naïve Bayes classifiers can be used to label or classify documents (statements in this case) into two or more groups. In this case, four distinct naïve Bayes models were developed to classify whether a particular identity dimension was present or absent from a particular statement. A fifth classifier was not necessary since the identity dimension of charitable fund manager was not apparent across the subset of statements that were hand-coded.

Naïve Bayes classifiers for document classification are models where the binary dependent variable indicates the class of a document (in this case the presence or absence of an identity dimension). Independent variables can be any predictors; in this case they are all of the terms included in the document term matrix. Naïve Bayes classifiers use Bayes rule to learn a joint probability model; the posterior (probability of a particular class given a document) is equal to the likelihood (probability of a document given a particular class), times the prior (probability of a class), divided by the marginal likelihood (probability of the document) (Friedman, Hastie, & Tibshirani, 2001; James, Witten, & Hastie, 2014). Each document is comprised of terms. If we assume that terms are independent conditional on a document class, then we can calculate document probabilities based on term probabilities (Friedman, Hastie, & Tibshirani, 2001; James, Witten, & Hastie, 2014).

In supervised machine learning, such as naïve Bayes classification, pre-coded data are typically divided into “training” and “test” sets. The training set is used to develop a model with weights that can predict the known class of a given document given the terms in the document. The model is then applied to the test set in order to compare the classes predicted by the model with the known classes based on pre-coding. In this case, the pre-coded data sample was divided into a training set of 263 observations and a test set of 87 observations.

The strength of a naïve Bayes classifier can be assessed using a confusion matrix to compare the classes predicted by the models with those known to be accurate based on the hand-coded test set. The strength of the model can then be assessed by considering the number of true and false positives and negatives, and indicators including:

* Accuracy - percentage of documents that are correctly classified
* Sensitivity – percentage of positives that are correctly classified
* Specificity – percentage of negatives that are correctly classified

Several naïve Bayes classifiers were trained on the data using document term matrices with different levels of sparsity (containing up to 198 and as few as 74 terms), since using fewer terms in a model can sometimes improve the predictive accuracy of models. **Table 2** presents the number of terms used as predictors, confusion matrices, and the indicators described above for the four final models used to classify statements for presence/absence of each of the identity dimensions. A classifier is considered strong if it simultaneously has moderate to high accuracy, sensitivity, and specificity. Across all of the final models used in this study, performance indicators are acceptable meaning that the models can be expected to perform reasonably well on data similar to, but distinct from the training and test sets. The models were therefore used to predict the classes of the un-coded observations for all of the identity dimensions.

## Phase V: Analysis of fully coded data set

Once all data were coded using the naïve Bayes classification method described above, they were analyzed using standard descriptive statistical approaches to examine differences in the distribution of observations across different categorical variables (e.g. cross tabulation and chi-squared test). The purpose of this analysis was not to draw conclusions about causality or make population-level inferences, but simply to describe temporal and geographic variation in the use of identity dimensions across local UW organizations.

In order to test hypotheses on temporal and geographic variation, a number of variables were operationalized. Year was operationalized as CFC campaign year rather than calendar year. The mezzo-level organizational field variable of political-philanthropic subculture was operationalized at the state-level using Elazar’s conceptualization of moralistic, individualistic, and traditionalistic subcultures. The local-level organizational field variable of proximity to metropolitan area was operationalized as location within a twenty-five mile radius to of one of the 100 most populous cities in the United States.

# Findings

## Use of identity dimensions in organizational purpose statements

The results of the hand-coding process suggest that four of the five identity dimensions identified through previous qualitative research (Young, 2001; Brilliant & Young, 2004) are reflected in organizational purpose statements across the UW system. As previously mentioned, **Table 1** presents exemplary statements that reflect the identity dimensions of fiscal intermediary, community problem solver, economic regulator, and social change agent. Hypotheses 1-4 predict the use of particular terms signaling the use of each of these identity dimensions. The hypothesized terms were indeed present in the hand-coded organizational purpose statements and were used in a manner consistent with hypotheses 1-4. Additional terms associated with each of the four identity dimensions were also observed, and are noted in **Table 1**.

## Temporal variation

Temporal variation in the use of the fiscal intermediary, community problem solver, economic regulator, and social change agent identity dimensions was assessed using cross tabulation and a chi-squared test for independence of two categorical variables. **Table 3** presents the distribution of observations where each of the four identity dimensions are either present or absent from 2012 to 2016. Independence tests were conducted for each identity dimension over this four-year times period.

The results of these analyses suggest that use of the fiscal intermediary identity dimension is independent of year, while use of the community problem solver, economic regulator, and social change agent identity dimensions are *not* independent of year. A closer examination of the count and percentage data presented in **Table 3**, as well as a visual inspection of **Figure 1** suggest that use of the community problem solver, and economic regulator dimensions across the UW system has decreased from 2012-2016, while use of the social change agent dimension increased during the same period.

To begin to assess what might be driving these changes in the use of the different identity dimensions, local UW observations were grouped by changes made to their organizational purpose statement between 2012 and 2016. The variable *change* was coded “0” if an organization’s 2012 and 2016 purpose statements were equivalent, “1” if its purpose statements in 2012 and 2016 were different, and “2” if the organization participated in the CFC in 2012 but not in 2016. It should be noted that at least some of the local UW organizations that dropped out of the CFC from 2012 to 2016 ceased to exist entirely during this period as they were disbanded or consolidated. These changes illustrate the true threat of changing environmental conditions to the UW system.

**Table 4** presents the distribution of 2012 observations across these three groups for each of the four identity dimensions, as well as the results of each associated independence test. **Figure 2** presents the proportional use of each identity dimension across the three groups in 2012 in the form of a bar chart. The results of this analysis suggest that organizations that either dropped out of the CFC, changed their organizational purpose statement, or did not change their organizational purpose statement between 2012 and 2016 used each identity dimension at about the same rate in 2012.

**Table 5** and **Figure 3** compare the distribution of identity dimension use in 2012 and 2016 for the group that made changes to their organizational purpose statements in this time period. A visual inspection of **Figure 3**, and the data in **Table 5** suggests that the organizations that changed their purpose statements from 2012 and 2016 decreased their use of the traditional dimensions of fiscal intermediary, community problem solver, and economic regulator, while increasing their use of the social change agent dimension. Unfortunately the cell counts in **Table 5** were so small that it was not possible/appropriate to use a chi-squared test to statistically assess the relationship between year and identity dimension use for this group. Tentatively, however, it appears that the distribution of local UW organization use of the different identity dimensions might be changing over time as some organizations using traditional dimensions drop out of the CFC, while a portion of the remaining organizations cease using traditional dimensions and begin to use the new dimension of social change agent.

## Geographic variation

As described earlier, two variables were operationalized to assess geographic variation in the use of local UW identity dimensions across the United States: regional political-philanthropic subculture, and proximity to a large city. **Table 6** presents the distribution of identity dimension use across areas characterized as having either an individualistic, moralistic, and traditionalistic subculture. The associated independence tests suggest that while use of the fiscal intermediary identity dimension is independent of subculture, use of the community problem solver, economic regulator, and social change agent dimensions is *not* independent of subculture.

Local UW organizations operating in states dominated by the moralistic subculture use the identity dimension of social change agent at a higher rate than their counterparts in individualistic and traditionalistic states. Local UW organizations operating in individualistic and traditionalistic states use the identity dimensions of community problem solver and economic regulator in their organizational purpose statements at a higher rate than their peers in moralistic states. These findings suggest that local UW organizations may be facing different pressures at the regional-field level that prompt them to make different decisions regarding which organizational identity claims they should make in order to maximize their legitimacy in the eyes of important stakeholders.

In addition to regional-level geographic variation based on political-philanthropic subculture, this study also examines variation in identity dimension use based on local UW proximity to a large city. **Table 6** presents the distribution of identity dimension use for local UW organizations located either within twenty-five miles, or at a greater distance from one of the one hundred more populous cities in the United States. **Figures 4-7** map of the use of each of the identity dimensions across the United States. In each of the maps, a black dot indicates the location of a local UW that used the identity dimension in its organizational purpose statement, while a yellow dot indicates the location of a large city.

The results of the independence tests presented in **Table 6** suggest that local UW organizations that operate closer to large cities may be using different identity dimensions in their organizational purpose statements than their counterparts that are less proximate to a populous urban area. Local UW organizations that are located more than twenty-five miles from a large city use the traditional identity dimensions of fiscal intermediary, community problem solver, and economic regulator at a higher rate than their peers located closer to large cities. Local UW organizations that operate within twenty-five miles of a populous city use the identity dimension of social change agent in their organizational purpose statements at a higher rate than their peers in more rural areas. The results of this descriptive analysis suggest that local UW organizations may be subject to different local-level field pressures, which in turn cause them to reach different conclusions as to what organizational identity claims they should make in order to garner legitimacy and support from the local community.

# Discussion

This descriptive study addresses a number of research questions: 1) What identity dimensions are in use across the UW system in the United States? 2) Is there geographic or temporal variation in the way individual local UW organizations use these different identity dimensions to make claims about their organizational identity? 3) Does this geographic and temporal variation suggest that local UW organizations are subject to environmental pressures at multiple levels of analysis that lead them to make divergent claims about their organizational identity?

The findings based on a qualitative analysis of the sample of hand-coded organizational purpose statements suggest that the federated fund identity dimensions of fiscal intermediary, community problem solver, economic regulator, and social change agent are indeed reflected in the organizational purpose statements of local UW organizations. These findings provide support for hypotheses 1-5, which predicted the use of certain terms, the presence of the four identity dimensions listed above, and the absence of the identity dimension of charitable fund manager. Hypotheses 1-4 are further supported by analysis of the statements coded using the naïve Bayes classifiers described earlier. Beyond the support that they provide for the hypotheses specified for this study, these findings are in line with research positing that organizational identity is an important source of both stability and change (Dutton & Dukerich, 1991; Gioia, Schultz, & Corley, 2000; Humphreys & Brown, 2002; Pedersen, & Dobbin, 2006; Ravasi & Schultz, 2006; Gioia et al., 2013; Boin et al, 2016).

For example, the fact that the social change agent dimension is reflected in 43% of the local UW purpose statements for the 2016 CFC is evidence that this new identity dimension is being incorporated across the UW system; the organizational identity of individual local UW organizations, as well as the UW system as a whole is evolving in response to changing environmental conditions. This finding provides further support for the notion that organizations can integrate new dimensions into their identity over time; remaining true to their essence while adapting to changing environmental conditions (Young, 2001; Brilliant & Young, 2004; Corley et al., 2006; Gioia et al., 2013). Still, a large proportion of local UW organization purpose statements continue to reflect the traditional identity dimensions of fiscal intermediary, community problem solver, and economic regulator. This continuity in traditional identity dimension use is a good illustration of the enduring quality of organizational identity.

The specific terms associated with the community problem solver and economic regulator dimensions provide evidence that, in addition to incorporating new dimensions into their organizational identity, local UW organizations are giving new meaning to traditional identity dimensions. As noted earlier, the institutional logic of bureaucratic efficacy undergirding traditional understandings of the community problem solver dimension held that professional social workers and managers were best equipped to assess and address community needs. The Community Impact initiative reflects a more contemporary logic of community problem solving that emphasizes collaboration between local UW staff, human services nonprofits, and community members. Hand-coding revealed a number of instances where this new understanding of community problem solver was explicitly emphasized (see **Table 1**). Less anticipated, however, was a similar emphasis on community inclusion and transparency associated with the use of the economic regulator identity dimension.

Traditionally federated funds like the UW monitored member organizations *for* the community; professional staff members were considered best equipped to monitor local charities. On a number of occasions, organizational purpose statements reflecting the economic regulator dimension emphasized the fact that local UW organizations were monitoring member agencies *with* community members (see **Table 1**). These findings suggest that, in addition to incorporating new federated fund identity dimensions into their organizational identity, local UW organizations are also changing the meaning of their community problem solver and economic regulator identity dimensions to better align with a new institutional logic that conceives of nonprofit accountability as transparency rather than bureaucratic efficacy.

The geographic and temporal variation in the use of identity dimensions across the UW system described earlier provides support for the idea that local UW organizations face contextual pressures at a number of different analysis. Recent academic articles on organizational change have called for more research at multiple levels of analysis, and for greater consideration of the effect of local institutions on organizational fields (Marquis, & Battilana, 2009; Marquis, Glynn, & Davis, 2007). This study both responds to this call and highlights the need for more research in this vein. Future research should consider the effect of contextual pressures at multiple levels of analysis on organizational change processes. For example, under what conditions to local environmental pressures supersede contextual pressures at other levels of analysis? Do pressures at different levels of analysis have more or less influence in shaping organizational change processes along different dimensions (e.g. identity-focused change versus program or service offerings)? This study focuses on a field of nonprofit organizations. Do contextual pressures at different levels of analysis have a divergent effect on organizations from different sectors?

In terms of future research focused specifically on the UW system, the research presented here simply describes variation in the use of identity dimensions across the UW system. Future studies focused should build on the research presented here to hypothesize and test for evidence of the effect of specific environmental factors or pressures that lead to variation in implementation of the Community Impact initiative across local UW organizations. Future studies should also consider the relationship between the kind of identity-focused change examined here, and change along other dimensions such as UW reallocation decisions, program offerings, and organizational structure.

Finally, this study highlights the opportunity of using textual data and machine learning to examine identity-focused change. Future research should continue in this vein. Language and discourse play an important role in shaping the implementation of organizational change broadly and identity-focused change specifically. For example, the results of a study by Fiss and Zajac (2006) suggest that the stakeholder perceptions of identity-focused organizational change processes are shaped by the manner in which change is framed by managers. Chreim (2005) finds that an elite group of managers at a Canadian Bank use a variety of discursive strategies to construct a new consensus around the organization’s identity. These strategies include the use of juxtaposition, expansive labels that referenced traditional identity dimensions while constructing new ones, and themes from the broader business discourse. In their study of the New York Port Authority’s evolving response to the issue of homelessness, Dutton and Dukerich (1991, p. 520) conclude that organizational identity itself can serve as a frame or lens that, “filters and molds an organizations’ interpretation and action on an issue”; collective understandings of organizational identity frame which strategies and tactics are perceived as legitimate by organization members. The also find, however, that institutionalized discourses from the broader environment constrain use of organizational identity as a frame for vetting legitimate organizational action.

These examples point to the significance of language in advancing new organizational identity claims, and influencing stakeholder interpretations of broader change processes. The methods employed in this study, which are suitable for working with large datasets containing textual data, can facilitate future empirical research and increase our understanding of the relationship between language, change, and organizational identity.

# Conclusion

This study describes how a significant identity-focused change initiative plays out across an important system of nonprofit organizations. It also provides preliminary evidence for the idea that contextual pressures at different levels constrain organizations shape the identity claims organizations make in order to cultivate legitimacy in the eyes of important stakeholders.

Like any research, this study has a number of limitations. First, the data used for this analysis come from the CFC, which is an outlier when compared to other workplace giving campaigns in terms of geographic scope, as well as level of employee and nonprofit/federated fund participation. This may limit the generalizability of some findings presented here. Also, the descriptive analytical approaches used in this study cannot be used to draw inferences about the full population of local UW organizations, or the factors causing the variation observed across the UW system.

Nevertheless, this study makes several contributions. First, it provides empirical evidence that the federated fund identity dimensions posited by earlier qualitative research are in use by a large sample of local UW organizations. Second, it adds to our understanding of identity-focused organizational change by providing preliminary evidence that the identity claims made by individual organizations are simultaneously shaped by contextual factors at different levels of analysis. Third, given that the focus of this research is the UW system, the most important private funder of local social services in the country, this study provides insight into changes that will affect many local communities for years to come. This study also makes a methodological contribution by applying machine learning techniques to analyze textual data in order to better understand identity-focused organizational change. Future research should continue to examine this interesting and important topic, and to leverage the opportunities that big data and new methodological approaches afford to social scientists.

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# Tables and Figures

## **Table 1**: Exemplary statements coded as containing different identity dimensions

|  |  |  |
| --- | --- | --- |
| Statements | Hypothesized  Terms | Additional  Terms |
| Fiscal Intermediary | | |
| Raises and allocates funds to fourteen Cullman County agencies who provide health and human services. Local volunteer board monitors agencies for accountability and community impact.  To efficiently raise and effectively distribute financial and volunteer resources to support community-determined initiatives which improve the lives of community members. | Allocate  Collect  Donation  Efficient  Fund  Fundraise  Gift | Campaign  Distribute  Donor  Give  Grant  Invest(ment)  Resource  Support |
| Community Problem Solver | | |
| Identifies critical community needs. Reviews, funds, monitors agencies providing programs and services addressing those needs and promoting an independent, educated, healthy and financially stable community.  Ensures your gift goes farther/makes the greatest impact. Community volunteers review/evaluate programs and allocate funding impacting health and human services for all ages. | Collaboration  Need  Problem  Program  Service  Solution | Critical  Essential |
| Economic Regulator | | |
| Raised and allocates funds to qualified programs addressing health and human service needs, engages volunteers and refers people to needed local assistance programs.  A community based fundraising effort to raise funds supporting selected local charitable organizations interviewed annually by the Board of Directors. | Effective  Evaluation  Member or  Partner  (organization) Performance  Quality | Accountable  Govern  Interview  Monitor  Review  Worthy |
| Social Change Agent | | |
| To mobilize and create sustainable and measureable results to improve lives through collaborative leadership to address community needs.  A community impact organization that improves community conditions and lives by serving as a convener for systems change and a program investor with a results-based accountability commitment. | Advocate  Change  Impact  Long-term (solution) | Community builder  Cause  Lasting  Measurable  Mobilize  Results  Sustainable |

## **Table 2**. Assessment of final naïve Bayes classifiers

Fiscal Intermediary: Terms = 198

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Confusion Matrix | |  |  | Indicator | Value |
|  | Predicted + | Predicted - |  | Accuracy | 82.95 % |
| True + | 48 | 9 |  | Sensitivity | 84.21 % |
| True - | 6 | 25 |  | Specificity | 80.65 % |

Community Problem Solver: Terms = 198

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Confusion Matrix | |  |  | Indicator | Value |
|  | Predicted + | Predicted - |  | Accuracy | 77.27 % |
| True + | 47 | 10 |  | Sensitivity | 82.46 % |
| True - | 10 | 21 |  | Specificity | 67.74 % |

Economic Regulator: Terms = 198

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Confusion Matrix | |  |  | Indicator | Value |
|  | Predicted + | Predicted - |  | Accuracy | 81.82 % |
| True + | 23 | 6 |  | Sensitivity | 79.31 % |
| True - | 10 | 49 |  | Specificity | 83.05 % |

Social Change Agent: Terms = 74

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Confusion Matrix | |  |  | Indicator | Value |
|  | Predicted + | Predicted - |  | Accuracy | 82.95 % |
| True + | 28 | 6 |  | Sensitivity | 82.35 % |
| True - | 9 | 45 |  | Specificity | 83.33 % |

## **Table 3**: Identity dimension use by year

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  |  | **2012** | **2013** | **2014** | **2015** | **2016** | **Independence Test** |
| Total observations | | 716 | 662 | 603 | 563 | 536 | **-** |
| Fiscal Intermediary | Present | 515  72% | 464  70% | 431  71% | 392  70% | 356  66% | df = 4,  p-value = 0.267 |
| Absent | 201  28% | 198  30% | 172  29% | 121  30% | 180  34% |
| Comm Prob Solver | Present | 489  68% | 438  66% | 398  66% | 355  63% | 321  60% | df = 4,  p-value = 0.025 |
| Absent | 227  32% | 224  34% | 205  34% | 208  37% | 215  40% |
| Economic Regulator | Present | 352  49% | 315  48% | 282  47% | 242  43% | 213  40% | df = 4,  p-value = 0.007 |
| Absent | 364  51% | 347  52% | 321  53% | 321  57% | 323  60% |
| Socl Change Agent | Present | 256  36% | 252  38% | 227  38% | 231  41% | 232  43% | df = 4,  p-value = 0.061 |
| Absent | 460  64% | 410  62% | 376  62% | 332  59% | 304  57% |

## **Table 4**: Identity dimension use in 2012 by UW 2012-2016 grouping

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  |  | **Unchanged**  **Statement** | **Changed**  **Statement** | **Dropped Out** | **Independence Test** |
| Total | | 664 | 21 | 30 | - |
| Fiscal Intermediary | Present | 477  72% | 19  90% | 20  67% | df = 2,  p-value = 0.136 |
| Absent | 187  28% | 2  10% | 10  33% |
| Comm Prob Solver | Present | 451  68% | 18  86% | 20  67% | df = 2,  p-value = 0.221 |
| Absent | 213  32% | 3  14% | 10  33% |
| Economic Regulator | Present | 325  49% | 15  71% | 12  40% | df = 2,  p-value = 0.075 |
| Absent | 339  51% | 6  29% | 18  60% |
| Socl Change Agent | Present | 236  36% | 7  33% | 13  43% | df = 2,  p-value = 0.665 |
| Absent | 428  64% | 14  67% | 17  57% |

## **Table 5**: Identity dimension use by UW “changed statement” group in 2012 and 2016

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  |  | **2012** | **2016** | **Independence Test** |
| Fiscal Intermediary | Present | 19  90% | 8  67% | Insufficient data |
| Absent | 2  10% | 4  33% |
| Comm Prob Solver | Present | 18  86% | 6  50% | Insufficient data |
| Absent | 3  14% | 6  50% |
| Economic Regulator | Present | 15  71% | 5  42% | Insufficient data |
| Absent | 6  29% | 7  58% |
| Socl Change Agent | Present | 7  33% | 5  42% | Insufficient data |
| Absent | 14  67% | 7  58% |

## **Table 6**: Identity dimension use in 2012 by philanthropic subculture

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  |  | **Individual** | **Moral** | **Traditional** | **Independence Test** |
| Total | | 1083 | 861 | 1131 | - |
| Fiscal Intermediary | Present | 183  73% | 135  68% | 198  76% | df = 2,  p-value = 0.156 |
| Absent | 69  27% | 65  32% | 64  24% |
| Comm Prob Solver | Present | 178  71% | 120  60% | 191  73% | df = 2,  p-value = 0.008 |
| Absent | 74  29% | 80  40% | 71  27% |
| Economic Regulator | Present | 131  52% | 80  40% | 141  54% | df = 2,  p-value = 0.008 |
| Absent | 121  48% | 120  60% | 121  46% |
| Socl Change Agent | Present | 87  35% | 89  45% | 79  30% | df = 2,  p-value = 0.005 |
| Absent | 165  65% | 111  55% | 183  70% |

## **Table 7**: Identity dimension use in 2012 by proximity to large city

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  |  | **> 25 miles from Large City** | **< 25 miles from Large City** | **Independence Test** |
| Total | | 2279 | 760 | - |
| Fiscal Intermediary | Present | 399  75% | 110  64% | df = 1,  p-value = 0.006 |
| Absent | 134  25% | 63  36% |
| Comm Prob Solver | Present | 382  72% | 102  59% | df = 1,  p-value = 0.002 |
| Absent | 151  28% | 71  41% |
| Economic Regulator | Present | 272  51% | 74  43% | df = 1, p-value =  0.07183 |
| Absent | 261  49% | 99  57% |
| Socl Change Agent | Present | 174  33% | 77  45% | df = 1,  p-value = 0.006 |
| Absent | 359  67% | 96  55% |

## **Figure 1:** Percentage of UW’s using identity dimensions 2012 – 2016



## **Figures 2 – 3**: Proportional identity dimension use by UW 2012-2016 grouping

|  |
| --- |
|  |
|  |



## **Figures 4 - 5**: Use of identity dimensions in 2012 across USA



## **Figures 6 - 7**: Use of identity dimensions in 2012 across USA

