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Functionaries: A Distributional Approach to Institutional Analysis

Dustin S. Stoltz[1] | Marshall A. Taylor[2] | Omar Lizardo[3]

[1]Department of Sociology and Anthropology, Lehigh University, Bethlehem, Pennsylvania, USA | [2]Department of Sociology, New Mexico State University, Las Cruces, New Mexico, USA | [3]Department of Sociology, University of California Los Angeles, Los Angeles, California, USA

Correspondence: Dustin S. Stoltz (dss219@lehigh.edu)

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ABSTRACT

This paper outlines a distributional approach to institutional analysis, reconceptualising institutions as distributions of knowledge and activity across people. We argue that institutionalisation and institutional change are best understood by focussing on actors with the requisite knowledge and motivation to keep institutional patterns going, fix them when they go awry, or transform them when required, here called functionaries. The distributional approach allows us to distinguish between two main types of institutional change often conflated in the literature: Content-based and formal change. Content-based change, the one most often discussed, involves the importation, recombination, or expansion of specific patterns of activity. In contrast, formal change, often neglected in the literature, refers to shifts in the distribution of knowledge and activity, leading to dynamics of centralisation and decentralisation of institutional patterns. In this way, the distributional approach highlights the role of functionaries in both institutional stability and change, providing a micro-level perspective on institutional dynamics.

1 | Introduction

Institutional theories stress a complementarity between the objective and the subjective (Martin 2001). Objectively, institutions are repeated behavioural patterns, downstream consequences, and related self-correcting mechanisms (Jepperson 1991). Subjectively, institutions are schemas, skills, and habits (broadly, knowledge) enabling such systematically patterned conduct (Powell and DiMaggio 1991). The typical strategy for integrating the two poles is the 'dialectic of institutionalisation' (Barley and Tolbert 1997; Berger and Luckmann 1966). The story goes like this. First, institutions emerge via people's creative activity. However, eventually, the patterns become habitualized, externalised, typified, and transmitted as taken-for-granted realities to the next generation. Finally, the patterns become sedimented, with everyone assuming this is how things are done (Tolbert and Zucker 1996). Despite its undeniable theoretical appeal, this model leaves us with a widely acknowledged conundrum for institutional theory (Battilana and Casciaro 2012). Once institutionalised, actors will *reproduce* patterns: they see the pattern externalised by other actors, internalise it, and then externalise it themselves, providing more evidence of the pattern to different actors. Nevertheless, aside from error and exogenous shocks, the theory cannot convincingly account for how these patterns change (Clemens and Cook 1999), nor does it provide a credible account of how the patterns are maintained in the face of inevitable decay (Lawrence and Suddaby 2006).

To address this and other foundational issues, we expand on recent rethinkings of the conceptual underpinnings of institutional and organisational theory (Bitektine et al. 2020; Cardinale 2018; Hallett and Hawbaker 2021). We develop a productive way forward by elaborating the classic imagery of a 'dialectic of institutionalisation'. Specifically, we examine the

The number of recognised nation-states varies depending on the source.

implications of the relatively neglected image of institutions as *distributions* of knowledge and expertise across people (Carley 1991, 332; Reay 2010). We argue that institutionalising any set of patterns involves a reorganisation or radical change in the distribution of activities and knowledge. We contrast this 'formal' approach to the analysis of institutions and institutionalisation with the substantive imagery dominant in the literature, where change happens via creative recombination and bricolage of institutional elements by agentic actors who bridge or push institutional boundaries or are located at the interstices of institutional spheres (e.g., Rao et al. 2005; Morrill 2017; Voronov and Yorks 2015; Goldenstein and Walgenbach 2019; Lazega 2024).

The sociological take on institutions departs from observing more or less regular patterns of activity persisting across generations. In Hughes's classic statement, what all usages of the term 'institution' in sociology have in common is the idea of 'some sort of establishment or relative *permanence* of a distinctly social sort' (Hughes 1936, 180, italics added). The notion of 'permanence', is less prominent than other core sociological ideas, such as anomie, bureaucracy, alienation and modernity. Nevertheless, all the classical theorists dealt with it in some form (Lizardo 2022). The creation, maintenance, destruction, and regeneration of some sort of permanence in social life are the core problems that institutional theory is meant to solve. For people, social life *feels* as if it were built on regularities routinely identified and engaged with (Martin 2001). These are durable enough that people come to expect them, more or less, across distances, people, and time (Tolbert and Zucker 1996). These observations inspire a 'minimalist' definition of institutions: A persistent, more or less permanent, pattern of practices, cognitions, and feelings endowed with self-correcting tendencies in cases of deviation (Durkheim 1982, 47; Jepperson 1991, 145; Martin 2001, 194).

A concern with permanence and 'self-correction', however, has the danger of leading analysts to emphasise the top-down aspects of institutions that seem to constrain people's actions and cognitions and which, in some settings, seem to mysteriously go on independently of people. This objectifying view corresponds to the folk phenomenological stance towards those institutional patterns that have acquired obdurate durability and permanence. In this case, people often (but not always) perceive such regularised patterns as 'out there', independent of their activity (Martin 2001, 194). People presume the pattern will continue, even when some stop actively instantiating it. The institutional pattern feels like it 'hangs above' social life, constraining people's actions (Durkheim, 1895/1982). Following this hunch, some analysts emphasise the 'macro' aspects of institutions, particularly those that helped explain the origins of homogeneity, equilibrium, and 'isomorphism' across fields of striving (DiMaggio and Powell 1983). Institutions came to be conceived mainly as sedimented reifications (Tolbert and Zucker 1996), grounded in well-established habits and pre-reflexive heuristics, losing their connection to agency, reflexivity, process, and human activity more generally.

The last 2 decades have seen a resurgence of theoretical and empirical work in institutional theory aimed at correcting these tendencies in the macro approach (Hallett and Hawbaker 2021, 5ff). Particularly, action-oriented imageries of actors *within* institutions emphasising embedded agency, institutional entrepreneurship, and institutional work have taken hold (Battilana 2006; Battilana et al. 2009; Lawrence et al. 2011; Lazega 2017; Seo and Creed 2002). Here, institutions are not only sources of constraint but also enable specific modes of activity, interaction, cognition, and affect (Zilber 2009). Institutional entrepreneurs identify contradictions and opportunities in existing institutional orders, sometimes pushing institutional patterns in transformative directions. This emphasis on institutional work puts the focus squarely on the routine activities of people within institutions, refusing to consider macro-patterns as either 'unpeopled' or *self*-reproducing: The persistence of institutional patterns and their possible transformation *takes work*.

In this way, a concern with the micro-foundations of institutions has eclipsed previous emphases on top-down regular or cognitive-constitutive aspects of institutional patterns (Harmon et al. 2019; Powell and Rerup 2017). In this sense, actors and actorhood have made a comeback, with recent strands in institutional theorising emphasizing how actors operate *within* and *across* institutional boundaries (Bitektine et al. 2020; Voronov and Weber 2020). Finally, inhabited institutionalism puts the spotlight on the lived experience and subjective lifeworld of people within institutions, pointing to processes by which people embody institutional patterns and reproduce and transform them via episodes of everyday interaction (Hallett and Hawbaker 2021).

The distributional approach we propose fits within this recent stream of theorising in institutional theory (e.g., Zilber 2009), borrowing core imagery and theoretical inspiration while aiming to develop critical thematic and conceptual elements that remain under-theorised. Notably, the distributional approach theorises institutional *processes* as established patterns, focussing on the routine work of upkeep and maintenance and, every so often, on the transformation of those patterns, localising the origins and motivations of institutional entrepreneurs and providing strong microfoundations for processes of institutional emergence, maintenance, and change. Here, we are less interested in adjudicating between different lines (or variants) of institutional theory (e.g., Hallett and Hawbaker 2021). Instead, our distributional approach is broadly ecumenical, drawing liberally from classic sociological institutionalism (including neo-and contemporary inhabited institutionalism approaches), agency-centric work on institutions from management and organisational studies (inclusive of embedded agency and institutional work perspectives), and relatively under-exploited lines of thinking in the classical tradition of social-phenomenology, ethnomethodology, and Weberian sociological theory. Our primary aim is to contribute to recent work emphasising a naturalistic approach to the social ontology of institutions, grounded in empirical research across various arenas of institutional life.

2 | Institutions as Distributions

Our point of departure, drawing on social phenomenology (see, e.g., Reay 2010; Schutz and Luckmann 1973), conceptualises

institutions primarily as *distributions*—of knowledge, activities or specific 'structures of feeling'—across a population, which may or may not correspond to explicitly recognised boundaries, such as those separating nations, institutional 'sectors', or societal 'spheres'. Although not typically theorised explicitly, many central phenomena of interest to institutional theorists emerge as byproducts of the uneven distribution of knowledge within institutions and the contingent 'accumulation' of pockets of institutional activity and expertise in specific domains. Distribution implies that some institutional activities are thus 'insulated' away from other people's attention or inspection at particular sites where a lot of the institutional work happens (Meyer and Rowan 1977; Reay 2010). In the distributional approach, knowledge and activities are rarely homogeneously bounded within distinct institutional spheres or sectors (Thornton et al. 2012), with spillover and mixing being the norm and neat boundaries separating pure logics from one another the exception (if ever the empirical case).

2.1 | Two Forms of Institutional Expertise

For the distributional approach to do the relevant conceptual work, we must distinguish between two kinds of institutional expertise: *contributory* and *interactional*. We borrow this distinction from the work of Harry Collins and collaborators in Science and Technology Studies (e.g., Collins and Evans 2008). Although often conflated in institutional analysis, distinguishing these two forms of expertise is crucial for identifying core institutional actors and patterns of institutional change. In what follows, we outline the primary conceptual differences between these forms of institutional knowledge.

2.1.1 | Interactional Expertise

Most people have various levels of *interactional* expertise relative to most well-established institutional patterns (M. Weber 1981, 177–8). This knowledge-by-acquaintance is typically *declarative* (Lizardo 2017) so that a person could pass as a 'member' by overtly displaying (in talk or other public performance) such knowledge to an interested stranger (e.g., about how financial banks—superficially—work). Interactional expertise suffers from the 'knowledge illusion', in that most people radically overestimate the knowledge they have about everyday institutional functioning, mainly because they have meta-knowledge that even though they may not possess the relevant knowledge, such know-how and more intricate understanding of the underlying institutional workings is indeed possessed by relevant specialised others out there, in a (distributed) 'community of knowledge' (Rabb et al. 2019).

2.1.2 | Contributory Expertise

Far fewer people will have *contributory* expertise to keep institutions going (M. Weber 1981). In contrast to interactional expertise, contributory expertise relies on nondeclarative 'knowledge-how' to maintain and reproduce institutional patterns (Lizardo 2017). This knowledge is *tacit* because it is hard to put into context-free, easily communicable formats (Gascoigne and Thornton 2014). This last feature also makes it hard to transfer contributory knowledge across pockets of institutional order and activity. In this way, the 'vertical insulation'—in Reay's (2010) terms—of knowledge across individuals, with the requisite expertise encoded in implicit schemes of practical action, perception, and cognition (Bourdieu 1990), contributes to the typical state of 'horizontal' insulation of knowledge and activities across settings, ecologies, and fields constitutive of most institutional orders.

2.2 | Functionaries

Notably, the division between interactional and contributory experts in the population implies that all (centralised) 'institutions' rely on a small cadre of contributory experts, which we refer to as *functionaries*. In using this term, we take inspiration from Alfred (Weber's (2007)) much-neglected popular essay '*Der Beamte*' (typically translated into English as the 'civil servant', 'official' or 'functionary'). Although we borrow Alfred Weber's term, we do not subscribe to the substantive theory described there, in which an impersonal bureaucratic, machine-like apparatus absorbed dedicated officials and threatened to reduce all social life and all social action to that of colourless, robotic automata. In fact, we see this vision of (one facet of) institutionalisation in the form of a mechanical self-reproducing apparatus as the one we wish to dispel, an image that is produced and reproduced by the very *invisibility* of the maintenance and repair labour of functionaries.

In this last respect, although in the contemporary world, functionaries are *usually* found ensconced within hierarchical, bureaucratic organisations, there is no one-to-one mapping between functionaries as a type of institutional actor and any particular organisational form or structure. Functionaries can exist within many organisational forms (collegial, hierarchical, and network-like) and, within an organisation, can occupy various roles, functions, and levels. Functionaries may even exist outside, betwixt and between organisations, occupying various interstitial positions in 'linked' inter-organisational ecologies or may even exist as 'avatars' of one institutional order ensconced within another (Abbott 2005).

Similarly, although many functionaries use their contributory expertise, as we will see later, to exercise a particular form of authority or domination, functionaries are not *necessarily* in the business of exercising power, authority, or domination over others, except when that exercise of power and authority is crucial to the type of institutional pattern they are in the job of maintaining or repairing. In the end, whether functionaries are concentrated within particular forms of organisation, tend to occupy specific positions or roles within organisations, or exercise particular forms of power, authority, or domination are empirical (and sometimes historical) questions, not ones to be decided from the armchair via definitional fiat.

What, then, are functionaries? (Rintamäki et al. (2024), 2–3) define functionaries as 'elite actors responsible for the operation of the institution', noting that 'functionaries are not only

capable of socialising, maintaining traditions and enforcing rules; they are also capable of making changes within an institution to defend the institution from unwanted disruption and deviant activities and practices'. We endorse most aspects of this definition. However, whether functionaries are 'elites' is itself an empirical question (in most cases, they are not elites and in fact, may even 'low status' according to society-wide metrics of prestige). It is, instead, the central role functionaries play in institutional maintenance, repair, and transformation that qualifies them as functionaries. Every academic in an American University who knows who *really* runs the department (typically a middle-aged woman with no advanced degrees) will have an idea of what we are talking about here.

Functionaries can be considered a special class of individuals who have extensive contributory expertise in the production and repair of institutional patterns within a given institutional domain of activity. This practical knowledge results from actively partaking in the (re)production process. Thus, functionaries (1) actively maintain a pattern and, as a result, develop (2) specialised contributory knowledge, allowing them to maintain the pattern and repair it when it is subject to natural processes of entropy and dissipation (Zucker 1988) or is actively disrupted by maintainers of other patterns, such as professional armies. They use this knowledge to adapt administrative practices to maintain the institution's phenomenological relevance for the broader, nonspecialist public. Otherwise, functionaries can radically repurpose these practices to create a new set of patterns. Compared to the rest of the population that does not satisfy these criteria, this class of actors is significantly smaller.

At the risk of oversimplification, the two criteria mentioned earlier highlight the role of functionaries in institutional stability and institutional change. We argue that, in maintaining these patterns, functionaries ensure they are confronted and 'felt' by the majority of the noncontributory population; thus, functionaries are the link between the work of core actors in institutions and the typical externalising phenomenology of the (nonfunctionary) folk. As a result, most of the population so affected comes to experience these as objective, durable, stable, and even feels like they 'live' in them; this generates the sense (among noncontributor interactional experts) that the pattern would persist even if no particular people were tending the ship. These are the traditional 'container' institutional 'sectors' of classical institutional theory, with the 'power container' of the state being probably the most (experientially) typical one for most humans in recorded history (Giddens 1987). Nevertheless, the (Western Catholic) 'church', especially during counter-reformation efforts, was not far behind (Gorski 2000). It is no wonder that states (or, more experientially likely, their police and armies) are also the source domain for so many abstract 'social structures' that somehow stand opposed to 'agency' (Martin 2009).

The distributional approach invites us to consider institutionalisation processes as dynamic and grounded in human cognition, feeling, activity, and materiality (Haack et al. 2019). Rather than thinking of institutionalisation as establishing a static order (of activity, thinking, or feeling), the distributional approach proposes social, cultural, and material *entropy* as the norm (McDonnell 2016). Most institutional 'work', therefore, is (literally) closer to 'housekeeping': Namely, the upkeep of institutional order from being overtaken by the inevitable 'dirt', entropy, and disorder seeping in from the outside (Douglas 1966). Even in so-called 'high reliability' organisations (Vaughan 2021), accidents, disruptions, and unanticipated consequences are 'normal' (Perrow 1999). All of this must be 'continually countered by active intervention' (Zucker 1988, 26), as even the observation of cultural stability is made possible by fleeting, incremental moments of creativity on the part of particular actors trying to maintain the semblance of a pattern (Taylor et al. 2019). Indeed, the existence of committed 'pattern reparation experts' may be a signal of the most potent form of institutionalisation possible (Weber 1981).

However, our best-established theories typically ignore this 'mimeographic' housekeeping labour, consigning it to the realm of reproductive or repetitive work in favour of creative, agentic or 'entrepreneurial' work keyed to institutional change, innovation and disruption. As Domínguez Rubio (2020, 37) notes,

> Most modern theories and narratives of social and political change are told from the perspective of those who are in charge of imagining and producing the new...because they have been considered the only ones capable of productive political, economic or social value. Meanwhile, the ordinary labour of the 'others of creation'—e.g., housekeepers, cleaners, plumbers, care workers, mechanics or [art] conservators—has been deemed irrelevant because it plays a 'merely' reproductive role and therefore lacks any creative (and with it political, economic or social) value.

We argue that the dichotomy separating actors in charge of difference (innovation, creativity, or disruption) and repetition (repair, conservation, housekeeping) is misleading, as both functions are likely to be taken up by functionaries and the latter is arguably more vital for the everyday life of institutions and organisations. For instance, committed institutional repair experts are likely, in their attempt to 'fix' the malfunction, to produce 'more' (but also perhaps a bit different) instances of the same pattern (Hilbert 1987). We propose that, in the modal case, (contributory) knowledge and activity necessary to (re)produce patterns of regularised conduct are unevenly distributed and concentrated in a set of people who engage in the relevant reproductive activity. Note in this respect that although the 'repair labour' (as a form of 'institutional work') of institutional functionaries can be very much conspicuous and overt—especially when there are explicit threats to their authority and discretion (Micelotta and Washington 2013)—our emphasis here is on the large part of the repair labour iceberg that remains safely out of the view of most people.

2.3 | Two Kinds of Institutional Distribution

The distributional hypothesis implies that no single person can actively maintain all regular patterns of conduct, nor can they be a contributory expert in every possible pattern. Similarly, it is

unlikely that every person will know how to produce all patterns and actively maintain them (Collins and Evans 2008). Thus, the activities and knowledge-producing patterns are *unevenly* and *lumpily* distributed (Berger and Luckmann 1966, 157–158; Carley 1991, 332); people can participate in an institution without having 'full knowledge' of all the regulatory, technical, and normative details that make it work. As Max Weber once noted,

> No ordinary consumer today has even proximate knowledge about the production techniques of the goods he uses daily; most do not even know of which materials and by what industry these goods are produced. The consumer is interested only in those expectations of practical importance for him regarding the performance of these artifacts. The same applies to social institutions such as the monetary system. The money user does not know how money actually acquires its remarkable singular qualities, for even the specialists argue strenuously about that (1981, 177–178).

Institutional patterns can be exhaustively accounted for by looking at the distribution of three elements: activity (Haslanger 2018), knowledge (Reay 2010), and structures of feeling (Williams 2015). Patterns are maintained when those with the requisite contributory knowledge are committed to furthering the activity necessary to carry out the pattern, reinforcing the relevant patterns of thinking and doing and buttressing particular ways of seeing and feeling. We can focus on one critical formal characteristic of this distribution: its spread or concentration, yielding two ideal-typical patterns of institutionalisation: *Decentralised* and *centralised* (see Figure 1).

2.3.1 | Decentralised Institutionalisation

We begin with the (limiting) case of decentralised institutionalisation, namely, when a set of patterns is maintained *evenly by most of the people* to whom the pattern can be ascribed. The theoretically interesting cases of decentralised institutionalisation, which require deep expertise and commitment, are exceptional. Another set of commonplace instances, in which the pattern requires trivial amounts of energy and knowledge, is of lesser theoretical interest. Accordingly, we focus our discussion on the former kind.

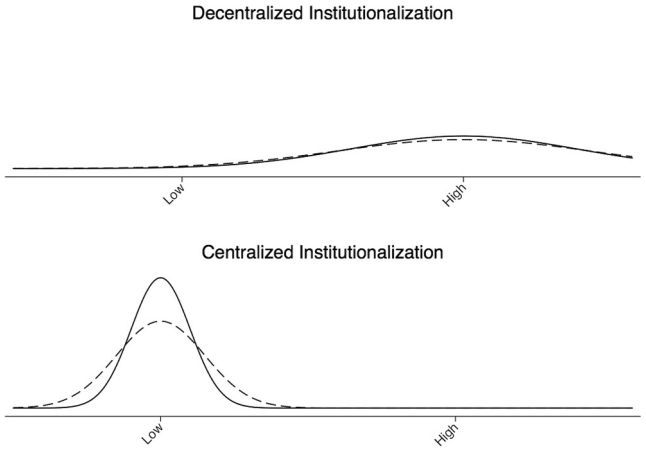

FIGURE 1 | Ideal-Typical Distributions of Institutionalisation. The dashed line is the distribution of knowledge (i.e., contributory expertise). The solid line is the distribution of activity.

For various reasons, pure cases of decentralised institutionalisation are atypical. First, individuals have limited time and energy (McPherson 2004). If most people contribute an equivalent amount of their day to reproducing a set of patterns, these patterns are decentralised. The telling question is, if a person is selected at random, what is the probability they devote a significant portion of their day to cultivating whatever activities, feelings, and cognitions constitute a pattern? If the probability is high, this is a case of decentralised institutionalisation. Second, individuals face knowing and learning limitations at a contributory level; we can only be experts at a few things. Here, the most economical form of knowledge is 'knowing that' a pattern exists, being able to refer to it in a summary fashion, and perhaps maintaining minimal 'interactional' expertise. 'Knowing how' to produce a pattern (i.e., contributory expertise) is much more time and effort-intensive. One way to simplify this limiting factor is to conceive of knowledge as the extent to which an individual has the skills necessary to reproduce a set of patterns when required. If a person is selected at random, what is the probability that they know nearly everything there is to know about producing a pattern? Again, if this probability is high, this is decentralised institutionalisation.

These two constraints suggest four propositions. First, the persistence of decentralised patterns is confined to a relatively small group, and nearly everyone in the group engages in the same activities and has similar knowledge. Therefore, if someone stops reproducing a pattern, any other member could replace them (i.e., minor specialisation and high redundancy), parallelling Durkheim's (1933) argument for what constituted the strength (and weakness) of 'mechanical' solidarity; mechanical solidarity is strong (in the interpersonal sense) but brittle in the macro-societal sense as groups can splinter off and sustain an alternative set of patterns on their own independently of the larger group they split off from (Breiger and Roberts 1998). For instance, the pattern known as the 'Cambridge University Boat Club Race' approaches the ideal-typical decentralised institution pattern; accordingly, most maintenance of this pattern does not require specifically designated functionaries or custodians; instead, predictable and routine instances of breakdown are repaired by members of the community acting in concert using various normalising, negotiating and social control strategies (Lok and De Rond 2013).

Second, when a set of patterns extends beyond a few people, consistency will be significantly reduced, and the relative 'cost' of enacting the pattern (in terms of time and energy commitment) will increase. This type of institutionalisation would exhibit much heterogeneity over space and time, but we may also see 'the reinvention of many wheels' (Simon 2013, 235). As noted earlier, the exception is when the pattern is easy to learn and enact. For example, nearly everybody in the West contributes to maintaining the 'handshake' pattern for greeting people (a pattern radically disrupted by the COVID-19 pandemic). The

same goes for any low-cost coordination games and conventions in the philosophical tradition, like driving on the right side of the road (Lewis 1969). These practices are institutionalised in a decentralised way. They are exceptional because the number of contributory 'experts' can be staggeringly large. In this respect, practices subject to decentralised institutionalisation at scale, such as speaking one of the modern national languages (Anderson 1991), are likely to be seen as 'shallow' rather than 'deep' (Sewell 1992).

Third, those who devote most of their life and day to expertise-greedy decentralised patterns and where the group maintaining the pattern is both small and highly identified with it, will also feel a strong sense of insider-outsider boundaries (Douglas 1966). For decentralised institutionalisation, the primary boundary is between 'believers' and 'nonbelievers'. The primary boundary mechanism of interest is proselytisation (or how nonbelievers are incorporated into the pattern) and excommunication (or how waning believers—or 'free riders'—are removed from the group). The 'outsiders' or 'nonbelievers', however, are minimally impacted by the activity of 'insiders', if at all.

Finally, the *objective* fact of the matter regarding whether a pattern is institutionalised in a decentralised manner may not correspond to people's *intuitions* in this respect. That is, the folk may think something is decentralised when, in fact, it is centrally institutionalised. The most conspicuous example, as argued by Putnam (1975), is the semantics of language with regard to natural kinds (and perhaps every kind of term). Most people believe that the semantic content of most terms is maintained in a largely undifferentiated pool of knowledge maintained by *every* individual in the linguistic community. However, as Putnam argued, even for seemingly consensual natural kind terms (like 'gold'), the ultimate meaning that fixes references may, in the end, be maintained by a select pool of 'experts' (functionaries in our terms) to which the folk ultimately defer. There is thus a 'division of linguistic labour' for fixing the references of terms subject to technical definitions as to their underlying essences (e.g., 'generalised personality disorder') to which the folk do not have direct access; so even in the case of language—as intimated by Weber—institutionalisation follows a centralised pattern.

Money is another social kind that is subject to both types of formal institutionalisation dynamics. Consider local currencies (a.k.a. complementary currencies or LETS) (Grover 2006; Lietaer and Dunne 2013; Werner 2008). These are often explicitly institutionalised in a decentralised manner, requiring almost full participation by the user population in maintenance and repair. Within the relevant population of a local currency system, a large proportion of the people engage in activities necessary to reproduce local currencies. Accordingly, decentralised institutional maintenance systems should exhibit much greater volatility, which is precisely what we observe. For instance, how local communities structure their currency varies across locales. For example, the Complementary Currency Resource Center (2016) tracks 23 different kinds of currency systems. Also, maintaining currency systems over time is often very uncertain. As Chris Sunderland, co-founder of the Bristol Pound, notes, 'It is relatively easy to launch a local currency. It's much more difficult to sustain it' (Kermeliotis 2014). Although in an already established local currency, more are required to maintain the currency if the system is to be successful (i.e., persistent): a greater proportion of the relevant population must continually engage in maintenance and proselytisation. A challenge that even the longest-running local currency in the United States of America, the *Ithaca Hour*, eventually failed to overcome (Khromov 2011; Maurer 2005). Therefore, this form of institutionalisation runs into commitment and collective action problems.

2.3.2 | Centralised Institutionalisation

Centralised institutionalisation occurs when a set of patterns is maintained by only a few functionaries with a much larger number affected by the patterns but with only interactional expertise in them (Weber 1981). Thus, we can recast our question: if a person is drawn at random, what is the joint probability they do not devote most of their day to sustaining a pattern, but at the same time know about the existence of the pattern? If the probability is high, this is a case of centralised institutionalisation. The distribution of contributory expertise is likely even more unequally distributed than activity, familiarity, or feeling, typically because knowing how to produce a set of patterns is embodied in a few functionaries, but also because no single person knows how to produce the entire set of patterns.

Even *within* the subset of functionaries who actively contribute to enacting the pattern, knowledge of how to reproduce the patterns is itself cognitively 'distributed' in Hutchins's (1995) sense, such that 'running' an institution is closer to steering a large naval vessel than driving a car. Not one contributory expert is sufficient to sustain an institutional pattern. Functionaries may specialise in one fragment of the total pattern or another. Nevertheless, together, these specialists can produce the complete set of patterns. This stands in contrast to decentralised institutionalisation, in which nearly everyone in the relevant population has more or less comparable knowledge about a set of patterns (e.g., 'call mom on mother's day'). We argue that this centralised institutionalisation is likely to be the modal type, especially related to the most durable and historically significant sets of patterns, such as markets, politics, art, and science.

We propose three propositions regarding centralised institutionalisation. First, unlike decentralised institutionalisation, the number of people affected by centralised patterns can be enormous, even without losing consistency over time and space (Giddens 1984), making the pattern more likely to persist. Second, although the boundary that divides insiders and outsiders remains important, centralised institutionalisation includes a significant boundary between the 'laity' and the functionaries—or, those who devote most of their time and knowledge to a pattern and those who only devote a minimal amount (Weber 1978, 251). It is here that most people can 'take it for granted' that patterns will persist, yet they do not know how to sustain them (Tolbert and Zucker 1996). As C. Wright Mills once put it, '[E]veryone knows somebody has got to run the show... [o]thers do not care and besides, they do not know how' (Mills 1956, 294). For most, the insider-outsider boundary is less salient, and people are likely to feel that the pattern has a life of its own. Thus, while incorporating new people into the laity (through proselytisation)

remains an important mechanism of institutional expansion, removing deviant actors from the laity (through excommunication) is less significant for centralised institutionalisation. Instead, recruiting, training and retaining functionaries—and cultivating a functionary's 'ethos'—are the most effective organisational mechanisms of interest in centralised institutionalisation (Schneider 1987; March and Simon 1993).

Consider national currency systems. The US Dollar (USD), for instance, is likely used by nearly all occupants of the United States. Although most U.S. residents use this currency, few actively engage in the processes that produce it or even know how to produce the national currency if given the opportunity. Most know little about how national currencies are created, how our phones can interact with bank computers to transfer money into our accounts, how ATMs are stocked with cash, are able to reconcile with distant banking centres, or what is needed for our checks to transfer money between two legally and geographically unconnected banks. Furthermore, our continued use of national currency does not confer this knowledge, and even among fiscal and monetary experts, it is unevenly distributed. Taking the printing of monetary notes as one aspect of the production of national currencies, a single company—De La Rue—plays a role in printing paper currency for the majority (about 140) of the nearly 200 nation-states on the globe and of the 18–25 billion banknotes printed by private companies, De La Rue prints over a third of it (De La Rue plc 2020; Tovey 2015).

3 | Functionaries in Centralised Institutions

The contributory activity of experts sustains institutional patterns, with the limiting case being everyone's expertise in a low-cost, maximally decentralised pattern (Collins and Evans 2008). As noted earlier, in decentralised pattern maintenance and repair, contributory expertise and pattern-maintenance activity are (roughly) evenly distributed. With centralised maintenance and repair, the majority engage the downstream outcomes or products (as either 'goods' or 'bads') of the institution but are not involved in their creation and upkeep. Therefore, only interactional expertise is required from most, leaving the contributory role to a smaller set of functionaries. By isolating the modal process of institutional upkeep and repair to a relatively small number of contributory experts, we can also derive tractable, observable microfoundations for well-researched meso-level mechanisms of institutional maintenance (Lawrence and Suddaby 2006). This section details some of these micro-level, centralised institutionalisation mechanisms, focussing on the few expert functionaries who keep institutions going. This last task is crucial in institutional analysis, given the critical role centralised institutionalisation plays in differentiated societies and the significance of 'professionally mediated' institutionalisation in the literature (Powell and DiMaggio 1991).

3.1 | Maintenance and Repair

Centralised institutionalisation occurs when particular groups with extensive contributory expertise, embodied primarily in tacit knowledge, are responsible for maintaining a pattern. The practical knowledge of functionaries results from their recurring role in the (re)production process. Pattern maintenance requires a source of *motivation* for functionaries to 'carry out' the pattern repeatedly and reliably (Abrutyn and Lizardo 2022). Substantively, contributory institutional experts may be motivated to do so under two conditions. First, there is a felt *moral* obligation to the pattern, or otherwise an expected payoff for recreating the pattern. Second, contributory experts may sustain the pattern because they believe other experts are committed to their maintenance; that is, they have a 'third-order belief' that the pattern is seen as desirable (Correll et al. 2017). In centralised institutionalisation, pattern maintenance does not require the majority to be intrinsically or extrinsically motivated to maintain and repair the pattern. The motivation for pattern upkeep is an essential source of variation (and distinction) among functionaries. As a result of their motivated commitment to the pattern, functionaries develop specialised contributory expertise, enabling them to maintain and repair it. In this sense, the meso-level practices of embedding and routinising (e.g., Currie et al. 2012)—i.e., the extension of the moral obligations and motivations for maintaining institutional patterns into day-to-day life (Lawrence and Suddaby, 2006, 230)—may constitute unique burdens for functionaries.

Repair is required when the pattern becomes vulnerable to undirected processes of entropy and dissipation (McDonnell 2016; Zucker 1988). Alternatively, the pattern could be actively disrupted by other functionaries (e.g., newcomers) interested in maintaining different patterns or seeking to replace dominant ones, the core agonistic dynamic animating the various sociological traditions of field theory (Kluttz and Fligstein 2016). In either case, functionaries use their expertise to either adapt administrative practices to preserve the phenomenological relevance of the pattern for the more extensive set of nonspecialists (i.e., laity) or otherwise radically repurpose these practices to create a new set of patterns—forms of creative adaptation and repurposing that are elsewhere called 'enabling work' (Riehl et al. 2018; Lawrence and Suddaby 2006). Compared with people who do not meet these criteria, contributory institutional experts are a much smaller group. In this way, the distributional approach highlights the role of functionaries in institutional stability *and* institutional change. This section delineates the role of functionaries for stability—i.e., the development, maintenance, and repair of patterns. The next section examines patterns of institutional change initiated by functionaries. In their role as pattern-maintainers, functionaries ensure most large-scale institutional patterns, from militarised policing to routine taxation (Lawrence and Suddaby 2006), are confronted and 'felt' as real by the noncontributory majority. As a result, most people affected by the pattern experience it as objective, durable, and stable regardless of whether they approve of the pattern or not. They even feel like they 'live in' it, generating the sense (among noncontributors) that the pattern would persist even if no particular people were operating the ship.

3.2 | Pattern Reification

In an early intervention into the discourse on 'measuring culture', Jepperson and Swidler (1994) argued that cultural

elements lie on a continuum from *living* to *dead*. Some are highly contested and contestable (and therefore living); others are highly institutionalised and taken for granted (and therefore dead). In making this argument, they suggest, in passing, a distinction between 'most people' and 'specialists' as it relates to institutions:

> Perhaps some *specialists* directly debate, manage or reiterate the defining rules that make an entity a university: judges who must decide whether some organisation calling itself a university can really claim tax exemption, state legislatures attempting to enhance the stature of their state colleges by renaming them. Codified in charters and laws are articulated rules that make a set of relations a university, a corporation or a marriage. But for *most people* these are simply objective structures, not matters of 'culture'. Our point is that they are indeed culture, but culture *congealed* in forms that require less by way of *maintenance*, ritual reinforcement and symbolic elaboration than the softer (or more 'living') realms we usually think of as cultural.
>
> (Jepperson and Swidler 1994, 362–363, italics added)

In this passage, Jepperson and Swidler provide a vivid picture of both the phenomenological feel of centralised institutional patterns (as congealed, dead or static) and their strong dependence on the hidden-from-view labour of functionaries that belies that status because, from the functionaries' perspective, institutions are live, fragile and always dependent on someone (namely, themselves) 'showing up.' Centralised institutions thus lead a double life. Malleable, vulnerable, and in constant flux from the viewpoint of the small group of pattern-maintaining functionaries, congealed, big, powerful, and just 'out there' for most of us. Centrally institutionalised patterns require Weberian 'specialists'—whether they are truly 'without spirit' (Weber 2001, 124) is an empirical question—who engage in direct and deliberate pattern maintenance (see also DiMaggio 1988, 14). For functionaries, the patterns will seem more 'living' and perhaps 'softer', 'malleable', 'fragile', and far less taken for granted. For 'most people', the same patterns are taken-for-granted objective structures, sometimes decried (e.g., courts, the IRS), but typically ignored or kept in abeyance until they become relevant.

In *Economy and Society*, Weber (1922/1978:221, 234–36, 251, 425–65, 948–52, 967–88, 1314–1447) identifies numerous historical examples of functionaries maintaining institutional patterns in statecraft, military, private enterprise, charitable organisations, and religion. For Weber, the critical distinction between the functionary and the laity was the form of expertise commanded by the functionary. What linked all the distinct functionaries, however, was a committed purpose in institution maintenance: Namely, to act as the bureaucratic vehicles via which 'objective' tasks are carried out:

> Bureaucratisation offers above all the optimum possibility for carrying through the principle of specialising administrative functions according to purely objective considerations. Individual performances are allocated to functionaries who have specialised training and who, by constant practice increase their expertise. "Objective" discharge of business primarily means a discharge of business according to calculable rules and "without regard for persons."
>
> (Weber 1978, 975 original emphasis omitted)

Interestingly, in carrying out tasks perceived by the laity to be 'objective'—and sometimes even seemingly 'disinterested' (Bourdieu 1998)—functionaries also work to perpetuate the notion that institutions are discrete entities 'out there' in the world—containers, substances—that exist above and beyond people and their upkeep and repair activities; in Meyer and Jepperson's (2000), 116) memorable words, in 'enacting' institutional patterns, functionaries pull off the trick of seeming to be 'agents of no real principal'. Although people exposed to institutional patterns tend to reify them as objective entities more or less spontaneously, functionaries (in service of their duties) seek to generate this same impression more strategically.

3.3 | Institutional Work

Besides knowledge and motivation, the other way in which we may distinguish functionaries from the laity is in the *work* functionaries carry out to ensure that the majority of nonspecialists rely on these patterns and 'take them for granted' (Berger and Luckmann 1966). We point to two general (but not exhaustive) types of 'institutional work' (Simon 2013) by which functionaries achieve pattern maintenance: (1) *administrative work*, whereby the functionaries handle the background, often mundane task of keeping the machinery of institutionalisation operational and producing the expected physical evidence that the institution continues to function (e.g., sending and reading emails, disseminating forms, replenishing office resources, etc.) and (2) *regulative/coercive work,* whereby the functionaries exert 'coercive pressure' on nonspecialists and, more exceptionally, other noncompliant functionaries—whether physical or 'psychic' as noted by (Weber (1981), 163)—when the required adherence to the pattern (however minimal) is slipping or is being directly or indirectly challenged.

Institutional upkeep work includes both passive reminders of social expectations (such as when a university administrator emails faculty and staff about codes of conduct when representing the university off campus), legal structures such as formal rules and laws and perhaps even physical force or violence, a task which, naturally, may be delegated to its own set of functionaries or 'violence specialists' (Collins 2008). In this last respect, we should not equate 'institutionalisation' with the *lack* of regulation or coercion regarding the maintenance of that pattern among the laity—as in some strands of 'cultural-cognitive' institutionalism (Scott 2013, 79ff). This tendency is counterproductive, given that most institutional theories, from Durkheim onward, highlight the importance of regulative work in maintaining institutional patterns through meso-level practices such as policing, deterrence, and mythologising (Lawrence and Suddaby, 2006, 230). That said, the mundane tasks and

physical evidence involved in administrative work are often overlooked in institutional theory, yet they are proportionally more significant for institutional stability.

If functionaries devote most of their activities to reproducing and upkeeping one set of patterns, it follows that they cannot devote the same amount of time to reproducing other sets of patterns (Shi et al. 2017). Thus, becoming a functionary places one on a specialised occupational trajectory, and these trajectories sustain the patterns. The relatively totalising role of 'the priest' as the primary functionary in the Catholic Church is an extreme but clear expression of this tendency. We may also predict that, unlike the lay majority, who can take both the pattern's existence and persistence for granted, functionaries are likely more intimately aware of the practical and ethical complexity of pattern maintenance and the importance of their active role in this maintenance.

In centralised institutional regimes, only a few people maintain central forms of knowledge and activity; without these few, the contributory expertise may be lost entirely; this could be simple, like the proper pronunciation of the ineffable Tetragrammaton (Wilkinson 2015) or more extensive, such as much of Ancient Athenian religious practice. As only Athenian priests knew the proper way to perform ritual speeches, this contributory knowledge was lost, and only residual traces of their activities were documented. Priests are noted in the written record for 'their specialist role as ritual speakers on behalf of the *polis*, rather than in an attempt to preserve the content of their speech' (Hitch 2011, 118). Although serving lifelong tenures is one strategy for continuity (e.g., typical in the Athenian priesthood), specialised socialisation mechanisms are needed to pass on expertise lest it dies with those few (Simon 2013).

Similarly, there may be 'dirty little details' involved in maintenance with functionaries deciding at their discretion whether the laity needs not know of such unpleasantries, especially if such knowledge threatens the laity's 'belief' in (the unproblematic functioning of) the institution (Bourdieu 1980). Centralised institutions develop bifurcations of knowledge into the 'esoteric' (what few know) and the 'exoteric' (what 'everybody' knows). The former includes technically complex (and probably banal) knowledge while the latter may involve morally or ethically compromising knowledge about the 'real workings' of the institution, to which only a few insiders are privy. Horizontal knowledge-insulation processes keep esoteric knowledge from the prying eyes and ears of the laity (Reay 2010). Functionaries thus may possess exclusive views to the backstage where 'the sausage is made'. Revelation of this insider knowledge to the laity can disrupt (and, in extreme cases, pose existential threats to) the institutional pattern. For instance, dramatic deconversion and disaffiliation processes among Catholics following the revelations of decades of paedophilia among priests (e.g., Almási-Szabó 2024) show that no pattern, however old and robust, is invulnerable to 'loss of faith' among those who engage it mainly via interactional expertise.

Functionaries must also be recruited, motivated, and retained. Even if someone learns what is necessary to perform as a functionary, the set of patterns would still decay without a critical mass of people with this knowledge being *motivated* to engage in the activity. The job of specialised pattern maintenance performed by functionaries could be carried out in a purely perfunctory, ritualistic way, driven primarily by the extrinsic motivations provided by the institution to keep functionaries from shirking their repair and maintenance work (Merton 1940). However, it is unlikely that institutional patterns could be adequately maintained if all functionaries operated this way. Instead, as Weber argued, successful centralised institutional patterns are likely to be maintained and repaired by functionaries who develop an appropriate 'ethos' concerning the pattern (McDonnell 2020, 9ff). Functionaries that do not develop such an ethos may leave the field or fail to maintain the patterns.

Furthermore, if the social conditions for producing this ethos are weakened, the recruitment of properly motivated functionaries can be disrupted, as work on priestly vocations suggests (Fishman et al. 2015). In addition, institutional patterns maintained (and spread) by 'true-believing' functionaries will have a competitive advantage over patterns being supported for largely ritualistic or extrinsic reasons. These latter patterns may appear dominant yet 'collapse' rapidly in the face of competition from patterns fostered by alternative cadres of true-believing functionaries. Especially if the latter is also committed 'evangelisers' (Stinchcombe 2002) and news about this spread among the laity (e.g., aided by very public acts of others enacting different patterns and challenging the old patterns), negating their previous belief in the externality and obduracy of the old pattern in the population at large (Kuran 1991).

4 | Institutional Change

The distributional approach and the concept of the functionary have several implications for how we approach institutional change (Clemens and Cook 1999). This topic has, of course, received considerable attention in the literature. In the typical story, institutional entrepreneurs break out of the dialectic of institutionalisation—for example, by straddling 'domains' or exploiting 'contradictions'and the such as (see Rao et al. 2005)—altering the already established pattern. In a variant of this story, entrepreneurs operate at the 'interstices' (Morrill 2017) of a much 'larger' institution or even 'larger' institutional or bureaucratic field (McDonnell 2020). Nonentrepreneurs more or less mindlessly reproduce a practice, even when it is not in their 'best interest' to do so (Goldenstein and Walgenbach 2019). In this literature, via their structural position, the institutional entrepreneur either possesses a heroic perspective of the field or possesses a high capacity to 'apprehend institutional contradictions' and can thus identify viable pathways for change—as opposed to the more clearly antagonistic practice of 'disruption' (Lawrence and Suddaby, 2006, 235)—and accumulate the resources necessary to instigate change (Voronov and Yorks 2015); this cascade may lead to 'endogenous' institutional change; namely the alteration of dominant patterns by institutional insiders 'from within' (Greenwood and Suddaby 2006).

By acknowledging the importance of functionaries operating across or at the interstices of multiple institutional domains, the distributional approach draws attention to a relatively

undertheorized set of processes that account for institutional change. We outline three theoretical implications. We define entrepreneurship as the concerted effort by a functionary to mobilise contributory expertise in the service of producing more or less permanent change in an existing set of patterns. This definition of entrepreneurship is general enough to encompass all forms, whether economic, especially as developed in neo-Schumpeterian and Kirznerian approaches in Austrian economics (Kirzner 1997) or cultural or 'institutional' kind (Battilana et al. 2009; Lounsbury and Glynn 2001). In the distributional approach, an act of entrepreneurship happens if those reproducing a set of patterns change one or more of the patterns, combine existing ones with a new set of patterns, or expand the pattern's reach to those previously unexposed (Rao and Giorgi 2006). The mechanisms that produce change do not differ across kinds of entrepreneurship (e.g., economic vs. institutional). What differs is how functionaries mobilise the particular knowledge, processes, and activities necessary to transform older patterns into a newly formed set.

Nondistributional imageries rely on the notion of 'logic' and 'logic-blending' to account for institutional change (Hallett and Hawbaker 2021). For instance, Rao and Giorgi argue that what is involved in institutional entrepreneurship is 'exploit[ing] the pre-existing logic within the social system or import[ing] a logic from a different domain' (2006:270). In the distributional approach, change is not conceived as the alteration of a 'logic'(or template, code, recipe, etc.) abstracted from action, cognition, and feeling, but rather as the modification of particular local practices and forms of expertise. This proposition follows from the grounding of institutionalisation in the functionary's routine activities and accrued contributory expertise. Functionaries are less likely than the laity to 'take for granted' the production of a pattern of conduct; what is 'dead culture' for the laity is very much 'alive' for the functionary (Jepperson and Swidler 1994). Therefore, those at the heart of institutional activity (and often the most intrinsically committed) will also be those most likely to alter the pattern of conduct, often in service of a pattern's reproduction.

In the distributional approach, the extent to which a pattern has 'changed', or how novel a particular pattern may be, cannot be established by comparison to some global standard because there is no 'global' set of institutional containers (e.g., 'the state', 'the economy', 'religion' and so on) to be ostensibly pointed to. A pattern's novelty (or lack thereof) is based on a (temporally, spatially, and socially) situated perspective; what is novel here may be old news over there. The extent to which someone is entrepreneurial matters only for those already familiar, even if only minimally, with the local patterns, implying that, despite being vulnerable to volatile church/sect dynamics (Troeltsch 1992), decentralised institutions are unlikely to experience entrepreneurship as practical innovation. Even though we expect far more pattern variability in decentralised institutionalisation, the relevant actors are unlikely to perceive a potential entrepreneurial 'project' as new or useful. Because there are very few stable and unique positions in a decentralised field, it is unlikely (but not impossible) that the pre-existing activities and knowledge structures defining the field are even perceived as inefficient or problematic in the first place. In contrast, centralised institutions are far more likely to generate the phenomenological experience of entrepreneurship and 'permanent revolution' associated with endogenous change (Bourdieu 1998, 2017). There is a role of complementarity between the functionary and the entrepreneur.

There are two reasons institutional entrepreneurs should be more likely to arise among functionaries. First, because of their familiarity with persistent patterns and their possession of hard-to-gain and circumscribed knowledge and awareness of linchpin 'precarious values' (Lazega 2017; Selznick 1957), the functionary may 'see' the potential impact of novelty in a way that non-functionaries cannot, accounting for the 'vision advantage' of true entrepreneurs and their capacity to break stable institutional equilibria (Kirzner 1997); distinct from the 'structural' vision advantage of the network straddler (Burt 2004). Functionaries are structurally and culturally equipped to see 'cultural holes', opportunities, and contingencies should they arise. Second, with highly centralised distributions of contributory expertise and activity, only a relatively small number of functionaries need to alter their activity to generate significant institutional change. The innovation travels quickly among functionaries and is later imposed on the (complacent) majority, with or without their knowledge. Opposition from the laity occurs only when changes in the pattern of conduct require changes in the interactional expertise they have previously gained.

4.1 | Two Types of Institutional Change

In the distributional approach, the most socially consequential types of institutional change are those that affect the *distribution of knowledge and activity*. However, most contemporary institutional theories focus on *content-based mechanisms* to account for change—here, we borrow the Simmelian distinction between *form* and *content* (Lizardo 2019). Thus, although non-distributional approaches focus on the transformation of substantive contents, distributional approaches bring attention to changes in the relative insulation of knowledge, cognitions, and structures of feelings, focussing on formal processes of knowledge redistribution and re-organisation (on the horizontal plane) and processes of knowledge redescription and explicitation (on the vertical plane).

4.1.1 | Substantive Change

From the content-based perspective, institutional change happens when established logics, worldviews or schemas are (1) brought into places where they were absent before (Rao and Giorgi 2006), (2) when new logics are produced by blending two pre-existing ones ('hybrid logics') (Wry et al. 2014) or when new people are exposed to a pre-existing set of logics or worldviews (Schofer and Meyer 2005). These substantive mechanisms are importation, recombination, and expansion, respectively (see Figure 2, right).

Importation occurs when new—potentially deviant (Lazega 2024)—patterns compete with and eventually replace old patterns—arguably the most common content-based change in

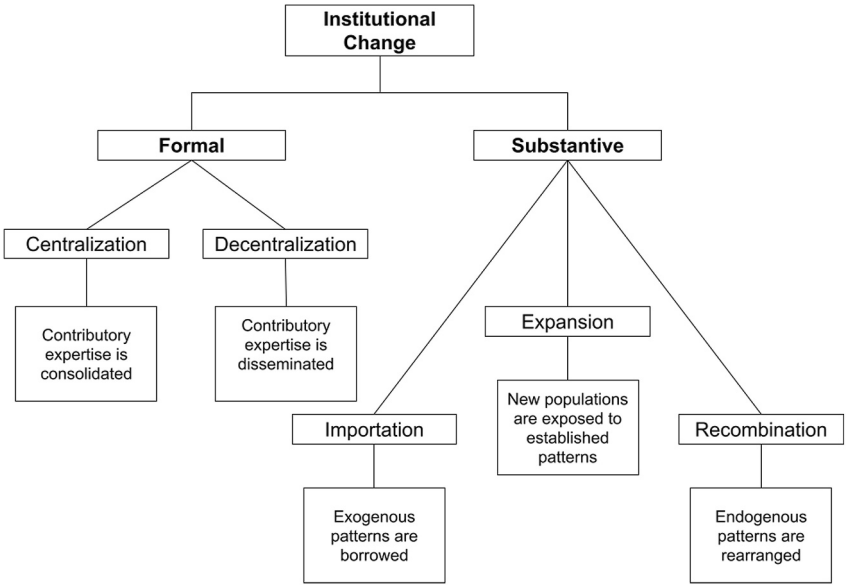

FIGURE 2 | Types of institutional change.

the 'institutional logics' literature (Thornton et al. 2012). For example, in a study of education publishing, Thornton and Ocasio (1999) find that the dominant 'editorial logic' (characterised by reputation and professionalism) of the 1950s and 1960s was displaced by the importation of a 'market logic' (marked by market position and financial performance) during the 1970s and onward. In the distributional approach, this amounts to the establishment of new patterns by a new cadre of functionaries unfamiliar with the old patterns, requiring retraining incumbent functionaries or recruiting new functionaries already possessing the new contributory expertise.

Recombination involves 'blending'(rather than replacing) the new 'logic' with the old 'logic' (Lounsbury et al. 2021). Recombination is commonly construed as a 'shock' introduced to the field in question, where the shock can be either internal (Rao et al. 2003) or external (Glynn and Lounsbury 2005). From a distributional perspective, recombination occurs when a new pattern of conduct emerges from 'mixing' two or more pre-existing patterns by a given set of functionaries—typically a pattern endogenous to the field with a pattern exogenous to it. Thus, recombination leads to two or more groups of functionaries joining to maintain the emergent pattern or retraining an existing group of functionaries into a hybrid order. Incumbent functionaries may be reluctant to adopt new contributory expertise, especially when external shocks prompt recombination beyond their immediate control.

Expansion involves the adoption or diffusion of a pattern of conduct by new populations or the forced assimilation of new populations, who are now impacted by an exogenous pattern of conduct they had no say in creating (Lounsbury et al. 2021). Diffusion is a critical concern in the 'world society' tradition (Meyer et al. 1997), whereby patterns that emerge in one location (typically the West) serve as 'models' adopted by governmental and nongovernmental organisations around the globe. Commensurate with the distributional approach, this literature suggests that the 'adoption' of new institutional contents (Rogers 2010) is achieved via the demographic transfer of those already with contributory expertise or the systematic training of a local cadre of functionaries who then serve as 'carriers' of world cultural patterns (Kalberg 2004). The spread of a pattern of conduct also occurs, for example, with state territory expansion, whereby people are (more or less) forced to acquire at least minimal interactional knowledge necessary to navigate new requirements.

4.1.2 | Formal Change

As noted, nondistributional approaches tend to emphasise 'content-based' mechanisms in accounting for institutional change to the neglect of changes emerging from the 'formal' (distributional) properties of the knowledge and activities that institutions depend on (see Figure 2, left). These kinds of institutional change are as likely to feature innovation, contestation, creativity, and conflict as the substantive mechanisms highlighted in recent discussions. The two kinds of formal institutional change naturally track our two types of steady-state institutionalisation. First, a previously centralised set of patterns may become increasingly decentralised. The second goes in the reverse direction: A previously decentralised pattern comes to be 'hoarded', expanded and refined by a set of incipient functionaries, creating a bifurcation among people separating the functionaries from the laity.

4.1.2.1 | Centralised to Decentralised. The transition from centralisation to decentralisation is perhaps the most drastic form of institutional change, as demonstrated by the well-worn example of the Protestant Reformation and the spread of literacy in early modern Europe (Eisenstein 2005). The centralisation and hierarchy of the Catholic Church led many to overlook that, as Weber argues, 'the Reformation meant less the entire removal of ecclesiastical authority over life than the replacement of the previous form of authority by a different

one' (1905/2002, 2 original emphasis). Medieval Catholicism is exemplary of a centralised institution. Control of the majority of the relevant population involved 'an extremely relaxed, practically imperceptible and scarcely more than formal authority'. As Weber argues, being Catholic made far fewer demands on the everyday lives of followers. Most of the (ritual) work of producing the 'Catholic Church' was consolidated in the hands of far fewer functionaries and kept away from the masses. Should members of the laity directly challenge institutional patterns, designated authorities (e.g., the Pope and Cardinals) will ensure mechanisms are in place to enforce compliance and repair the pattern, 'punishing heretics, but treating sinners gently' (Weber 2002, 2).

Protestantism, in contrast, was founded on the 'repudiation' of distant and relaxed control in favour of 'an infinitely burdensome and earnest regimentation of the conduct of life [*Lebensführung*], which penetrated every sphere of domestic and public life to the greatest degree imaginable' (1905/2002, p. 2). Most members of the relevant population had to invest considerable time and effort in training to maintain the new pattern, a key signature of decentralised institutionalisation. No activity, even previously 'profane' ones (most importantly, for Weber, work and industry), escaped the implications of the pattern—'penetrat[ing] every sphere of domestic and public life' (Weber 2002, 2). Work went from being a 'curse' and a 'burden' and thus outside of *la vie religieuse*, in the old pattern, to being a central part of the new pattern in the form of a 'calling'. Although many knew how to reproduce the patterns of conduct that they thought made up their faith, they likely also felt it to be potentially fragile, requiring everyone to have the extrinsic or intrinsic motivation necessary to devote time to its reproduction, requiring 'strong' (and for some unbearable) social monitoring and control systems precisely designed to punish 'shirkers' who were not doing their fair share of institutional upkeep (Iannaccone 1994), a mechanism quite absent (because superfluous) in Catholicism.

Centralised institutional distributions such as Catholicism incorporate many people with relatively high fidelity to the original patterns of conduct. Despite the contemporary Catholic Church boasting a membership of one billion (counting 3-times-a-year members), a Catholic should be able to attend mass in Vatican City, Manila, Madrid, or Boston and identify a few dramatic differences in overall conduct. In contrast, even as most significant (especially 'mainline') Protestant denominations have retained the trappings of centralised pattern maintenance, evidence of 'institutional legacies' (Greve and Rao 2014) of their decentralised origins is abundant. For instance, identifying core 'Protestant' practices and beliefs is relatively problematic (Green 1996; McNeill 1926; Woodberry and Smith 1998). Even within more delimited denominations, such as contemporary Evangelicals (Dayton and Johnston 2001; Guth et al. 1988), the services of one Evangelical church are likely to differ from those of another Evangelical church in the same city in significant ways (e.g., the relative participation of women). Finally, although both Protestantism and Catholicism are subject to controversy over practice, interpretation, scriptural reading and values, only in Protestantism do we observe periodic 'schisms' and 'church-sect' split dynamics, whereby a new set of actors, having all the knowledge to produce the pattern among themselves decide to 'pack it up' and choose the 'exit' option to form a new (labelled) pattern (Troeltsch 1992).

4.1.2.2 | Decentralised to Centralised. Contemporary attempts to 'democratise' access to and the production of scientific knowledge represent an incipient (and obviously not yet successful) attempt to decentralise a centralised pattern (McCormick 2009). However, the *longue duree* of Western science followed the opposite path, beginning as a decentralised gentlemanly hobby among a set of (usually aristocratic) equals (non-experts made many early scientific discoveries in their spare time) and turning into the unwieldy, anti-democratic, centralised 'Golem' that it is today (Collins and Pinch 1998). Indeed, the decentralised nature of early Western science has led historians of science to frequently question what, exactly, they are historians *of* Daston and Most 2015, 382, when Western science began (Lindberg 2008, 1) and the extent to which conceptions of what constituted 'Western science' was the product of classification practices within the Western world specifically or was influenced by global perceptions of Western science, especially in nineteenth-century Egypt and China (Elshakry 2010, 102).

The functionaries in the early decentralised era of Western science mainly were American and British Protestant missionaries who incorporated Western science into their proselytisation—British missionary John Fryer started one of the first science magazines in China in the late 1870s, for instance (Elshakry 2010). These missionaries are exemplars of functionaries during a period of decentralised institutionalisation: experts who maintain patterns of little consequence for 'outsiders', but whose entrepreneurial goal is to expand the cultural power of their set of patterns to larger populations, so that participation will evoke similar meanings across those populations (Lizardo 2016).

Now consider modern 'bureaucratised' Western science, with contributory expertise typically reserved for highly-trained professional scientists. Being seen as a credible scientist stems, foremost, from educational attainment: the ability to work in science flows from academic training, leading to a tight coupling between the supposed ability to conduct science and credentialism or at least using academic credentials as a 'closure' mechanism to limit employment opportunities to select status groups (Tholen 2020, 286, 289). People can be divided into those who possess a high level of contributory expertise in the pattern (the scientists, data analysts, engineers, professors, etc.) and those who now depend on these functionaries to 'see' the particular pattern (whether wanted or unwanted) reproduced. This newly formed 'laity'may only possess interactional expertise with respect to the new, more complex pattern and cease being contributory participants (as they were in the decentralised stage).

4.1.2.3 | Centralisation and Hierarchy. Centralisation and bifurcation of people into functionaries and laity imply an increase in 'hierarchy'. In the distributional approach, however, hierarchy and centralisation are analytically distinct. Knowing that a pattern is centrally institutionalised tells us that its maintenance also depends on any given configuration of power relations. The concentration of expertise and responsibility for

institutional upkeep, maintenance and repair on functionaries is not equivalent to the concentration of authority in the same group (M. Weber 1978, 948–9).

Centralised institutionalisation may result in a traditional hierarchy in which the majority is at the will of a powerful minority because they have monopolised the means of producing a set of patterns, as was likely the case with the emergence of historical state systems (Mann 1986). Alternatively, the majority may afford the leisure of ignoring how certain institutionalised patterns are maintained and appreciate the various outputs produced by functionaries. Some of these downstream goods, such as the outputs of human resource offices, may even serve a hierarchy-attenuating function. However, functionaries may realise that, as the few with the requisite knowledge, they can use their unique position to gain power (Dobbin and Sutton 1998), providing an incentive to further manipulate knowledge distribution in their favour. For instance, priests' monopoly over the 'literacy' pattern and its functional use for large-scale coordination and the 'disciplining' of large populations by state authorities gave this class more power than we might otherwise expect (Giddens 1987).

5 | Conclusion

In the preceding, we examined the relatively neglected image of institutions as *distributions* of knowledge and expertise across people (Carley 1991, 332; Reay 2010). Specifically, we argue that institutionalising any set of patterns involves a reorganisation or radical change in the distribution of activities and knowledge. We contrast this 'formal' approach to the analysis of institutions and institutionalisation with the substantive imagery dominant in the literature, in which change occurs via the creative recombination and bricolage of institutional elements by agentic actors who bridge institutional boundaries or occupy the interstices of institutional spheres.

Notably, the distributional approach is concerned with theorising institutional *process* over established patterns, puts its focus on the routine work of upkeep, maintenance, and, every so often, the transformation of institutional patterns, localises and theorises the origins and motivations of institutional entrepreneurs, and aims to provide strong micro-foundations for processes of institutional emergence, maintenance, and change. Our proposed approach is broadly ecumenical, drawing liberally from classical sociological institutionalism (including neo-and contemporary institutionalist approaches), agency-centric work in management and organisational studies (inclusive of embedded agency and institutional work perspectives), and relatively under-exploited lines of thinking in the classical tradition of social-phenomenology and Weberian sociological theory.

In the distributional imagery, patterns of institutionalisation can be exhaustively accounted for by considering the distribution of three elements: Activity, knowledge, and structures of feeling. The contributory expertise necessary to (re)produce patterns of regularised conduct are *unevenly distributed* and often concentrated in the hands of specialists or, following Alfred Weber (2007), *functionaries*. Two steady-state distributional outcomes are empirically likely, which we refer to as *centralised* and *decentralised* institutionalisation. Decentralised institutionalisation is constrained to relatively small communities (due to a bottleneck in knowledge acquisition and behavioural commitment). It is subject to 'church/sect' dynamics, which guarantee field-like dynamism but also lead to instability. Centralised institutionalisation can enjoy economies of scale, is relatively low cost, can be embodied in habits and routines, and remains largely in the background of attention for the laity making up part of the 'common sense' of how things get done. The upkeep role of functionaries (e.g., a literate priesthood) builds the 'big' centralised institutions (e.g., religion, debt economies, expertise and the state) for long temporal scales (e.g., millennia). Functionaries are central to the distributional formulation, underscoring their role in the ongoing 'upkeep' of institutions and offering a new perspective on the routine affinity between stability and change.

5.1 | A Distributional Research Agenda

In practice, a research agenda for a distributional approach to institutional analysis can be divided into the (1) formal and (2) substantive aspects of institutionalised patterns of conduct, followed by a consideration of the (3) intellectual and practical significance of studying functionaries. First, analysts must specify whether patterns of interest are centralised or decentralised, as this determines whether we seek out functionaries (as in most current work in organisational studies of expert and professional fields) or whether those sampled at random are equally suited as informants. For instance, Small's (2004) study of 'Villa Victoria' could be seen as an examination of decentralised patterns maintaining a particular 'narrative' of the neighbourhood; as such, local sampling of lay informants was adequate.

There is also the question of whether studying centralised institutions (or the centralisation of a previously decentralised institutional pattern) ipso facto means that we must study power-dynamics and hierarchy. As noted before, centralisation is empirically distinct from hierarchy. A movement towards either centralisation or decentralisation can be accompanied by either a decrease or intensification of hierarchical distinctions, raising the question: Under what circumstances those who monopolise contributory expertise—and therefore considerable influence over patterns—are both at the bottom of a hierarchy, thus engaging in institutional reproduction and their subjugation simultaneously? In the standard container/substance approach, this is most people, most of the time—save for the few heroic change agents. In the distributional approach, however, this becomes a critical empirical question.

Second, both centralised and decentralised patterns must deal with recruitment and training (Schneider 1987). However, some decentralised patterns are greedy, requiring a lot of time and energy from all (Shi et al. 2017); the continuous addition of new members to the fold and the placement of procedures and safeguards ensure that new members are trained to reproduce the pattern (e.g., 'socialisation'). Protestant evangelicalism is a

prototypical example of this (Smilde 2007). Similarly, turnover and retention will be a concern for the persistence of both kinds of institutionalisation (Shi et al. 2017), but for centralised patterns, turnover matters primarily for functionaries. The majority can come and go—e.g., immigration and emigration for nation-states—without much change. However, demographic shifts among functionaries pose a prime threat to institutional persistence, exemplified by the Catholic priestly recruitment crisis (Fishman et al. 2015). Thus, research should examine the mechanisms by which functionaries are retained, particularly after investing time and resources to acquire contributory knowledge. In addition, deinstitutionalisation and even the 'death' of some institutions could be recast as studies of the failure of mechanisms for recruiting, socialising, and retaining functionaries (Schneider 1987).

As bottlenecks of institutional reproduction and change, a primary question is where functionaries come from—also a classic Weberian question. Such a question dovetails with the renaissance of elite studies in sociology (e.g., Khan 2012), in particular, those considering the educational and career pipelines of functionaries: how certain people get these positions and what sort of contributory knowledge they acquire along the way, but also what happens when contributory experts may be 'over-produced' for the currently available roles. Although presidents, prime ministers, and CEOs are perhaps more typical functionaries—and of primary concern for power-elite theorists—they are not always the most consequential, as we must also look to 'the captains of their higher thought' (Mills 1956, 4). Thus, scrutinising 'pipelines' is of utmost importance for a distributional approach, not only for quintessential cases of centralised institutionalisation but also for maintaining (and changing) the myriad decentralised patterns. In this way, the distributional approach also has implications for other areas of sociology. Consider, for instance, mass incarceration in the United States. Rather than consider this trend as precipitated by changes in intangible logics or templates, recent research has revealed that prosecutorial discretion—that is, the directed and 'free' activity of flesh and blood functionaries—played a crucial role in the rise in rates of incarceration (Pfaff 2017), a pattern not confined to the United States (Luna and Wade 2012). The same discretionary activity by a new breed of functionaries is also largely responsible for recent decarceration trends.

What the distributional approach entails, however, is that real institutional change is not an abstract process of swapping one logic or template for another but of constraining the activity of functionaries (by using other functionaries) and reforming the organisations in which functionaries acquire their contributory knowledge and hone their upkeep and maintenance activities.

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