THE MORE THINGS CHANGE, THE MORE THEY STAY THE SAME: INSTITUTIONAL MAINTENANCE IN THE FACE OF SOCIAL AND TECHNOLOGICAL CHANGE IN AMERICAN PUBLIC LIBRARIES, 1876-2006

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DISSERTATION ABSTRACT

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Institutions are generally assumed to be stable, but recent research has focused on how that stability may be overturned to create institutional change. The assumption of stability has led to a lack of research on the flip side of change, maintenance, even though we cannot fully understand change without understanding the forces change agents work against. By examining more than a century of American public library discourse, I develop the construct of core ideas and a model of the maintenance of these institutions. Core ideas are those institutionalized ideas at the heart of a field that act as touchstones of a field's work and identity. Like other institutions, core ideas may be both added to and subtracted from a field and require maintenance through reinforcement and reinterpretation to endure. The model of maintenance of core ideas shows how core ideas are maintained in the face of social and technological change through use, as actors draw on core ideas to justify or deny accounts of practice, which reinforces, reinterprets, or undermines existing or proposed core ideas. In developing a model of maintenance I also examine how core ideas illuminate the internal workings of institutional logics and explore how the multivocality of core

ideas allows and even supports multiple logics within a field.

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CHAPTER I

INTRODUCTION

Throughout their history, public libraries in the United States have described themselves as central in providing both continuing education and the educated electorate needed for an effective democracy. These core concepts have manifested over the years in a variety of practices, using a variety of technologies, but have remained steadfast over one and a half centuries. For example, in the preamble to Massachusetts' 1847 law making it possible to support public libraries with taxes, both concepts are called out:

> Whereas, a universal **diffusion of knowledge** among the people must be highly conducive to the **preservation of their freedom**, a greater equalization of social advantages, their industrial success, and their physical, intellectual, and moral advancement and elevation….[T]here is no way that this can be done so effectively as by the formation of Public Libraries…

Melvil Dewey, one of the early leaders of the public library movement, reiterated in 1886 the idea of the library as an educational institution: "The library is the real **university** of the future…" A manual on library training from 1921[1] highlighted these ideas as well:

> "The public library is everywhere recognized to-day as having a place side by side with the school. It has been called **'the people's university;'** it is also being recognized as a most effective **agency in training for democracy**."

---

[1] Friedel, J. H. (1921). Training for librarianship: Library work as a career. Philadelphia: J. B. Lippincott Company.

Over time, the idea of the library as bastion of democracy even moved beyond the library field, with Franklin Delano Roosevelt saying in 1942 that "Libraries are … essential to the functioning of a **democratic society**… and libraries are the great tools of scholarship, the great repositories of culture, and the great symbols of the freedom of the mind." In spite of the numerous technological and social changes that have affected libraries since their inception in the mid-nineteenth century – including databases, the Internet, and a growing emphasis on the library as community center – the library field has continued to profess these central ideas. Nancy Kranich, the former president of the American Library Association said in 2001:

> "Libraries are the **cornerstone of democracy** in our communities because they assist the public in locating a diversity of resources and in developing the information literacy skills necessary to become responsible, **informed citizens** and to participate in our democracy."

It may not immediately seem surprising that an established organizational field should maintain its core ideas over time. An organizational field is a community of organizations that share a common system of meanings, whose members "interact more frequently and fatefully with one another than with actors outside the field" and who share a set of core ideas (Scott, 1995: 56). These core ideas – the taken-for-granted rules, norms, and beliefs – are institutions (Hoffman, 1999; Scott, 2008a), and are often described as stable. This stability sometimes leads to the assumption that they do not change, even though recent research has begun to explore the ways in which institutions do change. What is

interesting about highly institutionalized organizational fields such as libraries is that they do not reject change, but also do not refute their long-standing ideas. Rather than revising the norms and beliefs that make up the framework of the field, changes are somehow fit into this framework, sometimes to the point of becoming so taken for granted only the longest memories recall older patterns.

Although the institutionalized ideas of such a field may not change, social and technological changes often have significant effects on the practices within the field. Libraries have moved from being warehouses for "good" books, guarded zealously against the careless masses, to becoming community centers driven by high circulation of not only print but also audiovisual materials. All of these changes have been controversial in their time, but all have been fitted into the institutional ideals of the field. How are the institutions within a field maintained in the face of social and technological change, if at all? More specifically, how are these particular institutions, core ideas, maintained?

Researchers have called for a greater understanding of how institutions persist (Scott, 2001), and have gone so far as to say that institutional maintenance

> "may be a more fundamental question for institutional research, in many respects, than the question of how institutions are created… the real mystery of institutions is how social structures can be made self-replicating and persist beyond the life-span of their creators." (Lawrence & Suddaby, 2006: 234)

Using a discourse analysis of over 10,000 texts, I examine the ways in which actors maintain institutions in the face of social and technological change

in the one hundred thirty year history of American public libraries. I focus my inquiry around developments within the library field such as the adoption of new technologies and practices, to isolate the mechanisms used to construct these new technologies and practices as part of the existing institutional framework. I document the change and maintenance of the core ideas of the field, and how actors within the field responded to pressures from technological and social change, as well as developing a process model of how field actors are able to maintain, and change, the core ideas of the field through the field-wide discourse. I find that actors tailor their discursive actions to the challenges of specific eras' social and technological changes, but that these actions can be encapsulated in five mechanisms that describe the interactions between the field's core ideas and accounts of practice. Actors draw on core ideas to (1) justify or (2) deny the validity of specific accounts of practice and, in this process, maintain the core ideas they draw on by (3) reinforcing or (4) undermining their position in the field or (5) reinterpreting them to better address the field's current challenges. Not all core ideas are maintained, however, and those that fail do so because they are unable to be reinterpreted effectively. The maintenance of core ideas allows a field to hold its center, even while practices may change dramatically over time, in part because the stability of core ideas supports a relatively stable identity, mitigating the identity-threats that often cause resistance to change.

In Chapter II, I will explain the theoretical motivation for this study, particularly why an examination of maintenance is useful for the institutional literature. In Chapter III, I delineate the methods and analysis used in this study.

Chapter IV contains a brief history of the public library field, exploring the four periods of the field and their major events. In Chapter V, I explore core ideas and how they are added to, removed from, and maintained within the field. In Chapter VI, I examine the specific discursive actions actors take in maintenance of core ideas and develop a model of the maintenance of core ideas in discourse. Chapter VII contains the summary of my findings and the discussion of the implications of those findings for organizational theory.

CHAPTER II

THEORETICAL MOTIVATION

In order to understand the need to develop a fine-grained explanation of institutional maintenance, we must understand the development of institutions literature leading to this point. Institutional research is rooted in a desire to understand the underlying, taken-for-granted systems of practice and belief in our social reality (Berger & Luckman, 1967). Institutions are generally understood as enduring social patterns (Hughes, 1936; Zucker, 1983), which are relatively stable and self-reproducing, barring exogenous jolts that force a field to reconsider their validity (Jepperson, 1991). Organizational theorists focus on institutions within organizations and organizational fields, exploring how they create an environment in which organizations can effectively interact with one another and define their field (DiMaggio & Powell, 1983).

This view of institutions led to a research agenda focused on why organizations accept the constraints of institutions. Researchers examined why organizations follow institutional norms even when they impeded performance and found that organizations benefitted from this decoupling in increased survival because they were seen as legitimate by observers of the field (Rowan & Meyer, 1977). Organizations adopted practices and structures from others in their field because it allowed them to more effectively interact with their primary environment, other organizations (DiMaggio & Powell, 1983) and because professionals' formal education and cross-organizational networks helped to

normalize practices across organization boundaries (DiMaggio, 1991; Scott, 2008b). New organizations and new industries needed legitimacy, which was more easily conferred when organizations adopted structures and practices that were familiar to those in their environment (Aldrich & Fiol, 1994). Researchers also examined different forms of legitimacy, and how legitimacy could be gained, maintained, and repaired (Suchman, 1995).

As researchers began to understand issues of isomorphism, diffusion of norms and practices, and legitimacy, all of which constrained organizations to remain the same, they began to recognize that in spite of the tendency to stability, institutions did sometimes change. The subsequent research focused on how and when change happened, with much of this research examining how new institutions are formed. In a study of the radio industry, researchers found that change was most likely to come from peripheral actors who were not invested in current norms and were unable to access resources effectively (Leblebici, Salancik, Copay, & King, 1991). Others found that entrenched actors were likely to create change because they often bridged multiple fields and so were familiar with multiple sets of institutional norms (Greenwood & Hinings, 1996; Kraatz & Moore, 2002; Suddaby & Greenwood, 2005), or were able to deploy their resources to support new practices (DiMaggio, 1991). Zilber (2002) looked at the way actors were able to institutionalize new practices by reinterpreting the meaning of routine actions such as meetings. Others have examined the role of rhetoric in proposing (Suddaby & Greenwood, 2005) and legitimizing new institutions (Green, Li, & Nohria, 2009).

Research has also begun to examine the process of deinstitutionalization, how institutions may fail to reproduce themselves. Oliver (1992) opened the discussion by exploring the circumstances under which institutions were prone to deinstitutionalization. Researchers have found that practices may be deinstitutionalized when they are problematized in the public discourse (Maguire & Hardy, 2009), when a field is split by dissent over a given institution (Greenwood & Hinings, 1996), or when the largest firms in a field change their practices (Greenwood, Suddaby, & Hinings, 2002). As with institutionalization, rhetoric also plays a part in deinstitutionalization, allowing, for example, the reconceptualization of institutionalized organizational forms until they become illegitimate (Davis, Diekmann, & Tinsley, 1994).

Shifting focus from the stability of institutions to the changeability of institutions renewed discussions around agency that had troubled institutional research from its inception. Actors are embedded in institutions and the taken-for-granted nature of institutions implies that embedded actors are less likely to intentionally question or overturn institutions because they are insulated from exogenous ideas (Uzzi, 1997). Institutional theory has thus often taken an over-socialized view of actors, assuming embeddedness means actors are fully constrained by institutions (Granovetter, 1985; Silverman, 1971). This embeddedness has long been seen as a deterrent to agency in institutional change, but actors' social positions can help them overcome their embeddedness (Battilana, 2006; Fligstein, 1997; Suddaby & Greenwood, 2005). In some cases, where actors are sufficiently skilled within their field's social reality, their

embeddedness can help them to institutionalize new roles and practices, because they are able to better understand how to link these new roles and practices into existing systems of belief (Reay, Golden-Biddle, & German, 2006)

Three major scholarly approaches have examined institutional change and have taken varying stances on agency in institutions: institutional logics, institutional entrepreneurship, and institutional work. Institutional logics research often seems to sidestep the question of agency (Willmott, 2010). Institutional entrepreneurship research, on the other hand, valorizes the agency of influential actors, to the point that it has been criticized for portraying institutional entrepreneurs as hypermuscular supermen (Suddaby, 2010). Institutional work researchers have turned their focus specifically on agency, focusing not on heroic actors, but on the everyday actions of people in the field (Hwang & Colyvas, 2010; Lawrence, Suddaby, & Leca, 2011; Lawrence & Suddaby, 2006).

The institutional logics view argues that change occurs when a field has more than one logic to choose from, and that institutions are maintained when no viable alternative logic is available. An institutional logic is "a set of material practices and symbolic constructions that constitute organizing principles for broader suprarational orders" (Lok, 2010: 1307, following Friedland and Alford, 1991). New logics may be introduced via technological or social changes in or around the field, and these new logics disrupt the reproduction of the current order, allowing the field to change its practices and even identity (Lok, 2010; Rao, Monin, & Durand, 2003).

Originally conceived by Friedland and Alford as societal-level constructs, such as the market or the family, that influenced fields and individuals (DiMaggio, 1997; Friedland and Alford, 1991), many researchers have operationalized logics as patterns of practice within a given field that may be related to one or more of these overarching constructs. For example, Thornton, following the original conception of logics, examined the change in academic publishing from being aligned with a professional logic to being aligned with a market logic (Thornton, 2002). An example of the field-based logic is seen in the examination of variations in banking practice based on the availability in different cities of the trustee and performance models of banking (Lounsbury, 2007). Researchers have examined changes in organizational governance (Thornton, Jones, & Kury, 2005), and executive identity (Meyer & Hammerschmid, 2006), as well as the creation of new practices (Lounsbury & Crumley, 2007). Additionally, researchers have begun exploring how actors navigate fields with multiple, conflicting logics that are not resolved (Purdy & Gray, 2009; Reay & Hinings, 2009). Most logics research places the power of change in the environment, seeing changes in society or technology as the motivation for change, rather than the agency of individuals (Willmott, 2010).

Institutional entrepreneurship research focuses its attention on central actors within the field, whether collective or individual, who have the ability to envision new institutions and to enact change within institutions in spite of pressures for conformity. These influential actors are sometimes aided in their work by disruptions in the field, or by entering a field when it is still in the

process of formation. Studies of institutional entrepreneurship have examined how actors are able to institute new technological standards (Garud, Hardy, & Maguire, 2007; Garud, Jain, & Kumaraswamy, 2002), new organizational forms (Greenwood & Suddaby, 2006), and new environmental regulations (Child, Yuan, & Tsai, 2007).

Additionally, researchers have revisited the social constructionist roots of institutional theory to examine ways in which agents are able to affect institutions in the way they construct meaning. In a study of Kodak, researchers found that institutional entrepreneurs create change by theorizing new technology as jolts, requiring the field to respond (Munir, 2005), as well as how organizational actors can use public discourse to construct meaning around new technologies (Munir & Phillips, 2005). Other research in this stream has examined how field wide sense-making around a crisis can both disrupt and maintain the institutional order (Zilber 2007). This last study, though presented as institutional entrepreneurship, has more in common with the third approach and its often collective view of agency.

Institutional work focuses on change through the everyday actions of actors, individually or collectively (Lawrence & Suddaby, 2006). This view follows a structurational view of change, in which institutions are supported or undermined by the enactment of macro level institutions in micro level behavior (Barley & Tolbert, 1991; Leblebici et al., 1991). This attempt to understand the agency of actors helps to rebalance the effort to account for both structure and agency in institutions (Kaghan & Lounsbury, 2010). Researchers using this

approach have examined how actors create, maintain, and disrupt practices within a field (Zietsma & Lawrence, 2010), the need for reasonability in justifying beliefs and practices (Schildt, Mantere, & Vaara, 2010), and the role of professions in creating institutional change (Suddaby & Viale, 2011). Actors are able to problematize institutionalized practices and beliefs through discourse, undermining their support in the field (Maguire & Hardy, 2009), and can hurry their passing by offering alternatives as solutions to the problems they conceptualize as arising from the current practices and beliefs of the field (Greenwood et al., 2002). This structurational view of agency admits the ability of individuals to act but does not create them as supermen, leaving them embedded in their institutional environment but yet able to act with intention.

With the majority of the literature focusing on change, however, there is another imbalance in our view of agency. Both institutionalization and deinstitutionalization have received attention, but between these events, institutions are still often assumed to simply reproduce themselves automatically. If actors have agency to create change, should they not also have the agency to maintain the status quo? Earlier institutional researchers noted this mirrored agency (DiMaggio, 1988; Oliver, 1991) but few studies of institutional change have explored agency in resistance to change or even more mundane maintenance when not confronted with forces for change (Garud et al., 2007; Marquis & Lounsbury, 2007). The studies referenced in the previous section have shown that institutions can be changed and destroyed, and therefore it is reasonable to expect that institutions must also be actively maintained if they are

to remain (Zucker, 1988). Of the three views of institutional change described above, only institutional work has directly addressed the problem of maintenance.

INSTITUTIONAL MAINTENANCE

Institutional maintenance is the work done by actors within an organizational field to maintain its institutions between the periods of institutionalization and deinstitutionalization. Lawrence and Suddaby (2006) examined the idea of institutional maintenance in their development of the institutional work lens for examining institutions. Institutional work "describes the practices of individual and collective actors aimed at creating, maintaining, and disrupting institutions" (Lawrence, et al., 2011). The institutional work lens sees institutions as dynamic and agentic: they are created, maintained, and destroyed by actors who are not cultural dopes (Hirsch & Lounsbury, 1997), but culturally competent actors able to understand and interact effectively with their institutional environment (Giddens, 1984). These actors do not need to be heroic or hypermuscular to enact change, because change manifests in the everyday actions of actors within the field (Riaz, Buchanan, & Bapuji, 2011; Suddaby, 2010). In this view, institutions are socially constructed, built from the words and ideas of their participants (Munir, 2005), and enacted by their actions (Barley & Tolbert, 1997).

This approach is not in direct opposition to the widely held understanding that institutions are self-reproducing, but asks us to define the means of that reproduction, instead of taking them for granted (Dacin, Munir, & Tracey, 2010). Maintenance in institutional work does not require innate stability or the absence of change, but is the work done by actors to sustain an institution in the face of change (Lawrence & Suddaby, 2006). Institutional maintenance, then, is not the rejection of change, but the adaptation of new ideas and technologies to current norms, socially constructing these new ideas and technologies (Munir & Phillips, 2005) to fit within the existing institutions.

Lawrence and Suddaby (2006) note that although institutions are associated with mechanisms of social control, few are strong enough to require no maintenance work. This work consists of "supporting, repairing, or recreating the social mechanisms that ensure compliance" (Lawrence and Suddaby, 2006: 230) and they identify six such mechanisms. Three (enabling, policing, and deterring) promote adherence to rule systems, while three others (valorizing/ demonizing, mythologizing, and embedding and routinizing) focus on reproducing existing norms and belief systems. Enabling work includes the creation of rules that support an institution, such as regulations or the creation of authorizing agents. Policing uses monitoring and enforcement of rules to ensure compliance with institutionalized rules and norms. Deterring, last of the rule-based mechanisms, puts in place barriers to actions that could lead to institutional change. Valorizing and demonizing are the processes of evaluating fellow actors' behavior as examples of enacting or failing to enact the normative

foundations of an institution and publicly displaying those evaluations, while mythologizing is the development of historical stories that reinforce the normative underpinnings of an institution. Finally, embedding and routinizing bridge the gap between institutional ideas and participants' everyday lives and routines.

Little empirical research has focused directly on maintenance (Lawrence & Suddaby, 2006; Scott, 2001), but research focused on other aspects of institutions and organizations has touched on the idea. Berger and Luckman argued that dominant actors maintain institutions by imposing a particular symbolic order (Berger & Luckman, 1967). Jepperson (1991), in exploring democratic elections in Western democracies, found that even such highly institutionalized practices needed large amounts of maintenance. Lawrence and Suddaby (2006), in developing their idea of institutional maintenance, searched numerous institutional studies to locate the previously mentioned maintenance mechanisms. The empirical studies they cite rarely focused on institutional maintenance, instead mentioning these mechanisms as part of their description of institutions they were studying for other purposes. For example, Angus (1993) examined the role of gender in organizational culture, and in the process described ways that the culture of a boys' school valorized masculinity while demonizing femininity, partially in reaction to the hiring of female teachers in positions once held by Catholic brothers. The brothers also mythologized the founders and alumni of the school as representing all that was admirable, emphasizing their masculine qualities. In a second example, Leblebici and co-

authors examined the history of radio in the U.S. to explore how institutional practices change over time (Leblebici et al., 1991). Lawrence and Suddaby saw the creation of federal agencies to control allocation of airwaves as an example of a maintenance mechanism, namely enabling work, or the creation of rules that support institutions.

A few studies have looked directly at institutional maintenance. A study by Zucker (1977) created an experiment to test cultural persistence based on the level of institutionalization in the environment. Participants received standards from the experimenter's confederate, and were more likely to pass those standards on to new participants when the environment was more institutionalized (e.g., when participants were told they held an office in charge of the activity). An awareness of institutional pressure led to greater transmission of cultural norms. Although this study showed that awareness of institutionalization increases transmission, it did not look at the ways in which transmission might occur in an actual organization, focusing instead on the cognitive reaction of individuals to the idea of institutionalization.

Miller (1994) studied the longevity of the Basel Mission, an evangelical organization that survived for almost two centuries. He found the cause was a combination of several factors: recruitment from a limited pool of candidates already likely to share many norms and values; careful indoctrination of new members into the institution's narrative; a strong authority structure including formal procedures of mutual surveillance; and a sense of specialness that helped them to retain their internal norms against outside pressures. Many of these

mechanisms resemble those outlined by Lawrence and Suddaby: mythologizing to support the institutional narratives, policing of members, and valorizing the special qualities of the institution. This case is more extreme than most organizations, which have far less control over their members.

Another study examined transmission of institutionalized practices between individuals by looking at a specific institution: formal dining at Cambridge Colleges (Dacin et al., 2010). Dacin and co-authors found that the performance of formal dining maintained the institutionalized stratification of British society in several ways. First, the performance itself legitimated this stratification by enacting it nightly. Second, the experience transformed participants' identities to fit within existing institutional ideals. Finally, the practice of dining inculcated participants with the norms, values, and practices that allow them to take their place in the upper echelons of their stratified society. They argue that macro institutions' survival is rooted in micro events, and that these micro events are in turn influenced by the macro institutions, echoing Hedström and Swedberg's (1998) examination of mechanisms as the links between micro and macro events.

Zilber (2009) took a different view of institutional maintenance, examining symbolic institutional maintenance, the travel of stories across social levels. In her ethnographic study of a rape-counseling center in Israel, she examined the ways that societal level stories were absorbed into first organizational level and then individual life stories of organization members. This retelling and absorption of macro level stories to the micro level in turn

informed the macro stories, or meta-narratives. The stories at all levels were used to make sense of every day events, modifying the meta-narratives to fit individual experience. Maintenance activities included adjusting individual level stories to match the meta-narratives, while continuing to adapt them to individual experience. Zilber argues that maintenance requires that institutional members consume the symbols of the meta-narratives, weaving them into their organizational and personal realities. This aligns with Lawrence and Suddaby's (2006) mechanism of mythologizing.

Each of these studies illuminated some aspect of institutional maintenance. This project builds on past maintenance research in several ways. We know that maintenance happens, but have not developed empirical evidence of the mechanisms of maintenance actors use to maintain institutions. In addition, most research around maintenance has focused on maintenance of practices, rather than the underlying core ideas of a field. To answer the question of whether and how core ideas are actively maintained over time, I examine the case of public libraries, spanning over a century of history. Through development of this case and examination of 130 years of the field's discourse, I am able to examine the development and maintenance of a set of institutions, the core ideas of the field, which support a dynamic stability within the field. Focusing on discourse helps to highlight both the processual and temporal aspects of the phenomenon, and allows me to develop theory that addresses multiple levels of the institutional environment (Hardy, Lawrence, & Grant, 2005). Because of the breadth of this case, I am able to examine several period's in the field's

development, starting with the field's formation, as well as the effects of numerous technological and social changes, where previous studies have generally focused on a specific event at a specific point in time. This allows me to follow the maintenance of these institutions through multiple stress points within the field's history and examine how actors are able to maintain these core ideas while adapting to the changes within and around the field. Because of the several periods, I am able to explore the mechanisms and enactment of maintenance against the background of different temporal and social contexts, allowing the development of a process model of maintenance through discourse (Langley, 1999). Institutional processes are best studied at the field rather than organizational level (Lawrence & Suddaby, 2006). Because libraries are a professional field, they are particularly well suited to understanding field-level dynamics (Scott, 2008b) such as the maintenance of a field's core ideas.

In the following sections I will lay out the study in greater detail. First, I will describe the methods used to develop and analyze the case. Next, I will present a brief history of public libraries in the United States, from the predecessors of the library field to the current struggles with information technology. In Chapter V, I will examine core ideas, what they are, how they are added or removed from the field, and how they support a state of dynamic stability within the field through their flexibility to reinterpretation. Following this examination of core ideas, in Chapter VI I will examine in more detail what actors do to maintain core ideas over time, leading to a process model of core idea

maintenance through discourse. Finally, I will summarize the findings of the study and discuss the implications for theory and future research.

CHAPTER III

RESEARCH DESIGN

As explained in the previous chapter, little research has directly explored how institutions are maintained. Without an understanding of how actors work to maintain institutions, we cannot fully understand change in institutions. In this chapter I describe the approach I use to examine the research question how are institutions, specifically core ideas of a field, maintained over time, if at all? First, I describe my overall approach, including my research design and empirical setting. Next, I explain how I collected and managed my data collection. Finally, I describe my approach to data analysis and how I have addressed any threats to the validity of this analysis.

RESEARCH METHOD

Because maintenance is a relatively unexplored phenomenon (Lawrence & Suddaby, 2006; Scott, 2001), this study takes a qualitative, inductive approach to develop an understanding of the process of maintenance. A process approach requires longitudinal data and an attention to time (Langley, 2007). This study, then, is structured as an embedded case study (Yin, 2003), focusing on several controversies within the field of public libraries over a one hundred thirty year period. I focus specifically on the field's discourse, using structurational discourse analysis to analyze the data (Alvesson & Karreman, 2000; Phillips, Sewell, & Jaynes, 2008). This approach allows me to examine the ways in which actors

approach maintenance within their field and to trace the changes in those behaviors over time.

Embedded Case Design

A case study is an analysis of a representative of a class of phenomena, studied holistically in order to illuminate and explicate the class it represents. Classes can include events, periods, or institutions, among others (Thomas, 2011). A single, exploratory case is appropriate when building theory (Yin, 2003) and has been used in several examinations of institutional change (Maguire & Hardy, 2009; Suddaby & Greenwood, 2005; Zilber, 2002). Case studies are particularly applicable for research focusing on “how” and “why” questions (Yin, 2003), and are typical of process research as they focus on the changes in the context over time (Langley, 1999). Given the process focus of this study, a case study design is appropriate. The identification of sub-units in an embedded case study allows a more detailed level of inquiry by examining multiple levels of analysis (Yin, 2003). In addition, there has been a call to return to rich case studies to better attend “the subjective ways in which actors experience institutions” (Suddaby, 2010: 16).

Discourse Analysis

> To the extent social research is an empirical exercise, most of it seems to be connected to how people use language – sometimes how language uses people – in particular situations (Alvesson & Karreman, 2000: 1126).

Discourses are structured collections of meaningful texts (Parker, 1992), where texts can be written documents, artwork, symbols, or other artifacts (Fairclough, 1995). A discourse cannot be studied directly, but only by examining the texts that constitute it (Fairclough, 1992; Parker, 1992). At its base, discourse analysis sees the world as socially constructed and discourse as both creating and being created by social reality (Kelan, 2008), which is the interplay of the ideologies of individuals and groups (Faircough, 1995). Discourse analysis explores how the socially produced ideas and objects that comprise organizations, institutions, and the social world in general are created and maintained through the relationships among discourse, text, and action (Phillips, Lawrence, & Hardy, 2004). This lens assumes that language is fundamental to the construction of social reality (Phillips & Hardy, 2002) and is interested in how organizations and their broader social environments are created and maintained through discourse (Phillips et al., 2008).

Discourse is appropriate for studying institutional work as both are based on assumptions of a socially constructed world and the effective agency of actors (Heracleous & Barrett, 2001). Researchers have argued that discourse analysis is more appropriate than other methods for studying institutions, as institutions are constituted through language (Berger & Luckman, 1967; Phillips et al., 2004). Structurational discourse analysis, which focuses on the duality of structure as both human agency and the structure that constrains human agency, is particularly appropriate to this project as it agrees with the institutional work lens in seeing actors as knowledgeable agents and argues that communicative

actions are manifestations of structural properties of the field (Heracleous & Barrett, 2001). This form of discourse analysis centers itself on the intersection between structure and meaning, bridging the micro (everyday language use) and the macro (social structure), treating language as a social practice (Phillips et al., 2008). Structurational discourse analysis, because of its movement from individual acts to field-level themes, addresses the concern that discourse analyses focus on content of communicative acts to the exclusion of the overall context (Hardy, Lawrence, & Phillips, 1998). It also places the analysis clearly at the juncture of agency and structure (Fairclough, 2005), and so is more likely to reveal how actors maintain that structure. Discourse analysis allows us to see how language constructs social reality, rather than simply reflecting it (Hardy et al., 2005) and admits the subjective and experiential nature of institutional reality (Green & Li, 2011; Suddaby, 2010).

It could be argued that focusing on the actors within the institution might limit understanding of the phenomena, since events external to the institution may trigger change events. However, it is in the communicative acts of actors within the field that maintenance activities may be expected. Previous studies of institutional change have focused on a single event (Maguire & Hardy, 2009), a single field (Suddaby & Greenwood, 2005), or even used the discourse created by a single organizational actor (Munir, 2005; Munir & Phillips, 2005) and used these limited discourses to effectively illuminate institutional processes.

Discourse analysis focuses the researcher's attention on texts but does not delineate a specific method for analyzing those texts beyond iteratively examining

the texts individually and as a whole within their social context (Heracleous & Barrett, 2001). For the purpose of this study, I have taken a grounded theory-style approach, iterating between coding specific instances of discursive action within individual texts and examining the body of texts both as a whole and in subsets by the periods of the field to examine the temporal patterns within the case. Discourse analysis is particularly suited for this study, as previous researchers have noted that discourse is one key way in which actors can deliberately influence institutions (Phillips et al., 2004; Suddaby & Greenwood, 2005), and have argued that institutional patterns are constructed in discourse (Phillips et al., 2008).

EMPIRICAL SETTING

In this section I introduce the empirical setting for this study, first as the field exists at present, and then with a brief overview of the history of the field. A more extensive history of the field is available in the following chapter.

There were 9,225 public libraries (16,698 including branches) in the United States in 2009, serving 97% of the total population of the country. Most public libraries are small, with nearly 60% serving populations of fewer than 10,000 people, and almost 30% under 3,000. In 2009, the most recent year for which national statistics have been published, 2.41 billion items circulated, or 8.1 items per capita, with 33.8% of circulation attributed to children's materials. The number of Internet-accessible computers in libraries has doubled over the past

ten years. Print collections have shrink while audio, video, and e-book collections have grown. Libraries recorded 1.59 billion visits, or 5.3 per capita (Miller et al., 2011). Both circulation and visits have been steadily increasing since 2000, in spite of the repeated assertion that the Internet should obviate the need for public libraries (Martin, 1998). Most public libraries receive the majority of their funding from local government rather than state or federal sources, with 85.3% connected to local government (the remaining libraries are funded via independent library districts, counties, school districts, intergovernmental agreements, or non-profit organizations).

Although patrons see library staff at reference and checkout desks and sometimes shelving materials, staff are responsible for many other tasks. There are four major functions in public libraries that must be supported to keep a library functioning. Circulation is probably the most familiar, taking care of checking materials in and out, and returning materials to the shelves. Circulation also manages hold requests (patron requests for a particular item) and overdue materials (both sending notices and collecting fines and fees). Reference is also familiar to many people who use libraries as a service focused on providing answers to questions, but reference staff also manage collection development, the process of choosing and purchasing new materials for the collection, as well as programming for adult patrons such as book clubs, film series, community information sessions, and library instruction classes. Youth Services is similar to Reference, but focused on services to children and young adults. Finally, Technical Services are in charge of processing new materials: adding labels,

barcodes or RFID labels, and entering item records into the library catalog so that library users can look up materials and check them out. Technical Services also discards materials, removing labels and catalog records when materials are either worn out or no longer wanted in the collection. Discarded materials are often passed on to Friends of the Library organizations for book sale fundraising.

Smaller public libraries manage all four functions with minimal staff and often no degreed librarians, many relying on regional or state cooperatives for their catalog records and even higher-level reference questions. Large libraries generally have a department for each function and may have departments devoted entirely to collection development, fundraising, outreach services, and publicity.

Most of the "librarians" people interact with at public libraries are not librarians at all. A librarian, by the strictest definition, is a person with a master's degree in Library Science or Information Science, or both. Only 33% of library staff are classified as librarians, and only two-thirds of librarians have library degrees. Fifty-two percent of all libraries have no degreed librarians at all (Henderson et al., 2009), meaning that most of the people one interacts with in a public library are staff, not librarians. Librarians in public libraries usually hold positions as library directors, department heads, and, in larger libraries, as reference librarians or catalogers. This is in contrast to larger academic libraries where degreed librarians usually handle most of the reference and cataloging functions. It is entirely possible, even in moderate-sized libraries, to be a regular user of the library without ever interacting with a degreed librarian. Many jobs,

like reference and cataloging, were previously done by librarians, but as the requirement for the two-year masters' degree has become more widespread, librarians have moved more toward administrative positions where their theoretical knowledge of library functions is necessary, and away from positions requiring mainly technical knowledge of library functions.

The qualifications for the title of librarian varies: most states have a schedule of position titles based on the individual's position in a given library and the population served by that library. For example, in Michigan, a library director only needs a library degree if the library serves a population of over 12,000 and is open a minimum of 40 hours per week. If the library does not meet these criteria, the Head Librarian need only have a bachelor's degree in some subject (Library of Michigan, 2010).

Although libraries strive to be a resource for information, limitations of both space and funding make it impossible to collect every title. However, because of the development of state and regional library cooperatives, most libraries have access to the collections of other cooperative members, giving their patrons access to far more than their local collection. As for local collection development, one or the other of two philosophies generally guide a given library: 1) buy what patrons ask for and discard any materials not regularly used, or 2) purchase the best quality materials and discard only those that are either outdated or worn. The latter was more common for many years, with a regularly cited statistic being that ten percent of the collection provided ninety percent of the circulation. The former has become more popular in recent decades as

circulation numbers became the key statistic of library use; multiple copies of popular books and movies drive higher circulation statistics. Circulation statistics are used to justify both local and state funding for many libraries, with a drop in usage meaning a drop in funding.

Public Libraries in the United States, 1876-2006

The full history of the library field will be covered in the next chapter, but a brief introduction is included here to explain how the discourse data were structured around the case.

Although public libraries existed in the United States as early as the 1700s, the field of public libraries really coalesced in the 1870s. States had begun to authorize tax-funded libraries in the 1850s, but the movement toward public libraries solidified in 1876 when three events occurred: *The Library Journal*, the first professional journal for librarians, began publication; the American Library Association (ALA) was founded and held it's first annual conference; and the United States government published its first statistical study on libraries in the country (Ditzion, 1947; Martin, 1998). These three events legitimized the field and gave it a central focus from which to grow.

In examining the history of libraries, it became apparent to me that there were four distinct periods[2] (see Table 1, below). Each period is distinguished by a particular focus of action, such as the consolidation or expansion of the field. Periods are also bracketed by decades in which developments likely to provoke

[2] See p. 36 for details on the development of these periods.

maintenance activity were not prominent. First is the Formation period (1870s-1910s) in which the field built its basic practices and ideals (Ditzion, 1947; Martin, 1998). Discourse during this period focused on appropriate ways to preserve materials, types of materials to be collected, and what the role of librarians should be (Garrison, 1979; Jackson, 1974). Librarians pushed for professional standards for librarianship, founded schools to train librarians (Lorenzen, 2001), and laid the groundwork for the theoretical basis of their work (Ditzion, 1947; Garrison, 1979; Martin, 1998).

Table 1: Periods in public library history

	Decades	**Controversies**	**# Articles**
Formation	1870s-1910s	• Inclusion of fiction in libraries • How to provide the most access to the most people while protecting a library's assets • How to educate librarians	1317
Expansion	1910s-1940s	• How much libraries should be social service organizations • Whether libraries should support intellectual freedom • What sort of additional services libraries could and should provide as their minimum services	674[3]
Consolidation	1940s-1970s	• Educating the public on democracy to fight communism • The push for federal funding for local libraries • How to ensure the values of the field would be maintained into the future	1832
Expansion/ Retrenchment	1970s-present	• Stress between books and bytes as a focus for the field • Drop in library funding • Librarians' role as information professionals	2974

[3] The Expansion period shows smaller numbers of articles in part due to paper rationing during wartime when both journals were in limited publication.

Second came a period of Expansion (1910s-1940s), in which the field, having sorted out its core practices and established itself as a field, pushed to expand its boundaries. It was also in this period that the ALA changed from being a central clearinghouse of information to being an action organization, leading the field in national and even international projects (Dickson, 1986). These projects included the War Service, which created libraries in the army camps of World War I; the foundation of the American Library in Paris to provide library science education to Europeans (Dickson, 1986); and the Enlarged Program of the ALA, which was intended to extend library service to all Americans and focused particularly on under-served rural areas (Young, 1980).

The third period (1940s-1970s) centered around efforts to Consolidate the gains of the past and ensure the future of the field. Responding to the concerns over the spread of communism, librarians developed the Great Books program to educate adults about the roots and meaning of American democracy (Bobinski, 2007). The Chicago School, funded by the Carnegie Corporation, pushed for new standards for library education (Martin, 1998). ALA fought for, and finally won, federal funding for libraries in the passage of the Library Service and Community Act (LSCA). Discourse focused on how libraries made democracy possible and how to ensure continued support for the field.

The fourth and current period (1970s-present) has been a difficult one for libraries. The advent of online and information technologies have directly affected the way librarians do their work and has even threatened the existence of the field (Bobinski, 2007). Many have questioned the need for public libraries in

an age when books, music, and movies are available on the Internet and answers are one Google search away (Martin, 1998). Librarians' discourse has addressed these concerns, developing a possible solutions ranging from a return to previous values and practices to the embrace of the new technology as the beginning of a new chance for the field to expand – and perhaps to finally win the status of true professionals.

DATA SOURCES

The data for this study were collected between September 2009 and December 2010. The sources for the historical case and the discourse analysis are enumerated below.

Case

The data for the historical case have been drawn from a number of library history texts, both journal articles and books (see Appendix for a complete list). My initial survey of materials was supplemented by suggestions from scholars of library history[4] who also checked my presentation for accuracy and affirmed my identification of major controversies related to the field's institutions. This case was further supplemented by additional information from the data gathered for the discourse analysis.

[4] Dr. Christine Pawley, University of Wisconsin-Madison; Dr. James Carmichael and Dr. Lee Shiflett, University of North Carolina at Greensboro; Dr. Mary Niles Maack, University of California at Los Angeles; Bernadette Lear, Librarian, University of Pennsylvania at Harrisburg

Discourse Analysis

The discourse data is drawn from issues of *American Libraries*, the main publication of the American Library Association (ALA)[5] and *The Library Journal*, the most widely read journal in the library field. For over a century, these publications have been central to American library issues, and the center of professional discourse among librarians. Professional associations are critical in the development of social institutions like libraries (DiMaggio & Powell, 1991; Scott, 2008b) so discourse centering on the ALA is likely to be rich with institutional actions. As the heart of both the profession and the field, many of those who are motivated to change or maintain the institution would use this platform, and indeed, contributors include ALA officials, editors, library directors, front-line librarians, deans and faculty of library schools, and library technical staff, as well as field outsiders. Additionally, many in the field read these publications, thus influencing the local discourses in individual libraries.

From these publications, I collected articles, conference transcripts and reports, editorials, letters to the editor, letters from the ALA Presidents, and tables of contents. The tables of contents were used to both track the patterns of discourse over time and to ascertain which articles were related to the chosen developments. Articles were collected only if they focused on the chosen develpoments. Letters, editorials, and conference transcripts and reports were

[5] From 1876, *Library Journal,* published by Bowker, was the official publication of ALA. In 1907, the association began publishing *The ALA Bulletin*, and in 1970 changed the title and format to create *American Libraries*.

collected from every issue during a period when controversial developments were being discussed.

Developments

I focused my data collection around specific developments likely to have invoked maintenance behavior in actors. These developments are periods in library history where social or technological changes challenged the taken-for-granted ideas of the field of public libraries. These developments have been chosen to meet several criteria. First, developments have been chosen to fully utilize the longitudinal breadth of the case (See Table 2). Second, an attempt has been made to choose developments that exemplify typical, negative, and exceptional responses to institutional change to develop the emerging concepts around institutional maintenance more completely (Miles & Huberman, 1994). Third, the focus on specific change developments allows temporal bracketing to better examine the feedback and mutual shaping of institutional responses (Langley, 1999).

These developments trace major debates and prominent issues within the field. First, librarians have long struggled to balance the educational and entertainment functions of the public library. The field was founded and is generally funded on the basis of its educational function, but maintains its support in the community of users in part through provision of materials used primarily for entertainment, such as fiction, music recordings, and films. Second, the field has often seen turmoil over the development and adoption of new

Table 2: Sample of developments in the public library field

Period	Decade	Developments
Formation	1870	Concerns over fiction in libraries
	1880	Push for open shelves, increased hours of operation Push for partnerships with public schools
	1890	Concerns over fiction debated again Development of public libraries for continuing education
	1900	
Expansion	1910	
	1920	Development of reference and readers' advisory services Participation of public libraries in the adult education movement Concerns over audio collections and microfilm
	1930	
Consolidation	1940	
	1950	Reinvestment of public libraries in adult education, focus on democracy Questioning entertainment as a reason for libraries Introduction of discussion groups
	1960	
Expansion/ Retrenchment	1970	
	1980	Debate over whether collections should be guided by popular demand or quality of materials Stress over reduced funding, needed justification for tax funding Development of the Internet Video and audio collection concerns Automation of libraries
	1990	Concern over competition from bookstores Development of the world wide web and search engines Learning how to deal with electronic resources Fear of demise of print/books
	2000	Adoption of information technologies

information technologies. From microfilm in the 1920s to Internet search engines in the 1990s, these technologies are repeatedly proposed as replacements for the public library. Third, librarians have worked to develop the library's role as a center of continuing education, which has led to concerns about community partnerships with other educational institutions, they proper methods of providing education to the public (individual vs. group), and the topics on which to provide education (literacy, literature, information technology).

Data collection focused around specific developments in order to highlight maintenance activities associated with challenges to the core ideas of the field. In many of these developments, the practices of the public library field do change - fiction is accepted into libraries, group instruction is adopted, new formats are accepted - but the core ideas are maintained.

DATA COLLECTION

Data were collected from both print and electronic sources, for both *American Libraries* and *The Library Journal*. The table of contents was first scanned for articles pertaining to the identified developments. Articles from the issue were then either scanned from print volumes or microfilm printouts, or downloaded from EBSCO's Academic Source Premier. Texts were processed with optical character recognition software and entered into an Atlas.ti database for initial coding. Because of the amount of data, data were divided into four databases, one for each of the field's periods. Texts included tables of contents, feature articles, editorials, letters to the editor, communications from the ALA President, and conference transcripts (See Table 3, below). These disparate types of texts, including both the discourse of leaders and more average members of the field, paired with the published histories of the field combined to create a richly detailed view of the evolution and changes within the field.

Table 3: List of text types within the discourse

Types of texts	#	Sources
Editorials	974	Library Journal 1876-2006
Letters to the editor	681	ALA Bulletin 1907-1969
Communications from ALA President	177	American Libraries 1970-2006
Tables of contents	3,360	
Feature articles	4,783	
Conference reports	182	
Total:	**10,157**	

DATA ANALYSIS

Structurational discourse analysis is a grounded theory-style approach to analysis. Rather than iterating between data collection and theory development as in strict grounded theory analysis (Corbin & Strauss, 2008; Glaser & Strauss, 1967), discourse analysis iterated between the theory and the body of the discourse. As analysis of the data proceeds, the researcher's understanding of the theory evolves, and each iteration of that evolution is tested against new data as it is examined. This iteration between data and theory and back again leads to a continued re-conceptualization of the theory until all nuances of the data are accounted for (Isabella, 1990).

In pursuing this approach, my first round of coding was done close to the texts, and as new categories emerged from coding, I revisited earlier texts to ascertain whether those categories were also present but invisible until sufficient repetition had made them salient. I also returned to the tables of contents of earlier years to determine if further articles should be added to the database and collected those that applied to newly-recognized developments. I kept notes on

each year's major developments, and tracked the rise and fall of specific conversations within the discourse.

Historical Overview

The first step in this study was developing an understanding of the history of the field. Rather than beginning with the discourse, I read and took extensive notes on library history texts, specifically those focused on American public libraries. I searched WorldCat for "public library history" to create an initial set of texts to read, discarding those results that were narrowly focused on a specific development or aspect of the field. As WorldCat covers the holdings of most academic libraries in the United States, this gave me an idea of the available texts. I read the available texts, supplementing them with additional texts in the form of peer-reviewed journal articles on specific developments in library history that my initial reading suggested might be important to the field.

After reading and taking notes on these texts, I wrote a brief overview of public library history, including major events, controversies, and turning points in the field (see Chapter IV). I contacted a number of library historians[6] who kindly reviewed both the case and my references. They suggested additional sources of library history and critiqued the case for completeness and correctness. I reviewed the additional resources and edited the case based on these and the historians' comments.

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[6] Dr. Christine Pawley, University of Wisconsin-Madison; Dr. James Carmichael and Dr. Lee Shiflett, University of North Carolina at Greensboro; Dr. Mary Niles Maack, University of California at Los Angeles; Bernadette Lear, Librarian, University of Pennsylvania at Harrisburg

In reviewing the complete case, it became apparent that there were key breakpoints in the narrative (Langley, 1999), dividing the history of the field into four distinct periods, as described in the context section above (pp. 29-32). As I discussed the history of the field and the apparent periods with colleagues, it became apparent that these periods closely matched the periods generally seen in an industry lifecycle (Anderson & Zeithaml, 1984). This parallel supported my intuition that these breakpoints were important turning points in the field.

I next developed a timeline based on these periods, noting key developments likely to invoke maintenance behavior in each period. I used this map of key developments, spread across all four periods, as the focus of my collections within the discourse.

Discourse Analysis

My second step was to conduct a qualitative analysis of the discourse to systematically code the texts. I read and coded each article line by line as well as identifying topics for each article as a whole. Initially, I coded close to the text, generating detailed codes that reflected points of view around key controversies, central concepts of the field, and actors' actions in relation to the sampled developments. For example, one passage from an 1876 *Library Journal* article reads:

> A librarian should be much more than a keeper of books; he should be an educator. It is this that I had in mind yesterday when I spoke of the personal influence of a librarian to restrain young persons from too much novel-reading.

I coded this to indicate that the speaker was promoting the ideas that librarians are educators, librarians should guide the tastes of readers, and that the speaker was denigrating the idea of reading novels.

I began coding with the understanding that the library field had two ideas that were central to their work: Education and Democracy. These ideas were repeatedly mentioned in the texts on library history as the motivating ideals of the field and were promoted as the central purpose of the field's work. The first round of coding pointed out that this was incorrect. As I worked through the discourse, I began to see additional ideas that, like Education and Democracy, were used by speakers throughout the field to explain what their field was about and who they were as a profession. Most of these ideas emerged during the formation of the field and were used through the following periods to justify a variety of practices and differing formulations of identity. Education was as central as the history texts had portrayed it, but Democracy was no more central through most of the discourse than several other ideas, such as Access or Culture. Democracy's apparent centrality was likely due to the fact that many of the authors of the history texts were educated or wrote during the Consolidation period, when Democracy was more central than in other periods.

Initially, I considered these ideas institutional logics, but examination of that literature showed that they were not. An institutional logic is "a set of material practices and symbolic constructions that constitute organizing principles for broader suprarational orders" (Lok, 2010: 1307, following Friedland and Alford, 1991). The ideas I was identifying were not associated with

a particular set of material practices and symbolic constructions, but were used instead to justify a variety of sets of practices, sometimes directly opposing sets of practices. They were clearly not logics, then, but appeared instead to be the ideas that underlay logics. This connection is further explored in the findings section.

These ideas were enduring and central, which led me next to consider whether they might constitute the identity of the field. Identity is defined as central, enduring, and distinctive attributes (Albert & Whetten, 1985; Whetten, 2006). Though these ideas are central to the field and do endure, they do not distinguish one field from another, but are used instead as guides for identity and practice. Libraries and public schools both share a number of core ideas (education, democracy, culture, information) but their identities are clearly distinct.

These ideas, reoccurring at the core of the discourse, are neither identity nor logics, but a construct that underlies both. I developed a definition of *core ideas*, then, as those institutionalized concepts at the heart of a field that act as the touchstones of the field's work and identity. As with any institution, core ideas can be created, maintained, or destroyed. Core ideas are distinct from both identity and logics, and underlie both. I elaborate these connections and differences when I describe findings and implications.

With this in mind, I coded the quotes from the first round a second time, this round focusing on the core idea(s) used as justification by the speaker (e.g., education, access) and the particular type of action they were taking (e.g., promoting change, showing technical expertise) in order to delineate both the

prominence of core ideas and to highlight the actions actors were taking in each period. I worked iteratively between my timeline of developments, coded segments of text, and evolving conceptualizations to track the patterns of discursive action and prevalence of core ideas. The cross-referencing of specific acts within the discourse with the larger context of the field's history allowed the examination of how larger patterns within the overall field interacted with the prominence of both discursive patterns and core ideas.

After completing the second round of coding, I examined the patterns of prominence of both core ideas and the discursive actions actors took. Beyond simple changes in prominence, it became apparent that although most core ideas were adopted by the field during the formation period and continued throughout the field's history, rising and falling in prominence in response to the challenges the field faced in a given period, not all core ideas followed this pattern. One idea, Preservation, though a core idea at the formation of the field, faded when social and technological changes undermined the practices it supported. Another, Information, was only a peripheral idea in the early field, gradually working its way into the core with the rise of computers and information technology. The success and failure of core ideas are explored in greater detail in chapter V.

In examining the discursive actions, I considered the properties and dimensions that emerged across the action codes, and distilled these first (Corbin & Strauss, 2008). For example, the passage given as an example at the beginning of this section was re-coded with Justification: Education, and Action: Defining roles. The action Defining roles became part of the larger discursive action,

Defining identity. The transformation of first-order into second-order codes is shown in Table 4, below, with definitions for the second order codes. How these discursive actions are used across different periods is explored in more detail in the next chapter.

Developing the Model

The third phase of my analysis focused on developing a process model of maintenance. I sought to understand how the actions actors took within the discourse could be used to maintain the core ideas of the field, and how this interacted with the changes in practice that had occurred over time.

I re-read all my notes on the discourse, reminding myself of the patterns within each period, and checked those against the patterns of discursive action that had emerged from the coding and drew charts of the interactions between actions, periods, and core ideas. This led to the development of an initial, simplistic model of relationship between practice, discursive actions, and core ideas. I shared this model with academic colleagues, checking my understanding of the model by explaining it and answering their questions. These conversations led to several revisions of the model, finally culminating in the model described in the next chapter.

Table 4: Evolution of first order to second order discursive actions

First order	Second order	Definition
Justifying expansion Delineating boundaries	Bounding the field	Delimits the edges of the field
Protecting the future Justifying funding Defending existence	Defending the field	Defends the field against perceived threats, arguing how and why the field should be supported
Defining roles Comparing to others Borrowing retail model Borrowing management language	Defining identity	Clarifies the appropriate roles for the field and its members, often through comparisons to other similar (or desired) fields
Denigrating past Denying reading	Demonizing past	Argues that past practices or beliefs were flawed and create to failures
Calling to action Dismissing threats	Energizing the field	Incites field members to action, citing either threats or opportunities
Proposing the future Visioning	Envisioning future	Imagines possible positive futures for the field
Noting recognition Noting validation	Noting approval	Calls attention to discourse outside the field approving of the focal field
Answering responsibilities Answering needs Noting unserved needs Answering wants	Noting need for field	Calls attention to the needs of the field's publics either met or unmet that the field should be meeting
Recognizing change Reality checking	Noting reality	Identifies what is happening within and around the field
Identifying enemies Naming failures Recognizing threats	Recognizing threats	Identifies threats within or around the field, including failures by the field to live up to expectations
Resisting information technology Resisting change	Resisting change	Supports resistance to proposed changes in the field
Building public awareness Pushing for recognition Attracting users Promoting partnerships	Seeking attention	Asks outsiders for acknowledgement through partnerships or publicity activities
Embracing technology Noting progress Promoting change Showing technology expertise	Valorizing change	Glorifies past or proposed changes in the field, sometimes by showing personal engagement with and success through adoption
Valorizing founders Claiming historical values Claiming continuation of past Drawing on past Telling their story	Connecting with past	Connects current or proposed practices or ideals with those that were successful in the history of the field
Defending values Defending freedom Calling for values Promoting balance Valorizing reading	Valorizing values	Glorifies the values of the field, often arguing they are necessary for continues success
Defending image Claiming profession	Defending identity	Supports the current identity of the field against perceived attacks

Issues of Validity

The reliance on a single case is the primary threat to validity with this research design. Although researchers have debated the use of single versus multiple case studies for theory building, compelling arguments have been made for each (Dyer & Wilkins, 1991, Eisenhardt, 1989; Siggelkow, 2007). Although single case research requires care in claiming generalizability, it has long been not only accepted but valued in the social sciences for its ability to develop an in-depth understanding of phenomena that have not been widely examined (Barratt, Choi, & Li, 2o11; Yin, 2003). A single case is ideal for extending and building theory, but must be revelatory to be justified (Siggelkow, 2007). The public library field is revelatory, in that librarians have left a trail of articles describing how and why they do what they do since the formation of the field.

One of the most puzzling discussions in our literature is that of validity in qualitative research. Arguments have been made that the concept itself does not apply in an interpretivist or constructivist paradigm, yet we must have some way of arguing that our research has meaning beyond being a just-so story. I have enhanced the validity of this study through triangulation (Miles & Huberman, 1994). First, by collecting the discourse from both *American Libraries* and *Library Journal*, which after 1907 is independent of the ALA, I have been able to look at two sometimes strongly opposed points of view of the field. *Library Journal* editors have often been critical of the actions of ALA governing bodies, while *American Libraries*, as the organization's official publication, generally supports the decisions of ALA. The two journals also often differ in emphasis,

with *Library Journal* often focused more on librarians-as-workers and *American Libraries* focused more on libraries-as-a-field. Second, by constantly comparing the version of events as portrayed in these journals with the published histories of the field, I have been able to compare both a retrospective and in-context view of major events. Third, by collecting a variety of types of texts within the discourse I have been able to access the points of view of a variety of speakers.

The setting of this study is well-suited to study maintenance, having a long, well-documented history. In addition, the discourse analysis approach is consistent with my data, the question, and previous research in this area.

CHAPTER IV

PUBLIC LIBRARY HISTORY

PRE-FORMATION

Although libraries have been with us since ancient times, the public library is a modern institution, if we define modern as post-Enlightenment. The first public libraries appeared during the Enlightenment, with the earliest recorded public library in the United States arising from John Oxenbridge's gift of his personal library to the city of Boston in 1672. The collection was stored in Boston City Hall where it was available to the citizens of Boston until the building burned down in 1747, destroying the collection (Winsor, 1879).

Early public libraries took a variety of forms. Reverend Thomas Bray of New England started the parish library movement in the early 1700s, encouraging parishes to create lending libraries of not only religious texts, but also classics and literature for the education of their members. Unfortunately, the movement died out after his death in 1730 (Martin, 1998). In 1731, Benjamin Franklin convinced his debating society, the Junto, that they could better educate themselves if they pooled both their books and their money to create a shared library. Founding members bought shares in the library and eventually made money from subscriptions paid by others to use the collection, creating the first subscription library (D'Angelo, 2006; Dickson, 1986; Fletcher, 1927). Subscription libraries were started in many east coast cities, with membership

eventually becoming a sign of social status (Martin, 1998). The 1820s saw the development of circulating libraries, similar to subscription libraries, but readers essentially rented books rather than paying a membership in the library. One of these circulating libraries, the Erie Canal Book Boat, traveled up and down the Erie Canal, allowing readers to keep a book only as long as the boat was in dock (Martin, 1998). These circulating libraries were funded by publishers and, unlike parish and subscription libraries, focused on recreational reading rather than education (Zotti, 2006).

All of these precursors lacked certain characteristics we take for granted in public libraries today, perhaps most importantly the one that makes them public libraries: tax support by the community to which they belong (Jackson, 1974; Martin, 1998). The first tax-supported, and so truly public, library was founded in 1833 in Petersborough, New Hampshire (Ditzion, 1947; Fletcher, 1927). A few years later in 1848, Boston passed a law allowing taxes to be collected to support a public library. Not to be outdone, New Hampshire passed a law allowing tax support for libraries the following year (Ditzion, 1947). Similar laws followed throughout the country over the next few decades.

FORMATION

The rise of public libraries paralleled the rise of the library profession. The public library movement was beginning to come together in the mid 1800s, and in 1853 the first convention of librarians was held in New York City. Many of the

attendees were not librarians, and included publishers, authors, educators, and clergy. Not surprisingly since the field was still small and unstructured, few of the many resolutions made moved forward in practice (Ditzion, 1947; Garrison, 1979; Jackson, 1974). By 1876, there were nearly 3000 public libraries in the United States. Both the public library movement and the library profession had matured significantly in the twenty years since the first conference and the second, organized by a young librarian named Melvil Dewey, was a watershed for both. Over 200 librarians met at the Philadelphia World Fair and saw the founding of the American Library Association, the national professional association that still represents the majority of librarians, as well as the publication of the U. S. Office of Education's first report on public libraries, and the first journal for librarians, Library Journal (Garrison, 1979).

Attendees discussed longstanding conflicts, such as the division over the value of fiction in public libraries. While the Office of Education's report showed that 70-80% of all reading was fiction, there was concern that this did not match the educational goals of the public library movement (Jackson, 1974). While fiction was eventually accepted as part of the library collection, the tension between the recreational and educational goals of the public library have never been fully resolved (Garrison, 1979; Martin, 1998).

A second issue of contention was the need to develop the science of librarianship. The keynote speech warned that, beyond the simple concern that a profession needed a clear understanding of what it did, librarians would be buried under the rapidly increasing numbers of published books unless the

science of collection development were advanced (Ditzion, 1947). It was no longer enough to be a literate person; there must be reason behind what a librarian did. Over the next twenty years, Dewey took the lead in this work, developing standardized cataloging rules, organizational schemes such as the Dewey Decimal system, and the idea of standardized training for librarians (Garrison, 1979).

In 1886, Andrew Carnegie donated money for public libraries buildings in the Pennsylvania towns that were home to his factories. Although there were a few communities that turned down this “blood money” at the urging of labor organizers (Ditzion ,1947; Garrison, 1979; Jackson, 1974; Martin, 1993), Carnegie expanded the program to the rest of the country, and by 1919 had funded the building of 1679 library buildings in 1412 communities, including 52 branches for the New York Public Library (Dickson, 1986). Most libraries were built in the East and Midwest, with Rhode Island the only state to receive no Carnegie library funds (Bobinski, 2007). Carnegie libraries came with strings: Carnegie only paid for the building, not the books, requiring that communities commit to a library tax to provide books and staff. Small communities sometimes found the suggested tax rate was barely enough to buy books and completely insufficient for staff, leaving them with grand buildings that went unused until the community’s tax base grew large enough to support library services (Martin, 1998).

The 1890s saw the growth of reference and children’s services. Most schools had no library of their own, so public libraries became a partner of the local school, with librarians working with teachers to encourage extracurricular reading. Librarians also encouraged children to use the library by providing story

times and after school activities where children could learn skills like embroidery and knot-tying (Martin, 1998; Pungitore, 1995). Reference services were also driven in part by a relationship with schools: demand for reference rose as high schools became more common and students needed more in-depth information on various subjects (Jackson, 1974). By the end of the decade, librarians were complaining that schools were relying on them too much, and the public complained that reading rooms were overrun with children (Fenwick, 1976).

The 1890s also saw the first push for library systems, this time for county systems (Dickson, 1986; Jackson, 1974; Martin, 1998). The idea was that while some communities were too small to support library services on their own, as evidenced by the failure of some Carnegie agreements, even a rural county could gather enough funds to provide a county library (Martin, 1998). These county systems developed the first bookmobiles – horse drawn carts – to take collections around to citizens of the county (Dickson, 1986).

By 1892 there were more women than men in ALA (Bobinski, 2007). In 1904, ALA did a study showing that while women greatly outnumbered men in the field, all larger public libraries had male chief librarians (Holley, 1976). The issue went no farther than a report at the annual conference at that point, but later decades saw the issue rise again.

EXPANSION

The 1901 ALA conference saw speeches calling for both an ethical standard for librarians and for the duty of librarians to guard free thought and be impartial in collection development (Garrison, 1979). In spite of this early interest in impartiality, librarians and the ALA were heavily involved in propaganda during World War I, removing, and in some cases burning, books written by German authors or suggesting that peace was preferable over war. ALA also put together a campaign to raise funds to buy books for army camp libraries. They put together thirty-six camp libraries and delivered over ten million books – all of which they carefully censored to keep up the spirits of the troops (Dickson, 1986). The Librarian of Congress initially barred female librarians from working in army camp libraries, but when they protested this unfair treatment, he relented (Garrison, 1979).

Shortly after the war, ALA began what it called its Enlarged Program, intended to revitalize library services and bring librarianship to the level of other professions. Among the programs included in the Enlarged Program was a new push toward social outreach, including programs for adult education and immigrant services. (Young, 1980) Although some librarians were excited by this new, more social orientation for librarianship, many felt that these social services were outside the boundaries of library work. The program was dropped in 1920 (Jackson, 1974).

The Carnegie Corporation in 1918 commissioned a study to determine the state of library education (Davis, 1976). Dewey had started the first library school at Columbia in 1887 (Lorenzen, 2001), later moving it to the State Library at Albany because Columbia protested against the number of women in his classes (Garrison, 1979). Since then over a dozen other schools had opened, many associated with universities. The Carnegie study results were reported in 1920 and found current schooling lacking, with many programs screening applicants not on skill or past training but on personality traits considered appropriate for library work (Garrison, 1979; Holley, 1976). The report recommended that library programs be at the master's level with the requirement of a previously completed bachelor's degree. It also pointed out a need for a PhD program to better develop library science (Martin, 1998). This report spurred ALA in 1924 to create the Board of Education for Librarianship, which was to create a set of standards for library education (Jackson, 1974). The Carnegie Corporation responded to the report with their Ten Year Program in Library Service, including creating a PhD program at the University of Chicago (Davis, 1976). In 1931, they provided start-up funds for *Library Quarterly*, intended to foster scientific research into library issues rather than simple sharing of best practices as was done in *Library Journal* (Martin, 1998).

By 1930 there were nearly 30,000 librarians (Martin, 1998), but that number would drop over the next decade as the Depression devastated library budgets and states passed laws making it illegal for married women to hold jobs (Garrison, 1979). Many libraries were able to continue building their collections

only because of the low cost of the newly available paperback format. Libraries were used more than ever, with patrons focusing on do-it-yourself books over fiction in this period (Martin, 1998), and were called the breadlines of the spirit for their ability to both educate and entertain even those who were financially devastated. The WPA and other New Deal programs created 27,000 library jobs, and included a push to integrate library services, creating library service for Blacks in the South for the first time (Dickson, 1986).

In the midst of the Depression, the "woman question" rose again. Women had left the field during the war when other jobs opened up, and though they were expected to return to libraries when the men returned to their jobs, few did. Unlike other fields women had moved into, libraries were paying barely more than room and board. In 1933, the *Wilson Library Bulletin*, in response to a letter by a British librarian saddened by the prevalence of women and their lack of natural curiosity in American libraries, held an essay contest for librarians to explain whether women in the profession were an evil. Contests of this sort were regularly held and usually won buy women, but oddly enough, this contest's winners were all male and argued that women should not be in libraries, at least not in such numbers. Another discussion appeared in 1938, with women decrying the lack of women in high status positions, and men saying women should not have these positions because then no men would enter the field and "there would be a loss of intelligence in the field" (Garrison, 1979: 230). The issue was not resolved by either discussion.

Though they had been discussing ethics since the first conference in 1876, it was not until 1938 that ALA adopted ethical principles for the profession (Holley, 1976). Then, in a complete reversal of their World War I position, in 1939 they adopted the Library Bill of Rights, affirming that library collections should be unbiased, representing all points of view regardless of the librarian's preferences or opinions (Martin, 1998). Two contemporary trends drove this stance. First, universities had started to require loyalty oaths from faculty, limiting academic freedom, and younger librarians criticized ALA and senior librarians for giving in to these pressures (Dickson, 1986). At the same time, news reports of fascist book burnings in Europe made protection of unbiased book collections a way of standing up to the march of fascism (Stielow, 2001). ALA highlighted their Bill of Rights as being in opposition to fascism and urged local library boards to adopt the Bill of Rights as library policy. The first test of the policy was a fight to keep *The Grapes of Wrath* on library shelves, since some saw the book as immoral and supporting socialist views (Bobinski ,2007).

ALA and librarians were involved in World War II, again providing camp libraries to soldiers around the world. Libraries at home created War-Information Rooms, a program promoted by Hubert Humphrey, and ALA ran another book drive to get books to soldiers with the help of the American Red Cross and United Service Organizations (Dickson, 1986). The Librarian of Congress, poet Archibald MacLeish, worked with military intelligence to utilize information organization principles from library science to enhance intelligence gathering, and even used librarians in the army camps as intelligence officers to

gather local information (Stielow, 2001). The increased use of information management during the war led to the development of information science as a separate discipline, even though many of their basic ideas were borrowed from library science (Jackson, 1974).

After the war, ALA focused on developing new standards for public libraries, publishing *A National Plan for Public Library Service*, which highlighted the lack of library service in rural areas. The solution offered to this lack of service for 35 million Americans was to create larger library districts (Martin, 1998). This objective of the plan was supported when the federal government passed the Library Services Act in 1956 (de la Pena McCook, 2002), approving funding for rural libraries and bookmobiles. The Plan also outlined a minimum size of population to support various services and suggested two main objectives for public libraries: promoting enlightened citizenship and enriching patrons' personal lives (Bobinski, 2007).

CONSOLIDATION

By 1950, there were over 57,000 librarians, 89% of whom were women. Only during the decade following the war did library positions begin regularly to require a library master's degree[7] (Martin, 1998). Concern that the introduction of television would harm libraries were proved false as many television shows led to increases in reading as viewers came in to read the books made into TV shows

[7] Master's degrees are still not a universal requirement, though they are required in most libraries that serve populations over 5,000 people.

or research historical figures who featured in shows (Bobinski, 2007). At the same time, book banning and burning rose in frequency, with even anti-Communist pamphlets sometimes attacked for not being hard-hitting enough (Dickson, 1986; Garrison, 1979).

The Chicago School, which had been working to advance library science since its inception and had graduated many of the library leaders of the forties and fifties (Martin, 1998), released new standards for library education in 1951 (Davis, 1976). The standards again pushed for graduate level schooling rather than undergraduate. The same year saw the publication of the Public Library Inquiry (PLI), funded by the Carnegie Corporation, which had examined the state of public libraries in the country. The PLI found that 92% of librarians were women, that only 58% had college degrees, and only 40% had a library degree. It also found that most Americans did not see the public library as a source of information but entertainment. Only 2% of libraries served populations of 100,000 or more, with 65% serving populations of less than 5,000 (Leigh, 1950). "If one sentence could summarize the study, it would be: 'Most adults use the library not at all, some use it infrequently, and a few use it a great deal'" (Martin, 1998: 106). Because of this, the report suggested libraries should focus on users rather than pushing outreach to nonusers.

Libraries ignored this advice, focusing on outreach through much of the sixties, particularly reaching out to minorities and disadvantaged members of the community (de la Pena McCook, 2002; Markuson, 1976). Funding during the decade was high, driven up by the concern for education and continued federal

funding. Congress renewed the Library Services Act as the Library Services and Construction Act. Where the first act had seen a boom in bookmobiles to provide rural service, the second saw a building boom as libraries across the country had outgrown their Carnegie buildings (Martin, 1998). The new act also helped form regional cooperatives for interlibrary loan services (de la Pena McCook, 2002; Markuson, 1976). High demand for library services led to an increase in library school graduates to fill the new positions (Garrison, 1979; Martin, 1998).

In 1960, at the same time that demand was outstripping the supply of librarians, Marshall McLuhan claimed the book was dead, completely unable to compete with TV (Bobinski, 2007). Articles in library journals expressed concern that books were a dying format, and many suggested they would be gone by the year 2000 with audio video materials, which had begun to be added to collections in the late forties, taking their place (Martin, 1998). ALA's Library-21 exhibit at the Seattle World's Fair attempted to imagine what an electronic information center would be in 2000 (Bobinski, 2007).

Although the Enlarged Program failed in the twenties, the spirit of the sixties would see a reversal of the decision to turn away from social issues in ALA. The 1969 meeting of ALA saw the first meeting of the Social Responsibilities Round Table and a democratic restructuring of the ALA governance system. ALA affirmed a commitment to address social issues that touched on librarianship including intellectual freedom, poverty, and minority rights (Bobinski, 2007; Jackson, 1974).

Expansion/Retrenchment

By 1970, there were nearly 124,000 librarians. Library budgets dropped, partly due to lowered federal funding (Martin, 1998). The federal government saw libraries as a lower priority than the Vietnam War and the Great Society programs President Lyndon Johnson had created. President Nixon also saw libraries as a local concern, like education, and twice tried to cut all library funding from the federal budget. Both times Congress restored the funds (Bobinski, 2007; Dickson, 1986). Library schools that had enlarged their programs to meet the high demand of the sixties found that budget cutbacks meant fewer staff positions, and so fewer positions available to their graduates (Markuson, 1976). The Los Angeles Public Library stopped buying new books all together, while the New York Public Library had to store new books in a warehouse because they had no money for catalogers or shelvers (Dickson, 1986). Some libraries responded to this by developing endowments and library foundations in the eighties (Bobinski, 2007).

At the same time, library collections were diversifying, adding cassettes, audiotapes, toys, tools, musical instruments, and even pets to the collection. Libraries also continued their outreach services by bringing all manner of events into the library, from exercise classes to rock concerts to public film showings. This led to a Wall Street Journal article in 1975 titled “With a Little Luck, You May Even Find Books in the Library” (Dickson, 1986).

To add to the upheaval in the library world, the seventies saw an upswing in feminism, not a small issue in a field nearly 90% female. ALA created a Feminist Task Force in 1970, and the Committee on the Status of Women in Librarianship in 1976. At the 1973 conference, it was again noted that top jobs were still going disproportionately to men. Yet in many articles published in the library literature, women were blamed for the low pay librarians earned. Although the issue was not resolved, all this activity led to the collection of statistics on women's vs. men's pay, and the beginning of an ongoing discussion of women's roles in libraries within ALA (Hildenbrand, 2000).

The first commercial computer was marketed in 1950, but it was not until the seventies that public libraries began to use computers extensively (Jackson, 1974). Academic libraries had used computer databases since the fifties, but the charges per use were so high and the cost of the technology so great that public libraries had not seen enough benefit to invest. But in 1970 the MARC (MAchine Readable Catalog) record standard was completed, making it possible to create machine readable records with the information that had previously been kept on catalog cards (Bobinski, 2007; Markuson, 1976). Larger libraries began automation projects to put their catalog and circulation records into computer databases, allowing them to streamline the staff-intensive circulation process (Markuson, 1976). Library co-ops developed with LSCA money also allowed public libraries to use computers to streamline interlibrary loan functions within their co-ops and pool their funds for database access (Ditzion, 1947; Martin, 1998).

Also in the seventies, the IRS, as part of a nationwide campaign to root out subversives, attempted to access library records of those who had checked out books on explosives and guerilla warfare. Librarians resisted, and ALA released its "Policy on Confidentiality of Library Records," urging libraries to declare their circulation records confidential and therefore only available via court order (Dickson, 1986).

In 1977, ALA's Office for Intellectual Freedom (OIF) tested their new stance on social issues. In an effort to illustrate the complexity of intellectual freedom, OIF created a movie called *The Speaker* documenting one library's struggle to defend the right of a racist to speak at the public library. Advocates of minority rights within ALA felt the OIF had turned on them, and the movie met criticism both inside and outside the organization. ALA stood by the film for its ability to showcase the issue (Bobinski, 2007).

The eighties saw the rise of the CD-ROM database, which changed the way databases were used entirely, making them accessible to patrons directly (Bobinski, 2007). Previous dial-in databases were only accessible by librarians with training in Boolean searching, but CD-ROM databases came with user-friendly interfaces, keyword searching, and even some graphics (Martin, 1998). These databases were made possible by the 1981 introduction of the personal computer. At this point, electronic reference services were seen as an entirely separate service to print references.

Online public access catalogs (OPACs) allowing patrons to access the library's computer catalog directly from terminals inside the library began to be

widely available in public libraries in this decade. Patrons could not only look up a book or subject to see if it were available in the library's collection, but had immediate access to availability information since OPACs were linked to the circulation system. Soon vendors developed fully integrated library systems, linking circulation, cataloging, and purchasing to the OPAC.

The eighties saw a renewed debate around collection development. Some librarians, echoing their 19th century forebears, argued that library collections should focus on serious, high-quality reading material because their purpose was education. Others felt it was more important to supply multiple copies of popular materials, to give people what they wanted, and follow the entertainment model of libraries (Bobinski, 2007). Libraries have generally tended toward the latter position in the last two decades, but the former argument still has many proponents (D'Angelo, 2006; Martin, 1998).

In 1987, another branch of the government decided that public libraries could be a place to gather intelligence on the public. The FBI developed a Library Awareness Program, asking librarians to report suspicious foreigners to them. ALA challenged the FBI's right to use librarians to monitor library users, but the FBI refused to back down. In 1989, ALA used the Freedom of Information Act to acquire documents the FBI had put together on 266 people who had criticized the Library Awareness Program and been subject to FBI index checks (Bobinski, 2007; Starr, 2004). The program faded away, though the FBI never changed their position.

The 90s were the decade of the Internet. A growth in online resources allowed libraries, whose budgets had again been reduced as part of an effort to reduce government spending (Martin, 1998), to decrease spending on physical reference and journal resources and replace them with online full text databases. These online resources replaced the CD-ROMs popular in the eighties. Libraries, many aided by the Gates Foundation's funding, became hubs for Internet access particularly for those who could not afford home access. This began an ongoing concern with equitable access, with libraries pushing for more recognition that they were bridging the digital divide (Bobinski, 2007).

This focus on online resources helped library schools to reexamine their curricula and over the decade saw the development of Information Schools – former library schools that had adopted information science as part of library science, pulling together the two streams that had gone their separate ways in the fifties. The new I-Schools updated the traditional L-School curricula, adding online metadata to cataloging classes, database management to collection development, and online reference to the traditional training in reference interviews. Students also learned to build web pages, develop and program databases, and run local area networks. Many schools retained the traditional curricula, but students of the new programs were in demand as senior librarians recognized their staff lacked the necessary technical skills to manage their new resources (Bobinski, 2007).

The 90s also saw the addition of a number of new multimedia formats including music CDs, audiobooks, and video (Martin, 1998). These materials,

mainly focused on entertainment, quickly became popular with patrons and helped to increase library circulation statistics. Interlibrary loan also grew as union catalogs – catalogs collecting all the holdings of a regional or state cooperative – became widely available to patrons, allowing them to see non-local holdings and request them (Bobinski, 2007).

By 1995, there were 70,000 public libraries, including branches and bookmobile stops. A Gallup poll the same year found that 67% of Americans had used a library in the past year (Martin, 1998).

Congress passed the Communications Decency Act (CDA) in 1996, the first of a series of attempts to protect children from the perceived dangers of the Internet. ALA and the ACLU challenged the CDA on constitutional grounds. They won this case in 1997. Congress immediately passed the Children's Online Protection Act (COPA) which was similarly overturned in 1998 (Bobinski, 2007).

In 1998, Congress passed the Library Services and Technology Act (LSTA). This bill provided funding for technology to provide Internet access in libraries. This, in addition to the Bill and Melinda Gates' Foundation's work starting the previous year, helped many public libraries provide Internet resources for their communities. The LSTA also created the Institute of Museum and Library Services (IMLS) to oversee libraries and museums throughout the country (Martin, 1998).

By 2000, there were over 190,000 librarians according to the U.S. Census, 82% of them female. Statistics gathered by the IMLS showed 75 million reference

questions were answered this year. By 2003 that number had risen to 305 million questions answered (Bobinski, 2007).

Congress passed the Children's Internet Protection Act (CIPA) in 2000. Earlier laws were overturned because they infringed on free speech, so this bill followed the pattern of federal highway funds and simply said that libraries that accepted federal funds for technology were required to use filters on any computers with public Internet access that could be used by children. ALA challenged this law, insisting, as it had in earlier cases, that filters restricted patrons' information access and additionally, did not work as advertised: they both failed to block sites that many would consider objectionable and blocked sites that no one should consider objectionable, particularly sites on medical issues. The Supreme Court found that the law did not infringe on First Amendment rights as earlier bills had, in part because filters could be turned off for adults it they requested it. Libraries were left with the choice of refusing federal funding or filtering their computers (Bobinski, 2007; Starr, 2004).

In 2001, the attack on the World Trade Center led Congress to pass the USA Patriot Act, including Section 215 which allowed federal agents to request libraries' circulation records via a national security letter. Those who received these letters were forbidden to mention the letter to anyone. Librarians were outraged at this apparent attack on the privacy of patron records, well established since the seventies. Several found ways around the secrecy of the letters by posting signs noting that no request had yet been received, or reporting each month to their boards that they had not received such a letter (Starr, 2004).

Finally, in 2005, a letter was served to a library and a library cooperative in Connecticut, both of whom refused to turn over their records. The librarians involved sued the federal government for the right to refuse the letter in *Doe vs. Gonzalez*, and eventually won. Section 215, however, still remains an active part of the renewed Act (Cowan, 2006).

At the same time, libraries were adopting Internet technologies that opened their collections to use by those who never came into the building. Many public libraries began to offer ebooks, music downloads, and database access through their web sites, and some offered free, unrestricted wireless Internet access for those in and around the building. More and more libraries offered computer access, mainly used for Internet services by patrons. The rise of the ebook led to another round of predictions that books were on the way out, and with them libraries, but many librarians saw the rise of information technology as an opportunity rather than a threat. Libraries had worked in search and retrieval of information for over a century – why shouldn't this technological revolution carry them to the heights of professional status?

PATTERNS OF INSTITUTIONAL CONFLICT

A number of trends appear repeatedly through the history of public libraries. The tension between education and entertainment, evident in the different forms of early libraries, has continued for over a century with one or another camp proclaiming victory periodically. The tension between the ALA's

stance on absolute intellectual freedom and the demands of local communities pulls many librarians, particularly in small communities, in different directions. Nearly every new information technology from microfilm to microcomputers has led to a flurry of predictions that libraries were about to be extinct, yet they have repeatedly adapted to these technologies, making them integral to the library experience. The development of information as a national resource, midwifed by librarians, has repeatedly threatened libraries with becoming part of the federal government's work to keep track of its citizens through their reading habits in direct contradiction to librarians' avowed desire to promote intellectual freedom through privacy.

Libraries have changed over time from carefully protected book warehouses to multimedia learning-entertainment centers. At the same time, they have retained some of the key ideas that were endorsed at the first ALA conference in 1876, including the idea that libraries should be centers for continuing education for all, that libraries help to create an educated electorate and thus support democracy, and that librarians have developed special skills to help organize the constantly increasing flow of information.

Having introduced the history of public libraries, I move next to the core ideas of the field. I discuss what core ideas are and which ideas are at the core of the library field. I also examine why some ideas drop out of the core and how new ideas are added, as well as how the reinterpretation of core ideas leads not only to their maintenance over time, but creates a dynamic stability within the field, allowing change in practices without disrupting the core of the field.

CHAPTER V

CORE IDEAS OF THE FIELD

This study set out to determine how—and if—the core ideas or institutions of a field are maintained in the face of social and technological change. In reviewing the history of the library field, it became apparent that some core ideas are maintained over time but others, initially central to the field's understanding of itself, fade over time as the limits of their flexibility are reached and they cease to be adaptable to external and internal changes. In this section, I will first describe the core ideas of the library field and examine how the prominence of these ideas varies over time. Second, I will examine why some ideas remain prominent and central throughout the history of the field in the face of social and technological changes. Third, I will show how a core idea can lose its place in the core if it is insufficiently flexible to be reinterpreted to address changes in society and technology. And finally, I will show how a once-peripheral idea can be brought to the center of the field through a combination of pressures internal and external to the field.

CORE IDEAS IN THE PUBLIC LIBRARY FIELD

At the root of a field are its core ideas, the touchstones of the field's work and identity. In the library field, there are several core ideas, but one that stands out above all the others: *Education*. The rise of the field in the mid-1800s was based in the idea that education would lift the poor out of poverty and that an

educated people would be both wealthy and wise. But education does not stand alone at the heart of the field. *Information*, whether defined as the provision of specific facts or the underlying building blocks of knowledge, has been recognized as a central to libraries' work. Libraries were often seen as bastions of *Democracy*, because only an educated electorate could make wise decisions at the polls. *Culture*, passing on the rich history of art and literature, was inherited from the academic libraries of universities, as was *Preservation* of rare materials. *Access* was an idea distinctly different from the academic libraries. Many academic libraries limited use of their materials to students and faculty, and sometimes only male students or upper classmen. Public libraries were open to everyone, since their mission was to educate the masses. Public libraries have also long admitted that part of their work was to provide *Entertainment* to their public, though some have seen this core idea as standing in opposition to education.

Each of these ideas has contributed to the overall sense of what public libraries are and do. Field members now almost unconsciously call on these ideas to explain their work to outsiders and each other. They use these ideas to argue for the continuation of the field, for changes or continuations in practice, and to explain who they are.

Core Ideas across Time

Although most core ideas endure, their prominence in the discourse rises and falls across different periods in the field's history. Most of these ideas have been central to the field since the beginning and are so taken-for-granted that actors use them unconsciously to explain the field. However, one of these ideas, Preservation, was central only early in the field's history, quickly fading to a peripheral position. A second, Information, was peripheral until a series of technological and social changes in the seventies and eighties brought it front and center. Others have waxed and waned in relation to the environment of the field and the issues the field was addressing, except Education, which has continued as the central pillar of the field, in spite of recent losses in prevalence. Table 5, below, shows the relative percentage of each core idea based on the number of quotations in which actors referenced each.

Table 5: Prevalence of core ideas by period

	Formation	Expansion	Consolidation	Expansion/ Retrenchment
Access	7%	4%	6%	17%
Culture	5%	6%	6%	7%
Democracy	4%	8%	21%	8%
Education	76%	77%	58%	32%
Entertainment	7%	1%	2%	5%
Information	0%	2%	4%	28%
Preservation	3%	0%	0%	1%

Some patterns become apparent from the distribution of core ideas over time. Through most of the field's history, Education has been the most central core idea, casting others into insignificance through the first two periods with more than three-quarters of the discourse relying on this single idea. Even Democracy is only weakly represented until the Consolidation period, in spite of many recent claims by leaders in the field that Democracy has always been a central guide to the field. This may be due to many current leaders' education having taken place at the end of the Consolidation period. What is apparent is that the current period has seen a shakeup among core ideas: Education has dropped below 50% of the discourse for the first time in history, while Access and Information have risen meteorically from their former positions. This is likely a reaction to the stress the field is suffering as they search for a narrative that explains their survival past the introduction of information technology.

In the next section, I will explore how Education, still strong even in its reduced position, exemplifies the necessary flexibility to remain at the heart of the field for over a century.

REINTERPRETATION OF PERSISTENT CORE IDEAS

> The way we operate has been changing as a result of the successive application of technology. The major difference now is the change that affects what we do, not just how we do it. The library is becoming disembodied, disappearing, like the Cheshire Cat, slowly

> but relentlessly. The hype and promise of the paperless society is coming back in a modified form. (1988 P624d[8])

Education remains prominent because it is adaptable. Actors are able to draw on this idea to support many practices and have been able to reinterpret the idea to match both technological and social changes. It is even flexible enough to be used by both sides of an argument within the field on the direction they should take to deal with the most serious threat the field has yet faced.

In the late 1980s, online technologies had already been a part of library work for nearly two decades. However, the promise of the early Internet and the first wave of digitization raised questions for librarians about the feasibility of libraries as both a place and a service. Librarians were caught, as one said, between "two revolutions—one of print, not quite spent, and another of electronics, not quite underway.... This collision will take decades to sort out, but its impact on libraries will be immediate and profound." (1992 P978d) As the Internet blossomed into the World Wide Web and home computing became common, many librarians felt they had to change what they were doing or become irrelevant.

Two groups offered solutions to address these changes. The first suggested an account of practice that claimed libraries were really about books and librarians were book people. This group suggested that libraries would survive by focusing on what they had always done best: encouraging people to read,

[8] Quotes are referred to by their document number (P7, P349) in the Atlas.ti database. Letters (a, b, c, d) denote the database, as the number of documents required splitting the data into multiple files.

collecting books, and cataloging materials. The second group suggested that more change was needed and offered a distinctly different account. They argued libraries should embrace online technologies, collect materials without considering format, and take a leadership role in developing information literacy among their users. What is curious about these opposing views is that both used the same justification for following their proposals: libraries are about education and access to knowledge.

Books

For proponents of books, the book itself embodied the mission of libraries: information in context. Although many acknowledged the advantages of databases and Internet searches for finding discrete facts—sometimes denigrated as trivia—they focused on the idea that facts, or information, without context are not knowledge, not the building blocks of real education. This argument depended on their differentiation of information and knowledge: "While knowledge is orderly and cumulative, information is random and miscellaneous. … In our ironic twentieth-century version of Gresham's law, information tends to drive knowledge out of circulation." (1988 p579d) Books also have the advantage of being validated by the publishing process:

> The essential difference between the Internet and the library is this: The Internet is where any body can talk; the library is where the few people who have something worth remembering talk and the rest of us listen. Both are valuable, but they are different. (1997 P1494d)

In this account of practice, libraries are portrayed as having similar qualities to books: they create context, focus on knowledge over information, and have an editorial process in their collection development policies. Therefore the book and the library are inseparable, and only through books can real education occur.

Because of this equation of books and libraries, many book proponents proposed that the library of the future should and would look much like the library of the present:

> My own private Utopia for the libraries of the 21st Century will include the libraries of America as not linked by any national network, as not obliged to use VDT terminals instead of book stacks, as still maintained by librarians very similar to the librarians of the 1980's-some technology-minded , some management-minded, some user-oriented, some " bookmen," and even some a mixture of all of these. (1981 P137d)

Note that this speaker does not want technology entirely removed from libraries, but prefers technology to be peripheral to library services, and certainly not taking over from the local- and book-focused model then current.

Book proponents supported their ideas by writing articles and developing conference programs featuring both librarians and outsiders willing to support their point of view. A keynote speaker at the 1987 annual conference, Theodore Roszak, seemed to speak for many librarians, and was quoted in several letters to the editor:

> [Roszak] said librarians are “strategically placed" to defend the book, adding that the "best purveyors of information may be those who know information is one of the lesser cultural values. " Between all the facts in the world and one good idea there is a leap of the imagination no computer can match. (1987 P543d)

Roszak called out the idea that information is not important, while education is. At a conference session nearly ten years later, an invited speaker, journalist Richard Rodriguez argued that too much focus on computers would drive books out of the library and warned: "Information is not meaning. Great ideas can come from information, but it is not insight, it is not wisdom." (1996 P1415d) These invited speakers repeat the central argument again and again: information is not meaning, is not knowledge – and therefore is not the path to real education.

These librarians also called out the emotional effect of books and the importance of reading to an education that is both factual and humanitarian:

> Along with a growing interest in the role of books in our culture and a greater understanding of the roles that reading plays in the inner life, comes a renewed appreciation for the librarians' role as intermediary between reader and book.... These ideas may seem quaint or outmoded but they're at the core of our profession. Indeed, the first virtual reality is that unique near-mystical state created when words are read. (1993 P1140d)

Again, they argued that information alone is not enough and called out the professional role of the librarian as intermediary, a role that is as challenged by information technology—known for its ability to disintermediate—as the book is.

Book proponents also pushed back against the allure of technology, both in expecting technology to solve the problems of the field and the inability of the poor to access it. In 1983 Michael Gorman, a longtime proponent of books over bytes, accused librarians of 'technolatry,' saying "The means are so entrancing that we don't think about the larger purposes of the library, which go beyond 'information' and have to do with culture and knowledge and wisdom" (P261d).

This group also expressed a deep concern that technology will limit education for those who do not have the means to own a computer. They were concerned that information technology would not only replace the book, but also destroy libraries as educational institutions. Clifford Stoll, an author on technology, quoted in an article on the future of libraries, supported the idea that information technology is a threat to libraries' core work:

> The best way to gut our libraries…is to ship the books off to distant warehouses, supplant librarians with generic information specialists, and replace bookshelves with gleaming computer workstations. Donate software which will quickly become obsolete. … Count hits on your Web page instead of visitors to the stacks. Pretty soon, traffic to the stacks will evaporate and the library will fossilize… (2000 p1798)

Stoll portrays information technology as a way for libraries to lose support out of neglect, while librarians are blinded by the "gleam" of computers, thus turning away from their core practices – and core ideas.

Throughout this argument, actors relate the core idea of Education to the practices they are proposing or defending. This relationship between accounts of practice and core ideas invigorates the core ideas while justifying the practices.

Bytes

> First, [libraries] are a repository for information; and second, they provide reference services…. No physical structure can grow at the rate information is growing in order to house this new material. Therefore … the library as a physical repository is becoming less important. … As accessibility and deliverability of information is priced accordingly, we will see discrimination based upon "information haves" and " information have-nots." … To address

> this growing problem, some librarians are teaching patrons information-retrieval skills along with reading skills. (1992 P1056d)

At the same time that book proponents were decrying information as unformed knowledge and the Internet as data without context, a second group of librarians were promoting information technology and the Internet as a cure-all for the ills of the field. As early as 1980, information proponents were applauding conference speakers such as Howard Resnikoff of the National Science Foundation, who told them, “In a sense, machines will be your direct competitors. How can you live together? I think perhaps there can be a symbiotic relationship rather than survival of the fittest” (1980 P40d). He also suggested that it was librarians who should take the lead in ensuring that poor children receive training in new technologies, since they would be unlikely to have access to them at home. These two points – partnership with technology and training the public – form the core of the information proponents’ arguments.

Information proponents claimed that data and information, although not knowledge in themselves, are the stepping-stones of knowledge. They argued that librarians’ role in dealing with information is to help their patrons learn how to manage information and transform it into knowledge for themselves:

> Our fantasies envision a world of accessible electronic information and an ever- increasing number of workstations, complete with artificial intelligence systems. Well-trained end users with well-defined information needs will access the world’s information store with little more than a keystroke. (1990 P734d)

This speaker did not take the fantasy as reality, and went on to discuss the many roadblocks to reaching information utopia. Yet it was this vision, of librarian-

trained users gathering what they needed from a free-flowing universe of information, that inspired the information argument.

Where book proponents often portrayed technology as detrimental to librarianship, information proponents looked at technology as a new set of tools to accomplish the same goals:

> Far from wiping out the need for librarians, technological tools can be a means that help us to develop whole new levels of service. ... Our challenge is not just to provide more information, or even just the right answers. Our challenge is to help people formulate the right questions. (1990 P734d)

These librarians do, however, acknowledge that information technologies might mean the end of the book as we know it, but instead of decrying this, they used it to promote change in the way librarians do their work, encouraging a better understanding of information:

> What's in all those books, anyway? Information. How can we organize the information better so that we can transmit it better to our patrons? How can we assess their information needs, respect their information privacy, and store and retrieve information for them if we don't understand the underlying principles of information? The day of the book may very well be ending, and librarians who refuse to see that may find themselves in an evolutionary dead end. (1990 P772d)

Librarians must understand information, rather than relying on books, to ensure they can fulfill their educational goals.

Additionally, this group argued that the access concerns of the book proponents were misleading. Although they recognized that many users did not have computers at home, they promoted the idea of in-library access, that

libraries could provide the computers and the training to use them. Not only does this access provide the information have-nots with educational opportunities, it ensures they can participate effectively in society:

> Librarians are needed more than ever to ensure that the public has the information literacy skills it heeds to live, work, learn, and govern in the digital age. Libraries offer not only access to computers and networks, but also the content, training, and expertise to ensure widespread participation in our information society. (2001 P1949d)

This argument proposed a new role for libraries, rather than revitalization of old roles, as community centers and technology centers rather than places focused on books and reading.

Information proponents, then, like their book-focused opponents, drew on the core idea of education to argue that libraries should reinvent themselves.

> Personally, I take the view of the library as the leading force in society for gathering knowledge and making it universally available, a service that is a prerequisite for a democratic society. Librarians are charged with guiding and shaping that process. They serve as society's guides to knowledge and where to find it. These roles will only become more important with time, so long as we take the broad view of what the concept of library represents. (1992 P995d)

Reinterpretation of Core Ideas

It is not surprising that both groups draw on the idea most central to the field to support their arguments—it is reasonable that they would want to find some way to draw on what is meaningful to their peers. What is interesting, however, is how they reinterpret these core ideas to suit their arguments. Where many accounts of practice simply reinforce core ideas by calling on them, these

arguments clearly reinterpret the meaning of education. Book proponents construct education as requiring structured information in books, accessed through the guidance of book specialists. They suggest that libraries can best serve as educational institutions by their differences from information technology – focusing on completeness of information, context for that information, and the validation of the publishing process. They argue that books are more accessible to users, that information requires technology not easily available to many, and that focusing on materials more available to those with more resources already undermines the democratic ideals of the public library.

Information proponents, on the other hand, argue that the educational goals of the public library are best served by embracing information technology. They define education as helping people to understand technology and to use it effectively to meet information needs. Education may not come neatly packaged with answers in the back of the book, but is a process requiring tools, which librarians are happy to help their users develop. Access to technology at the library is enough because it gives users access to more than they could with only books, and because the Internet is place independent: users in rural South Dakota can have access to the same online information as those in New York City, something not possible within the limitations of print.

Neither of these arguments—constituting new accounts of practice for the field—have won out over the other. This appears to be because both have, so far, effectively tied their arguments into the longstanding core ideas of the field. The reinvention of Education to suit the arguments of each has allowed both groups

to maintain their potential solutions to the challenge of information technology. This reinterpretation of the meaning of core ideas to suit the needs of a given era is an important component of the core ideas' maintenance. Ideas that are flexible enough to be reinterpreted survive the vicissitudes of time in part through this continual reinterpretation. Ideas that are less flexible, such as preservation, cannot be connected with accounts of practice effectively to meet changes, and so fade from the core. Education is maintained throughout the discourse, and it is reinterpreted and used in numerous ways to fit the challenges of each period. In the next section, I will examine one idea that failed this test of flexibility and faded from the core of the field.

FAILURE OF A CORE IDEA

Not all core ideas are maintained. In the early library field, librarians were deeply concerned with preserving books, in part due to the difficulty they had in obtaining them. Mass publishing was still in toddlerhood in the mid-1800s, with paperbacks only introduced in 1845, and the rotary press, which allowed much faster printing than previous technologies, invented in 1846. Books were not readily available, nor easily replaceable. One of the major responsibilities outlined by librarians for their field was the preservation of books, not for the sake of the books themselves, but in order to provide the necessary materials to educate the public.

The idea of preservation was also an inheritance from the wider library field, at that time mainly academic and personal libraries, which had approached librarianship as a form of collecting of rare and precious objects. Many early public librarians had their first library experiences in academic libraries, which not only focused on preserving their books as unique, collectible objects, but also limited access to their collections to the select few. Some academic libraries were so concerned about preserving their collections that they limited access even among their students, allowing only upperclassmen, or only male students, to access their collections.

Accounts of practice from the early Formation period supported practices that gave preference to continued access by future generations over ease of access by current users. Many librarians, protective of their collections, looked on users with deep suspicion. Frederick Poole, one of the founders of the American Library Association (ALA), said at the first conference in 1876, "I think it is not safe to allow any person or class of persons, whatever be their positions or professions, to roam among the bookcases without it being mutually understood that they are closely watched." (P7a) To illustrate the dangers of giving patrons access to materials, he went on to detail how a minister had attempted to steal numerous books from a public library.

Additionally, the idea of librarians removing materials from the collection was disturbing to many early librarians. They believed that a book, once collected, should remain in the collection for all time:

> In fact, there is no book that may not at some time become useful. For which reason I find myself very much out of sympathy with those who are talking of late of the enormous growth of literature and libraries, who profess to fear that the public library will in time occupy the whole site of the city, who talk of weeding out and of holocausts. Books should not be destroyed. (1889 P184a)

Because of this, the early discourse contains a great deal of discussion, and even special issues of journals, focused on buildings and lighting of buildings – heat and smoke from candles or gas lights were damaging to leather bindings, buildings with insufficient circulation led to mildew or brittleness of glue.

This desire for preservation led to a number of practices focused on preserving library materials. Readers were not allowed to browse the collection. Instead, they could look through the library catalog (in the form of printed volumes or card catalogs) and request a title from the librarian. The librarian or their clerk would then fetch the book from the shelves, which were kept behind locked gates. Many patrons found the catalogs hard to use, and print catalogs were often out-of-date, with new editions printed once every five to ten years. Home circulation was not universal; many libraries only allowed books to be read in the library, meaning access was only possible when the library was open. Due to the problems with gaslights, many libraries were only open during the day when there was sufficient light to read.

These limits to access pushed up against another core idea of the fledgling field, the idea that libraries were created to educate the common man. The common man was a worker in a factory and worked six days a week, often from sunrise to sunset. His only free day was Sunday – when libraries were closed.

This led to early criticisms of the field, noting that public libraries, like the museums they were often associated with, were only open when the pubic they were meant to serve could make no use of them:

> Whatever appliances we have for educating the sense of beauty, for the cultivation of the aesthetic feeling, are carefully excluded from the profane eye of the people upon the only day whereon they have the leisure to become acquainted with them. (1878 P49a)

Even early in the field's formation, prominent librarians like Melvil Dewey pushed for a change in the way librarians viewed their work and themselves. In his inaugural editorial in *The Library Journal*, Dewey painted an image of librarians more interested in putting books into the hand of their readers than in protecting the books themselves:

> The time was when a library was very like a museum, and a librarian was a mouser in musty books, and visitors looked with curious eyes at ancient tomes and manuscripts. The time is when a library is a school, and the librarian is in the highest sense a teacher, and the visitor is a reader among the books as a workman among his tools. (1876 P1a)

This conception called for greater access by the public, and less care for the books. It would require trusting readers rather than keeping a gimlet eye on them.

As the turn of the century approached and publishing technology advanced, books became ore available. At the same time, public education was becoming a pressing issue. Most students were leaving school after sixth or eighth grade and going to work, and prevailing social ideals suggested that lack of education was the real reason the poor led lives of desperation. Public libraries

allied themselves with public schools, working to invest school children with a love of reading and encourage those who had left school to better themselves through the same. These social changes pushed up against the practices librarians had developed to preserve their collections: how could they justify themselves as educators if no worker could use the library? if no reader could find a book because the catalog was outdated or inscrutable? Librarians concerned about the effects of limited access began suggesting a change in practice:

> Have you ever tried turning them loose among the shelves? … I would…assert that any undisciplined reader is likely to select a better book from the shelves than he will select from the catalogue. …[I]n the book rooms the fancy is captivated toward a score of books novel to his experience…. (1891 P308)

Librarians began to attempt new ways of working in order to create a more welcoming environment. One access-oriented librarian decided in 1882 that he would try a bold experiment:

> …to throw open the gate which had hitherto barred all access to the books, and to invite the students to come behind the railing, that they might handle the volumes, and by personal examination become familiar with their authorship and contents. (P126a)

This was still seen as a risky prospect, with the ever-present specter of loss and damage to materials making many librarians nervous of similar attempts: “An ideal administration of a library in an ideal community would allow free access to the books; but in a less perfect condition of things it has never been found safe.” (1886 P166a)

Not everyone was so timid. John Cotton Dana, the head librarian at the Denver Public Library, felt that as the library and its collection belonged to the public who had purchased it, they should have access to their materials. By 1890 he had opened the shelves of his library:

> Books are lent, for the most part, on the simple promise of the applicant to observe the library's regulations.... The gate in the fence which separates the cases from the reading tables is sometimes closed, but never locked. Readers who wish to use the reference books, which for want of space elsewhere are kept behind this fence, are asked to step in, and told to enter without asking the next time they may wish to use them. (1891 P306a)

He noted in his report at the annual conference that open shelves had precipitated no greater loss of or damage to materials, and in fact the sense of ownership by the people seemed to have made them more careful to return materials promptly. Other libraries followed Denver's example with similar results, much to the joy of schoolteachers and workers' advocates.

It was not long before the tone of the discourse turned clearly against the preservation mindset. Rather than worrying about loss of materials, librarians were mocking the old mindset:

> It might be called the pre-historic age of libraries. The average librarian then was usually a keeper of books - that is, one who did not allow them to get away, and kept as many persons as possible from using them. He was commonly a college professor who could not teach, a minister who could not preach, or a physician who had no patients. (1891 P306a)

This speaker at the annual conference echoes Dewey's sentiment of fifteen years before, but unlike Dewey, finds many in the field agree with him. Again in 1892,

an article in *The Library Journal* denigrates the librarian who would be merely a keeper of books:

> She may indeed be a mere custodian of books, a sort of animated machine who does one kind of work well, but she will not be a power in her community, as every librarian, teacher as she is in the people's university, should strive to be. (1892 p352a)

This is not merely a push against the preservation mindset, but a claim of greater scope for the field: librarian's are not book-stewards, but teachers, educators, bound to advance the education of their community. The push toward the role of teacher rather than custodian continued to drive preservation into the background. Those who preferred preservation to access could not easily argue that preservation had greater educational impact than access to materials.

By the 1920s, the idea that access was paramount and preservation no longer a major consideration was taken for granted. Librarians were proud of their move toward access:

> The reader…will find, I think, that every advance in the service rendered by popular libraries has been due to an increase in accessibility and that this is closely connected with free access [to the shelves] and home use. (1926 P295b)

The concerns over preservation are rarely mentioned by this period, and the practices associated with it are seen as artifacts of a failed idea. By the mid-twenties, access-oriented practices, in the form of open shelves and home use, were taken for granted. It was simply accepted that education required readers to have unmediated access to books, and preservation, too closely tied to practices that denied that access, was relegated to the periphery of the field.

BRINGING AN IDEA INTO THE CORE

As shown above, ideas are sometimes pared away from the field's core. Ideas are also sometimes added, though it takes a perfect storm of influences, both internal and external, to bring an idea into the inner court. An example of this in the library field is information, an idea drawn into the core of the field in the 1980s and 1990s.

Information was not an alien concept to the field prior to this period. Librarians talked about the information in their books and other materials, but information was not a goal or driver of libraries. Materials were collected not because they had information in them, but because they contained knowledge that would aid in users self-education efforts. Although reference librarians answered many informational questions, those that were only brief data were labeled 'ready reference', and seen as work one could leave to clerks. Librarians were trained to answer real reference questions: questions that required research and had no simple answers, but allowed the librarian to act as a guide to the user in their search for knowledge.

Before the 1950s, information was only used as a justification of library work in very rare circumstances, and usually information was implied to be only a handmaiden to education. In the list of the three important new services being developed in libraries, including readers' advisory to provide reading guidance and cooperation with other adult education service to provide the needed books, librarians listed:

> An Information Service which will be prepared to give to any adult inquirer specific information as to opportunities for class work and correspondence study in any subject. (1925, P186b)

This is not a simple listing of information, but a service to connect people with the educational materials they need to educate themselves.

In the 1950s, information is seen as a justification for practice, but always paired with education. For example, David K. Berningham, chair of the ALA Committee on Intellectual Freedom, said: “As keepers of the data of free scholarship librarians wield powerful weapons. It is their obligation to keep these weapons-free ideas, freely expressed-clean and sharp” (1951 P135c). It is only in the 1980s that information is used as a sole justification for practice.

> The delivery of information is our primary goal. Every day we fight to justify our existence before the city administration by demonstrating our "public-library-as-information" concept. (1982 P166d)

There is a clear different here in the way information is used. Instead of a connector of services, as in the 1920s, or a subset of scholarship, as in the 1950s, librarians in the 1980s use information as a justification for the field itself, as the reason libraries and librarians exist. This is the mark of a core idea.

How did information move from a peripheral idea to a core idea of the field? A combination of technological and social changes deeply affected the core practices and understandings of the field as a whole, opening the way to this new core idea. There were three distinct areas of attack: technological changes altered the available repertoire of practices, social change altered the way outsiders and

field members viewed the purpose of libraries, and field members directly attacked the core ideas of the field as outdated in the face of the above changes.

Pressure from Technological Changes

In the early 1980s, publishers of reference works started offering CD-ROM versions of some of their products. The digital versions had the advantage of being searchable and, in some cases, costing less. Reference books had been going up in price at a rapid rate, sometimes over 100% increases from one edition to the next. Offering reference materials on CD also appealed to administrators who wanted to see the library keeping up with technology.

CD-ROM databases gave way in less than a decade to online versions of the same resources. Many libraries had joined regional interlibrary loan cooperatives and so had staff familiar with online resources. When libraries, as educational institutions, were able to get on the early Internet, they transferred the skills and practices they had developed with online databases and cooperative catalogs to using Internet resources, limited as they were. Early adopters sang the praises of this new resource in the field's main journals. Michael Gorman asked in 1981:

> What will be the impact and implications of an Electronic Library? First, it will give equal access to all the residents of the area. Libraries will be changed utterly when a resident of Chinchilla, Pa., can sit at a terminal in a local library or in any municipal building, survey all the bibliographic resources of the Pennsylvania Electronic Library, select an item and have it delivered. … Second, library use will not be conditioned by location or by physical limitations. … Residents of faraway towns, the handicapped, and

> others who now cannot use an individual library's facility will receive high-level service. (1981 P97d)

The possibility of resources being easily made available to even the smallest libraries was a compelling argument for many in the field since it tied in with the ideal of equal access for all. This type of access to all was the rubric of library service that had been sought after since the 1920s, the assumed requirement of a successful democracy.

One important difference between these digital resources and traditional reference books was keyword searching. Where books usually had an index that allowed a searcher to find notable mentions of important terms (notable and important being decided by the indexer), most digital resources had the ability to search the full text of each entry in the database. This meant searchers could find a term of interest wherever it might reside, and often used these searches to read snippets around the term of interest without reading the broader context of the entry or section. This led users and librarians to see these resources not as sources of knowledge (data in an illuminating context) but sources of information (data without context).

> In confronting information itself it is important to understand what we must resist. ... In the electronic environment, this relationship [between text and divisions by audience or topic] changes profoundly because the text has been transformed into an information lode to be mined for particular bits of information. These are rendered accessible as fragments tied to keywords, thesauri, registry numbers. Text can still be read as an unfragmented whole, but in a truly paperless society the notion of such a whole text becomes abstract. (1993 P1158d)

Early in this period, databases were limited to a computer or two, often at the reference desk itself where librarians could search for the user or at least help the user understand how to search. This was in part because of the difficulty of searching – each database had a proprietary protocol – but in part because computers were expensive and rare. In the mid-1990s, the Gates Foundation put together a grant program to provide Internet-ready computers to libraries, especially small, rural libraries that previously had no Internet access. This sudden availability of computers in even small libraries pushed practices related to information technology throughout the field. Services that had only been available to large, urban libraries were now accessible to small, rural libraries as well, and these new users were eager to learn from the experienced members of the field.

Add to this the development of search engines at the turn of the millennium, which opened the Internet's smorgasbord of information to even casual users, and the field's repertoire of practice exploded. Computers in libraries were a taken for granted feature by the late 1990s, thanks to the Gates Foundation. Internet access and search engines were common tools in reference services at libraries of all sizes. All of these practices focused on information technology and thus information: small, disintegrated pieces of data that could be accessed without context. Accounting for practices as providing information – rather than knowledge or education – became widespread within the field, pushing the idea of Information toward the core.

Pressure from Social Changes

The revolution in information technology affected more than libraries. The rise of information technology and the increased emphasis on information in business led to the creation of the information professions. In many cases, this was simply a re-branding of professions already in existence: computer scientists, publishers, even teachers (1987 P177d). Information professionals were portrayed as the new Brahmin class in an age of information overload. Librarians saw themselves as the epitome of an information profession, arguing that they had been organizing and disseminating information for over a century, before many of these other professions even existed. That the information discourse often ignored librarians was seen as a threat to the field:

> In an Information Age, the argument that libraries are no longer necessary is absurd but it is one we hear nevertheless. As computers make everyone a publisher (and therefore no one a publisher), as the Internet contains everything (and ultimately the meaning of nothing), who but librarians are equipped to make order of this chaos? (1996 P1429d)

At the same time, many libraries were facing budget cuts. The Reagan administration's example in questioning tax-spending led many municipalities to look at their own tax-supported services, asking whether they were getting a good return on their investment. Libraries were asked to prove their worth – and many turned to information technology to support them. Reading might be down, but computers were new, exciting, and modern. Keeping the community up-to-date technologically seemed to be a valuable service, even in communities where

literacy had lost its sparkle. As Joseph A. Ruef, director of the Windsor Public Library said:

> Regularly, in recent times, librarians are exposed to the view that "the demise of the public library" is near. In my view, this particular death announcement is premature! One reason is that the public library, especially when it is not substandard, is truly a bargain. A consideration of costs and benefits makes the point. (1984 P298d)

A third social trend pushed libraries even further toward an Information paradigm. A wave of predictions in the late 1980s and early 1990s claimed a paperless society was on the horizon and that printed materials, books included, were headed for a quick decline.

> F. W. Lancaster puts forth the sharpest projection: "Ultimately … libraries as we know them seem likely to disappear. Facilities will still exist to preserve the print-on-paper record of the past, of course, but they will be more like archives, or even museums, providing little in the way of public service…. [L]ibraries may have an interim role to play…to subsidize access to electronic publications… In the longer term, it seems certain that the library will be bypassed. That is, people will have very little reason to visit libraries in order to gain access to information resources." (1988 P579d)

Computers would provide everyone with all their information, no paper, books, or libraries needed. Librarians felt the need to address these predictions directly and often:

> "Reports of my death are greatly exaggerated." … Unfortunately, it is not so easy to squelch the false reports of the death of libraries that have been appearing in the press since the 1960's. The truth is that libraries are alive and well and adapting to a changing world. They continue to serve millions of grateful users in both old ways and new, despite the ravages of inflation and budget cuts. (1982 P177d)

Librarians did not simply argue that libraries were not dead or dying, they argued that information technology needed their particular expertise. Computers might make it possible to store massive amounts of textual or visual information, it would mean nothing if no one could find any of it. Users would be buried in an avalanche of information unless librarians helped them find their way:

> The doomsayers who predict the dispersion or demise of the library are wrong. As knowledge continues to multiply, the need for expertise-to collect, categorize, store, sort, retrieve, and advise and comfort bewildered users will also multiply. (1988 P579d)

They argued that libraries were not about books – they were about information in whatever format, as proven by collections of audiobooks, music CDs, and online databases. Libraries would provide information whether in books or e-books.

All of these social changes–the emphasis on information professions, pressures to prove economic value, and the push toward a paperless society–moved librarians toward an information paradigm. More of their accounts of practice included references to providing, accessing, or organizing information, tying in to the intense focus on information and information technology in their environment.

Pressure from within the Field

Under pressure of changing practices in response to technological changes and the pressure of social changes, some members of the field took direct aim at the core ideas of the field. Many of the new practices could be argued with

education, if sometimes with tortured definitions, but identifying librarians as information professionals required bringing information to center stage.

In the 1970s, some library schools had recognized that information was a rising star and began reworking their curricula and changing the names of their programs. The first to take the leap was Syracuse University's School of Library Studies in 1974, re-named the School of Information Studies (Taylor, 1979). Other schools were not far behind, mostly schools in the top of the field like University of Michigan and University of Washington, who changed their library science degrees into library and information science degrees. These schools did more than change their names: they changed their curricula to include classes in database structure, information seeking behavior, and developing metadata, building on traditional classes in thesaurus-building, reference services, and cataloging.

Many in the field accused the directors of these schools of pandering to the business community or university administrators, seeing the turn to information, sometimes to the exclusion of library, as undermining the field.

> Students discover that LIS faculty are not interested in books (in fact, we think they are dead), hear that surfing the Web is more important than reading, and learn that reflective reading is no longer as critical as retrieving bits of information to satisfy immediate needs (Cox, 2006).

Directors justified the revisions as offering graduates a wider field of employment on graduation and as a way to raise the profile of what was often the smallest school on a university's campus. They also argued that information was what

libraries were really about, accusing their accusers of depending too much on books to the exclusion of reality, which was no longer book-centered.

> Traditional librarianship is not what it was 20 years ago, and the directions and the shifts that I see in the curriculum are very much in harmony with changes that are happening in libraries as a whole. … We are focusing on processes and products and services that help people with information needs, and on the environment in which people have their information needs met. For those going into libraries, that is a very positive direction because it gives them a much better understanding of the entire information environment in which their patrons or clients will live. For those of our graduates who may be going into other kinds of institutions or areas, the user orientation and service ethic [imparted in library school] helps bring those values into that environment. (*American Libraries*, 1998)

Outside the domain of the library schools, a number of actors in the field saw the world of information as the obvious route away from a number of the threats created by the social changes listed above. If books were passé and information was the way of the future, why not define libraries as information centers? These librarians argued that libraries had always dealt in information, that they were the original information profession and had invented information organization, search, and dissemination. The focus on information should be embraced rather than rejected. As Herb White, Dean of the School of Library and Information Science at Indiana University said in his monthly column in *Library Journal*:

> When it comes right down to it, our future in the 21st century will depend first of all on how we see ourselves. I see us as information professionals, perhaps the only title we can still claim uniquely, but only if we hurry. We can claim to be school teachers or social workers, but there are already other schoolteachers and social

> workers, and they don't necessarily accept us into their clubs. (1990 P756d)

Some even saw a turn toward putting information at the heart of the field as the opportunity the field and profession had been waiting for. ALA Past President Robert Vosper said, "[C]omputer scientists once scorned librarians' need for automation. Now the scientists look to librarians as innovators and leaders in computer applications" (1986 P172d) while another librarian claimed:

> The new electronic information technology has begun to demonstrate print's limitations more clearly than any other development over the past 500 years, precisely because it provides the means to overcome these limitations. Indeed, as the electronic age progresses, it is gradually freeing recorded knowledge from its print confinement. This development, in turn, has the capacity to free librarians and libraries from their imprisonment by the book, providing that librarians seize the opportunity to transform their libraries from print repositories to electronic information centers (1992 P984d).

People might not value the educational mission of the library and might not think the recreational function was worth paying taxes for, but who could argue against an organization that was centered on managing the overflow of information everyone was struggling with, particularly when librarians had a century of experience dealing with information overload? These actors saw salvation in the heart of the threat others feared.

Adoption of Information as a Core Idea

With pressures at every level of the field–practice, society, and the core of the field itself–information moved to the core of the field, rising from under 5%

of the discourse to nearly 30%. As the 1990s unfolded and moved into the new millennium, librarians used information more and more often to support their accounts of practice, even without the support of education in many cases. More librarians seemed to take for granted that providing information is at the core of the field, even though the founders of the field almost never mentioned this function, even though early information services were clearly defined as educational.

A similar pattern can be seen in the adoption of access in the formation of the field. Technology adjusted the repertoire of available practice, making it possible to replace lost or damaged books and to keep libraries open for extended hours. Social changes pushed for more self-directed study, making closed shelves impractical. And finally, actors within the field pressed for access as a clear support of education at the core of the field.

Core ideas are not easy to add to a field, but when pressures are applied at every level, the field adjusts to the pressure by adopting familiar, but peripheral, ideas into the core. This allows the field to address the social and technological changes around them without losing their core – core ideas are added, but not necessarily replaced. Although access supplanted preservation for the most part, information has not displaced another core idea.

Maintaining Core Ideas

Core ideas, then, are maintained by their use, both in supporting actors' accounts of their practices as well as in defending the field as a whole. Actors draw on the core ideas of their field to support (or deny) a specific practice or set of practices. They also draw on core ideas to support their understanding of the field, reinterpreting those core ideas as needed to meet changes in their environment and maintain a relevant identity. It is actors' continual use that keeps core ideas salient to the members of the field. Ideas that cannot be reinterpreted to meet the social and technological changes facing the field fail and fade, particularly if, like Preservation, they become a threat to the field's relevance. Core ideas like Education and Access, which push the field to improve their work, continue to remain salient because they continue to be reinterpreted to meet new challenges.

In the following section, I will explore in more detail how actors maintain core ideas, including the specific actions they take and how those actions change over time. This culminates in the development of a process model of core idea maintenance through discourse.

CHAPTER VI

MAINTENANCE AND DISCURSION

In this chapter, I will explore how actors enact maintenance through discursive actions and how this translates into a process model of the maintenance of core ideas through discourse. First, I will revisit the discursive actions briefly introduced in Chapter III and explain how actors use them in two types of discourse, practice-centered and identity-centered. Second, I will explore how actors' use of discursive actions responds to differences in the field's social and technological environment in different periods. Third, I will develop a model of the maintenance of core ideas through discourse.

DISCURSIVE ACTIONS

The action of maintenance takes place in *discursive actions*, the specific actions taken by actors within the discourse. In the library field, I uncovered fifteen types of discursive actions actors use (see Table 4, p. 31). Most of these actions are used across all four periods, though some are developed in later periods or fall out of favor in certain periods. Discursive actions can either focus on the justification of practice through core ideas or directly on core ideas. Most take the former path, through actors' accounts of practice. *Accounts of practice* are actors' explanations of why they do what they do in their field and draw on the core ideas of the field to justify or deny specific practices or sets of practices. These accounts of practice are the focus of the practice-centered discourse. Some

discursive actions, notably *defending the field, bounding the field, defining identity*, and *defending identity*, are predominantly focused on the field's core ideas through discussions of the field's and profession's identity (see Table 6 below). These actions involve discussions of why the field or profession exists, justifying that existence by the core ideas for which the field stands, and form the heart of the identity-centered discourse. Other discursive actions are used both in the practice-centered and identity-centered discourses, but even among these mixed-use discursive actions, the practice-centered discourse is more common.

Table 6: Predominant discourse of discursive actions

Practice-centered	Mixed	Identity-centered
Demonizing the past	Connecting with the past	Bounding the field
Energizing the field	Noting approval	Defending identity
Envisioning the future	Noting reality	Defending the field
Noting need for field	Recognizing threats	Defining identity
Resisting change	Valorizing values	
Valorizing change		

In an example from the Expansion period, we can see how *defending the field* and other identity-centered actions are often used. Actors defended the public library as the people's university: "It is a tragic fact that thousands of men and women first feel their need of a formal education when it is too late to get it. But there is the public library—every man's university." The speaker mentions no specific practices here, just directly calls on of the core idea of Education as a reason for the field's existence.

The difference between this discourse focused around core ideas and the practice-centered discourse is clear in this example of *demonizing the past*, as the speaker criticizes the past practice of focusing library work exclusively on the book format:

> "I feel that we are not in the book business, but in education/ information/ recreation business. It follows that books are important tools to implement our mission, but by no means the only ones. I've obtained information from movies, conversations, computers, announcements, lectures as well as from books, and so has everyone else."

Here the speaker calls out specific practices – adhering to books vs. using multiple formats – rather than speaking directly to core ideas. The speaker is explicitly drawing on the core ideas of Education, Information, and Entertainment, but is addressing the practices of the field and arguing that the old practice of providing only book-based information is too limited in a modern setting that allows information to be stored and transmitted in so many other forms.

Discursive actions, then, are used in two ways, which can be seen as subsets of the field-wide discourse, each with its own patterns of maintenance. The *identity-centered discourse* focuses on the identity of the field and its members, justifying the field's continued existence. The *practice-centered discourse* focuses on accounting for and justifying the practices used in the field's work, whether noting the necessity of specific practices or resisting changes to long-held practices, or even envisioning potential future practices.

Although the identity-centered discourse is important for the maintenance of core ideas, it is less prominent in the overall discourse than the practice-centered discourse. However, though it only regularly uses four of the fifteen discursive actions, the identity-centered discourse averages about one quarter of the total discourse in any given period (see Table 7, below), with this percentage highest in the early periods and gradually lowering after the peak during the Expansion period. Actors spend a great deal of time discussing their profession's and their field's identity.

Table 7: Identity-centered vs. practice-centered discourse by period

	Formation	**Expansion**	**Consolidation**	**Expansion/Retrenchment**
Identity	26%	30%	21%	20%
Practice	74%	70%	79%	80%

The use of discursive actions can be further simplified into five mechanisms within the discourse. Mechanisms are "a delimited class of events that alter relations among specified sets of elements in identical or closely similar ways over a variety of situations" (McAdam, Tarrow, & Tilly, 2001: 24). In this case, they are the events that alter the relations among accounts of practice and core ideas, or that relate core ideas to themselves. Discursive actions are the enactment of specific instances of these mechanisms. Actors use discursive actions, then, to justify or deny accounts of practice, and reinforce, reinterpret, or undermine core ideas. Although some discursive actions are more likely to

appear in the identity-centered discourse or the practice-centered discourse, there is no similar alignment among discursive actions and mechanisms, in part because a single discursive action may accomplish the work of multiple mechanisms. For example, although demonizing the past is regularly used to deny accounts of practice, it is often used at the same time to support an alternate account championing different practices, and may also be, in the same act, reinforcing one or more core ideas. These mechanisms will be further unpacked in the explanation of the model in the final section of this chapter.

Discursive Actions across Time

Although most discursive actions are used in all periods, the patterns of use change over time. Some discursive actions are primarily focused on the identity of the field, while others focus more on the practices of the field, with the prevalence of each of these discourses shifting over time, as seen above (Table 7, p. 102). The patterns of use of specific discursive actions are seen in Table 8 below. Rankings are relative counts by period: the total number of quotations coded with a given action in a given period were divided by the total number of quotations coded with any action during that period. These values were then sorted from highest to lowest. Identity-centered actions are italicized to make them more identifiable. I will first discuss the dominant patterns of action in a given period, then explore the patterns specific discursive actions took over time.

Table 8: Patterns of discursive action use by period, with previous period rankings

	Formation		Expansion		Consolidation		Expansion/Retrenchment
1	Noting need for field (P)	6, 1	*Bounding the field (I)*	4,7,1	Valorizing values (P)	6,10,9,1	Recognizing threats (P)
2	*Defining identity (I)*	2, 2	*Defining identity (I)*	2,2,2	*Defining identity (I)*	1,4,3,2	Noting need for field (P)
3	Seeking attention (P)	9, 3	Valorizing change (P)	1,4,3	Noting need for field (P)	13,9,4,3	Valorizing the past (P)
4	Valorizing values (P)	1, 4	Noting need for field (P)	13,9,4	Valorizing the past (P)	8,13,11,4	*Defending identity (I)*
5	Noting approval (P)	3, 5	Seeking attention (P)	0,8,5	Energizing the field (P)	9,3,8,5	Valorizing change (P)
6	Recognizing threats (P)	5,6	Noting approval (P)	3,5,6	Seeking attention (P)	2,2,2,6	*Defining identity (I)*
6	*Bounding the field (I)*	4,7	Valorizing values (P)	5,6,7	Noting approval (P)	14,12,0,7	Envisioning the future (P)
8	*Defending identity (I)*	0,8	Energizing the field (P)	9,3,8	Valorizing change (P)	4,7,1,8	Valorizing values (P)
9	Valorizing change (P)	13,9	Valorizing the past (P)	6,10,9	Recognizing threats (P)	0,15,11,9	Resisting change (P)
11	*Defending the field (I)*	6,10	Recognizing threats (P)	6,1,10	*Bounding the field (I)*	0,11,11,10	Noting reality (P)
12	Demonizing the past (P)	0,11	Noting reality (P)	8,13,11	*Defending identity (I)*	0,8,5,11	Energizing the field (P)
13	Valorizing the past (P)	14,12	Envisioning the future (P)	0,11,11	Noting reality (P)	3,5,6,12	Seeking attention (P)
14	Envisioning the future (P)	8,13	*Defending identity (I)*	0,15,11	Resisting change (P)	5,6,7,13	Noting approval (P)
		11,14	*Defending the field (I)*	12,16,14	Demonizing the past (P)	6,1,10,14	*Bounding the field (I)*
		0,15	Resisting change (P)	11,14,15	*Defending the field (I)*	11,14,15,15	*Defending the field (I)*
		12,16	Demonizing the past (P)			12,16,14,16	Demonizing the past (P)

NOTE: Numbers show actions' rank over time, based on normalization of the number of quotations in a given action code by the total number of quotations with action codes.
(P)=practice-centered, *(I)=identity-centered*
A rank of 0 means the action was not used in a previous period.

Patterns of Actions within Periods

The library profession, like many of the professions developed in the nineteenth century, does not have the taken-for-granted legitimacy of the traditional professions (lawyers, doctors, clergy). This leads to a repeated focus on identity within the field (*defining identity, defending identity*), as well as repetition of the reasons the field is needed (*noting need for field*). Earlier periods concentrate more on defining identity, creating an identity that matched the challenges and opportunities of the period, but actors in the Expansion/Retrenchment period spend more time defending the identity developed in earlier periods. The increased threat in this last period makes the successes of earlier periods stand out more clearly in contrast.

Beyond this central struggle for legitimacy as a profession, different periods see different patterns of discursive action. The Formation period in which actors faced the challenge of convincing others of their necessity was particularly focused on *noting the need for the field*, but also other discursive actions to accomplish their goals. Actors *valorized the values* of the field, arguing that librarians alone were able to provide widespread lifelong learning since most students left school after sixth grade with no hope of additional formal education. Librarians alone, through the provision of books, could provide the resources an individual needed to continue their education even after college. Actors also *noted the approval* of outsiders, supporting their assertions of the field's worth

with quotes from speeches given by public figures, articles in major news outlets, and supportive actions from outside organizations like the Carnegie Corporation.

The Expansion period developed the field, greatly expanding the work that librarians did and the needs that libraries served. *Bounding the field* was the most common discursive action as actors argued for expansion of the field's boundaries, making territory grabs from education, particularly around the society-wide movement for increased adult education. Librarians chose not to challenge educators in organized classroom settings, but argued that most education was individual and mainly self-directed, perfectly matching the services of the library. In tandem with this, they *valorized changes* that had been made in the previous period (*valorizing the past*) such as open shelves and home lending that supported these territory grabs. They used these successful past changes to support new practices they hoped would cement the library field as the center of lifelong learning, including reference services and readers' advisory services. They continued to focus on reading as the core of library service (*valorizing values*) as well as pointing out librarians' dedication to codifying the universe of knowledge in service to education. Actors also spent effort *noting the approval of outsiders* who recognized the efforts librarians were making, particularly in adult education, and all they had done to establish the idea in their communities. Librarians were urged to adopt new practices that supported the more active view of libraries being promoted by leaders in the field (*energizing the field*).

Actors in the Consolidation period were concerned with solidifying the advances made in the field and ensuring it would be stable and able to meet future challenges. The field also dealt with American society's concern over communism. In the face of these needs, librarians turned their focus to the *values* of the field, reiterating their commitment to providing materials on every view, unlike the fascist states of pre-World War II Europe. Actors reminded the field of the successes of the *past*, *valorizing the work of the founders* of the field and the *changes* that had led to the growth of the field. They called for continued work (*energizing the field*) to fight censors and to provide educational programs, particularly group discussions, around important topics that would help citizens understand their role in a democracy. Continued emphasis was placed on outside *approval*, with the ALA counting repeated letters to their organization from President Eisenhower as a significant coup.

The Expansion/Retrenchment period is the most strongly differentiated of the four periods. The sense of being threatened grew with the advent of the Internet, but had been building with the increased use of computers and information technology, most of which was not developed by or for librarians. Actors felt the need to *recognize the threats* posed by these new technologies, as well as the changes these technologies could develop within the field. Librarians praised the work of past eras (*valorizing the past*), using these successes as a standard by which to measure the use of new technologies and practices based in them. At the same time, many were encouraging the rest of the field to adopt the new technologies, seeing them as a chance for revitalization in the field

(*valorizing change*). Because of rapid technological change, actors spend significant time *envisioning the future* of the field and the profession – would computers replace librarians? libraries? Both the technophiles and technophobes called on other members of the field to remember their *values*, whether they defined those values as providing resources to all or supporting the development of reading. The technophobes also struggled to *resist changes* proposed by technophiles, arguing that these changes would destroy the field.

Examining the distribution of actions by period (see Table 9, below) reveals another interesting pattern. In the first period, a limited set of discursive actions are used in the majority of the discourse, with *noting need for the field* taking almost 35%. The number of actions increases in the Expansion period, and these actions show up more evenly in the discourse, with the most prevalent at only 13.4% of the discourse. The concentration of the discourse increases in the Consolidation period. Though not concentrated to the extent of the Formation period's almost singular focus, this period has a number of actions that are rarely or never used. In the final period, the level of distribution of actions over the discourse seems to have increased somewhat, with more of the actions being used at moderate levels. This suggests that periods of expansion may encourage actors to try a greater variety of discursive strategies in order to deal with a widening discourse.

Different periods in the field's lifecycle show distinct patterns of discursive action. This suggests that actors respond to the differing needs of each period with actions suited to the challenges at hand rather than simply reiterating the

Table 9: Discursive actions by periods, showing percentage of use

Formation		Expansion		Consolidation		Expansion/ Retrenchment	
Noting need for field	34.8%	*Bounding the field*	13.4%	Valorizing values	16.7%	Recognizing threats	15.3%
Defining identity	16.8%	*Defining identity*	12.0%	*Defining identity*	14.7%	Noting need for field	13.9%
Seeking attention	16.0%	Valorizing change	10.1%	Noting need for field	11.1%	Valorizing the past	9.1%
Valorizing values	8.6%	Noting need for field	10.0%	Valorizing the past	10.4%	*Defending identity*	9.0%
Noting approval	5.2%	Seeking attention	9.2%	Energizing the field	9.0%	Valorizing change	8.5%
Bounding the field	3.4%	Noting approval	8.5%	Seeking attention	8.8%	*Defining identity*	7.3%
Recognizing threats	3.4%	Valorizing values	7.1%	Noting approval	8.3%	Envisioning the future	6.3%
Defending identity	2.9%	Energizing the field	6.3%	Valorizing change	7.5%	Valorizing values	5.7%
Valorizing change	2.6%	Valorizing the past	5.5%	Recognizing threats	4.5%	Resisting change	4.8%
Defending the field	2.1%	Recognizing threats	5.0%	*Bounding the field*	4.3%	Noting reality	4.4%
Demonizing the past	1.0%	Noting reality	4.3%	*Defending identity*	1.1%	Energizing the field	4.3%
Valorizing the past	0.5%	Envisioning the future	3.2%	Noting reality	1.1%	Seeking attention	4.0%
Envisioning the future	0.3%	*Defending identity*	2.8%	Resisting change	1.1%	Noting approval	3.4%
		Defending the field	1.3%	Demonizing the past	0.9%	*Bounding the field*	2.3%
		Resisting change	0.8%	*Defending the field*	0.5%	*Defending the field*	1.5%
		Demonizing the past	0.5%			Demonizing the past	0.2%

same actions used in the past. This last point is underlined by the fact that new discursive actions arose over time, and were sometimes even dropped out of the actors' repertoire. Actors' use of discursive actions is responsive to the environment of the field.

Patterns of Actions across Periods

A second view of the patterns of discursive actions is the changing relevance of actions rather than their relation to the developments of a period. Actions fall into one of four categories (See Table 10, below): dominant throughout, secondary throughout, emergent, or fading. Interestingly, each pattern contains one of the identity-centered actions (shown in italics), so there is no pattern associated overall with the identity-centered discourse.

Table 10: Patterns of discursive actions over time

Pattern	Action	Positions
Dominant throughout	*Defining identity*	2, 2, 2, 6
	Noting need for field	1, 4, 3, 2
	Valorizing change	9, 3, 8, 5
	Valorizing values	4, 7, 1, 8
Secondary throughout	*Defending the field*	11, 14, 15, 15
	Demonizing the past	12, 16, 14, 16
	Energizing the field	0, 8, 5, 11
	Noting reality	0, 11, 11, 10
Emergent	*Defending identity*	8, 13, 11, 4
	Envisioning the future	14, 12, 0, 7
	Recognizing threats	6, 10, 9, 1
	Resisting change	0, 15, 11, 9
	Valorizing the past	13, 9, 4, 3
Fading	*Bounding the field*	6, 1, 10, 14
	Noting approval	5, 6, 7, 13
	Seeking attention	3, 5, 6, 12

Four actions are dominant across all four periods: *defining identity, noting need for field, valorizing change,* and *valorizing values.* These dominant actions are constants in the discourse, never dropping below the top half of rankings and usually in the first quarter, and taking up between 35% and 63% of the discourse, depending on the period (see Table 11, below). Except for *valorizing change,* these actions focus on librarians: who they are, what they value, and why they should exist. These dominant actions are the core of the discourse: reminding the field and outsiders why the field exists, supporting the values and identity of the profession, and encouraging necessary change to keep the field relevant. This is the necessary work of maintenance in a field.

Table 11: Percentage of discourse by each pattern of discourse by period

	Formation	**Expansion**	**Consolidation**	**Expansion/ Retrenchment**
Dominant	62.8%	39.1%	50.1%	35.4%
Secondary	3.1%	12.4%	11.5%	10.5%
Emergent	7.1%	17.4%	17.1%	44.5%
Fading	24.6%	31.0%	21.4%	9.6%

Four actions are secondary throughout: *defending the field, demonizing the past, energizing the field, and noting reality.* These actions are not insignificant in the field, generally accounting for about 10% of the discourse, but do not rise to the prominence of dominant actions and are fairly stable in their positions overall. Two of these actions were not even used in the first period, perhaps underlining their lack of importance in the overall discourse. That defending the field is less prominent than defending the field's professional

identity may be an artifact of the library field as a professional field. Non-professional fields may not have the same division between the field and their collective identity. That field members connect to the past more than they criticize it speaks to the interest in maintenance: criticizing the past highlights failures in the field, undermining rather than maintaining the field. *Energizing the field* holds a position that is somewhat more prominent than the others in this group, but not prominent enough to be a dominant action. Its position underlines, however, the emphasis on promoting change within the discourse, as it is often paired with *valorizing change*.

Five actions are emergent, increasing in use over time from only about 7% to nearly 45% of the discourse: *defending identity, envisioning the future, recognizing threats, resisting change, and valorizing the past.* As a field develops, the body of accepted practice and the delineation of accepted identity become more completely defined. Although this definition creates greater unity and clarity for the field, it also creates a target for threats. Reasonably, actors work harder over time to defend the practices and identity in which they have invested. In an interesting juxtaposition, this desire to defend increases both the tendency to look back to the past and to look forward to the future, even building visions of the future on ideals of the past that have not been fully realized. The growing resistance to change seen in this pattern does not, however, undermine the dominance of the field's discourse around promoting change.

Three actions fade over time: *bounding the field, noting approval, and seeking attention.* These three actions were critical in the early life of the field as

actors strove to claim their territory and publicize the acceptance of their claims in and to other fields. As the field's claims are accepted, this work becomes less necessary. That all three drop precipitously in the fourth period may undermine the claim by some actors in the field that this is a period of expansion, or it may simply point out that this expansion is distinctly different than the earlier expansion period. This is an established and legitimate field adjusting, rather than creating, its identity and practices.

These patterns show us that the core work of maintenance is prominent regardless of the period of the field's lifecycle. In addition, the work seen as necessary changes from the early to late periods in the field, with publicity of territory claims prominent early and defense against perceived threats to the established norms more prominent later. Therefore, the ways actors maintain the field's core ideas changes over time, dependent on the stage the field is in. Although the mechanisms of maintenance remain the same, the enactment of those mechanisms through discursive actions varies, adjusting to address the lifecycle stage and social and technological changes affecting the field. Actors enact these mechanisms in both the practice and identity-centered discourses, though the prominence of specific actions in each changes over time. Maintenance, therefore, is always happening, but it is enacted differently according to the current needs of the field.

A MODEL OF MAINTENANCE OF CORE IDEAS THROUGH DISCOURSE

As noted in the introduction, maintenance of institutions does not mean that nothing changes in the field. Fields are constantly adding and removing practices to meet social and technological changes that affect their work, but these changes do not necessarily require disruption of the field's core ideas. Maintenance, then, occurs in the process of accounting for the practices of the field, and these accounts must respond to the social and technological changes in the field's environment. The remainder of this chapter will explicate the model, discussing how maintenance occurs in both the identity-centered and practice-centered discourses, as well as how technological and social changes affect the field. Finally, I will connect this model to the construct of institutional logics and explore how core ideas illuminate the internal workings of logics.

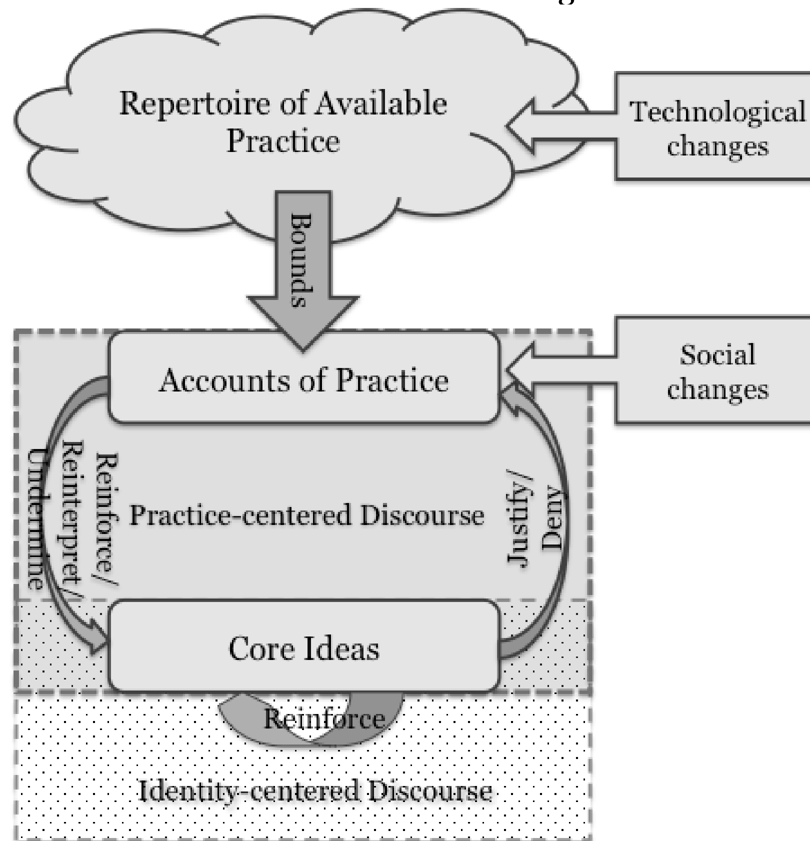
Identity-centered Discourse

Only one maintenance mechanism, reinforcing core ideas, resides within the identity-centered discourse, as this section of the discourse is mainly self-reflective. As discussed above, this discourse focuses on the existence of the field and the collective identity of its members, drawing on core ideas to justify both. This act of calling on the core ideas to justify the field and its identity *reinforces* the core ideas themselves by bringing them to the attention of field members and increasing their salience. The more members of the field hear about a given core idea in the discourse, the more it is taken-for-granted as part of their reason for being, and therefore, the more it is used in later iterations of the discussion of

who they are and why they exist. Reinforcement is a simple virtuous cycle, in which each mention strengthens the core idea drawn upon.

As seen in the model, Figure 1, below, the identity-centered and practice-centered discourses are not entirely separate but have a section of overlap around core ideas. These discourses sometimes overlap, with a single discursive action speaking to both why the field does what it does, and why the field is what it is, crossing between identity and practice. Actors draw on core ideas for both discourses, sometimes even at the same time.

Figure 1: A model of core idea maintenance through discourse



Practice-centered Discourse

The practice-centered discourse focuses on a field's accounts of practice, their explanations for why they do what they do. These accounts draw practices that actors wish to justify from the *repertoire of available practices*, which is the collection of all technologically feasible practices for the field, whether currently in use, once in use but now rejected, proposed, or never considered by members of the field. From this repertoire, actors choose a subset of practices they prefer, based on the social and technological environment, and work to justify them – or deny others' preferred choices - through accounts of practice. In the process of justifying or denying accounts of practice, actors reinforce, reinterpret, or undermine the core ideas of the field.

Actors most often use core ideas to *justify* accounts of practice by showing that the account refers to a set of practices that enact or support these core ideas. In this instance at the 1924 conference, ALA's President Locke used both Education and Democracy to justify librarians' entrance into the field of adult education:

> We represent a great democratic institution which can furnish not only the material resources by which this may be greatly aided, but we are reaching out to furnish interpreters of these resources so that individuals may equip themselves for intelligent service by becoming acquainted with the ideals that have inspired men to serve, and also that they may acquire the knowledge that will enable them to exercise a right judgment in all things. (1927 P355b)

He argues that librarians must act as interpreters of resources, and justifies it by saying this is how citizens are educated in order to be effective participants in a democracy.

Actors also use core ideas to *deny* accounts of practice. In the case of open shelves, proponents used the core ideas of Education and Access to deny the practice of closed shelves, claiming the practice was antithetical to both. In the following quote, Herbert Putnam, director of the Minneapolis Public Library, argues that libraries must collect popular titles to entice readers into libraries with closed shelves:

> Surely such subterfuge is both cowardly and unworthy of an educational institution. Why is it necessary? Is it not because we rely upon the catalogues to attract our readers instead of relying upon the books themselves? … [W]ith free access to the books the standard might be high; for he would then be reached by the novel individuality of the books appealing for themselves. (1891 P308a)

His claim is that these popular titles are not educational, that readers, given access to the shelves, would choose books of greater educational value, thus denying the validity of the practice of closed shelves.

But the justification or denial of practice is not, in itself, maintenance of core ideas. Accounts of practice are used to reinforce, reinterpret, or undermine core ideas through discursive actions. Just as in the identity-centered discourse, actors *reinforce* core ideas by the simple act of drawing on those core ideas in discursive actions. Drawing on a core idea within the discourse—as the speakers above do with Education, Democracy, and Access—brings them forward in the field's attention, increasing their salience, and often leading to their repeated use

by others. This tends to be a virtuous cycle: a successful discursive action draws on a core idea, which adds to the core idea's salience, which leads to other actors using the same idea to justify or deny particular practices, continually keeping that core idea at the heart of the discourse. For example, when librarians argued for adult education services to move from individual to group practices, they drew on the ideas of Education and Democracy, and used them to justify group discussion rather than individual study, which had been the focus in previous periods:

> I want to describe an old-new kind of group activity, which I hope will contribute … to the continuing revitalization of our democratic system of responsible political power. It is the discussion group. It is old because it is in the tradition of the Athenian City-state, the New England town meeting, and the Junto of Ben Franklin…. It is new because it applies some of the discoveries of recent Social-psychological research…. This sort of group activity is a type of informal adult education. It calls for more participation from every member of the group…. It relies less on the outside expert. (1952 P181c)

The speaker here argues in favor of this new practice because it provides participants with education, particularly education that supports democracy. Even his comparisons—the Athenian City-state, the Junto—are examples that call out the idea of democracy.

Actors *reinterpret* core ideas in much the same way, by using them in the process of justifying or denying accounts of practice, but in this case, they redefine the core idea to either better support their preferred practice or to better address social changes in the larger environment. As mentioned above, librarians used both Access and Education to support their claims to a central position in

the adult education movement of the 1920s. In doing this, they defined Education as requiring individually focused lifelong learning, something only libraries could provide. ALA's President Locke, addressing the 1927 convention, defined education here:

> But a real danger … is that we … revert in practice to the old idea-and a false idea-that education is a state that some day will be reached, after which no further effort will be required. We forget that education is a process that is ever going on. Were it not so there would be much less excuse for the presence of such an institution as the library. (1927 P355d)

He went on to note that schools ceased their work for most before they were even adults – but the library persevered. In that vein, librarians reinterpreted the idea of Access, saying that only libraries and public schools were available to all people, and public schools were not available to adults, thus making libraries the obvious continuation in adulthood of childhood education provided by public schools. This interpretation of Access, rather than simply requiring the open shelves of earlier years, pushed the field to expand library service to areas and people who had not had access, leading to the development of services such as bookmobiles and books-by-mail to proved access to rural users.

Actors *undermine* core ideas in accounts of practice when they argue that core ideas support practices that are no longer tenable because of social and technological changes, or when they argue that a core idea supports practices that are harmful to the field. This occurred most prominently in the fight for open shelves when proponents attacked the core idea of Preservation. They argued that Preservation limited Access unnecessarily in the face of advancing printing

technology that led to greater availability of books. These arguments eventually undermined Preservation as a core idea of the field. Actors have more recently argued against Education as a core idea in favor of Entertainment, claiming that library practices supported the latter more effectively, and that using the library for entertainment created more support for libraries in local communities.

In the next section, I move from exploring the mechanisms of maintenance within the field's discourses to examining the outside pressures to which the field must respond, generally by changing practices. As seen in the previous chapter, these external pressures can sometimes affect the field sufficiently that even core ideas can be lost or added.

External Pressures

The discourses of the field are influenced by a number of external factors. *Technological changes* affect the repertoire of available practices by making technologies available or unavailable as new technologies supersede the old. The practices of the field are not determined by the changes in technology, but are bounded by the technological feasibility of a given practice. For example, the practice of collecting DVDs was only possible once DVDs were invented and made available for purchase, while the development of the cassette tape and its wide adoption led to the gradual disappearance of eight-track tapes and their players, making collection of this format less feasible as a justifiable practice. An account of practice that suggested an eight-track collection in a public library in

the 1990s would prove difficult to justify, while it would considerably easier to justify a collection of CDs at the same time.

Social changes more directly affect accounts of practice by changing the ways actors can explain their practices to the larger environment as well as other members of their field. For example, the emphasis put on fiscal responsibility by Republican administrations during the 1980s led to a number of accounts of practice that focused on the economic value of particular practices. Accounts that do not effectively adapt to changes in the social environment tend to fail. For example, through the end of World War I, librarians were champions of censorship, even participating in book burnings to rid libraries of German-authored and pacifist books during the war. However, as fascist states began to rise in Europe and held widely-publicized book burnings to purify the state, librarians who were against censorship were able to use the sentiment against these states to push ALA into creating the Library Bill of Rights, which called for all librarians to stand against censorship of any kind in library collections (Martin, 1998; Dickson, 1986). Librarians still in favor of censorship found the change in public sentiment difficult to overcome in justifying the practice.

Technological and social changes can also work together to press for change in accounts of practice. Early advocates for Access were aided in changing library practices by both changing expectations for education, which called for letting students find their own interests, and by changing technology, such as the introduction of the electric light, which let libraries stay open into the evening without risking damage to their books' bindings caused by gas lights.

Maintenance of Core Ideas and Institutional Logics

Institutional logics include the "set of material practices and symbolic constructions that constitute organizing principle for broader suprarational orders" (Lok, 2010: 1307, following Friedland and Alford, 1991). As seen in the model above, core ideas are the touchstones of accounts of practice and the symbolic constructions within a field. This model, then, explains the internal working of institutional logics, and creates a clear model for agency within the institutional logic framework for institutional change, which has been criticized for sidestepping the question of agency (Willmott, 2010).

In the model above, the practice-centered discourse is the internal working of a logic. The accounts of practice are the narrative of the logic, the system of belief that supports the practices associated with a given logic. These accounts are rooted in the field's core ideas, which actors draw on to justify the accounts that explain the logic. Agency is introduced via the discourse between accounts and core ideas – actors may justify or deny these accounts, supporting or undermining the logic they embody.

Maintenance of core ideas takes place within an institutional logic in the act of justifying the logic's associated practices. A field's core ideas, the focal institutions for this study, are inextricably linked to its accounts of practice, which cannot be fully understood without examining the social and technological environment in which the field finds itself at a given point in time. Most studies of institutional logics examine the upper half of this model, focusing on changes in practice, and leaving the lower half unexplored. This study balances our view

of the interaction between the central ideological institutions of a field and the logics it practices under.

Just as logics change over time, so to does the use of discursive actions within a field. Though the mechanisms of change and maintenance remain, specific discursive actions are chosen to meet the challenges of a given period. In the next chapter, I will give a summary of my findings and explore the implications of these findings for organizational theory.

CHAPTER VII

DISCUSSION

Although scholars have been studying institutions for decades, certain questions have not been asked because the answers were taken for granted. As our understanding of institutions has grown, our questions have evolved from "why are firms so much alike?" to "how do we explain change in institutions?" to "how do actors change institutions?" This recent focus on change has raised further questions, in part because it questioned the stability of institutions, something that had been generally taken for granted.

Maintenance and change are flip sides of the same coin. Just as it became apparent in this study that maintenance cannot be studied without also examining change, the reverse is true: studying change without acknowledging the work of maintenance gives an unbalanced view of institutional processes. Organizational theory has thus far focused primarily on changes in institutions without directly addressing the agency invested in maintaining what already exists. Studies have generally assumed maintenance as an equilibrium state between periods of change, focusing on what precedes change or who enacts change. However, agency that enables change also enables maintenance, often through some of the same mechanisms.

In this study, I have explored a specific type of institution, the core idea of a field, and examined how those institutions can be maintained across long periods and through many changes in other areas of the field. This helps us to

understand not only how institutions last, but also what actors working for change are pushing up against. By delving into the underpinnings of a field, we can better understand how both change and maintenance can occur.

In this chapter, I will give a summary of the findings of the study and outline its limitations. Then I will explore the implications for theory that arise from these findings, including areas for future research. Specifically, I will examine how understanding the maintenance and change of core ideas furthers our understanding of institutional processes; how the links between core ideas, logics, and identity help to better illuminate all three constructs and their functions in institutional maintenance and change; how the model of maintenance helps us to understand the state of dynamic stability of organizational fields' core ideas and practices; and finally, how a focus on extended longitudinal studies can enhance the development of models of institutional processes.

SUMMARY OF FINDINGS

This study set out to answer the question of how institutions, specifically core ideas, were maintained in the face of social and technological changes, if at all. Several findings arise from this examination of public library history. First, core ideas are maintained through use and reinterpretation. Previous research has focused on the stability of institutions as taken-for-granted and assumed that the weight of tradition would maintain core ideas until a jolt disrupted them

(Greenwood et al., 2002; Jepperson, 1991). This study shows that institutions are maintained not by default but by activity, and the activity is more than the repetition of institutionalized practices (Barley and Tolbert, 1997). Actors draw on these core ideas to explain why particular practices or points of view are valid, how the field should respond to challenges, and who they are as a group. They also reinterpret the meaning of these core ideas to tailor them to challenges. By constantly calling on and reinterpreting core ideas within the discourse, actors keep these ideas salient and maintain them as the central concepts within the field. These activities align more closely with Lawrence and Suddaby's (2006) reproduction of norms than adherence to rules, likely because core ideas do not define, though they may underlie, rules. Core ideas are a cognitive, rather than regulative, construct.

Additionally, maintenance activity, although using the same mechanisms Over time, adapts to the differing needs of the field as it grows and matures. Actors develop additional discursive actions and choose discursive actions that meet the challenges of a given period. Discursive actions can take on different roles as dominant or supporting actions in the discourse, and some actions emerge over time as dominant, or fall from dominance as their role lessens.

Process Model of Institutional Maintenance through Discourse

A specific outcome of this study is the process model explaining how actors within a field maintain the field's core ideas through their use to justify or deny accounts of practice. These accounts define which practices in a field are

legitimate, and are influenced by both social and technological changes external to the field, as well as the changing definitions actors use for core ideas.

In the process of developing this model, I delineated the concept of core ideas, the institutionalized concepts at the heart of a field that act as the touchstones of the field's work and identity. These ideas are deeper than identity or institutional logics, forming the underpinnings of both, and are the criteria by which actors in the field assess the fit of proposed identities or logics. Redefinition of these ideas creates the building blocks for new identities, logics, and accounts of practice. In this sense, core ideas are at the root of both change and maintenance within a field.

Previous research has suggested that institutional work need not focus solely on creation, maintenance, or disruption, but may be focused on any number of these functions at the same time (Creed, Dejordy, & Lok, 2010). This can be seen in the model developed here, which shows how actors use core ideas to justify or deny accounts of practice, legitimizing or delegitimizing sets of practices. Thus a single discursive act can simultaneously justify a new practice (creating) while supporting a complementary established practice (maintaining) and undermining an accepted practice that is in opposition to those supported (disrupting). Turning the focus toward core ideas, a single discursive action can be maintaining a core idea while undermining a practice. This distinction between core ideas and practices becomes more important when discussing institutional logics and identity, as elaborated in implications section below.

Limitations

This study focuses on a highly institutionalized field, one in which positions, policies, and procedures are regulated by widespread social understandings (Meyer & Rowan, 1977). In such a field, it is likely that core ideas, the root of those social understandings both within and outside the field, may have a more apparent effect on the field's actors than they would in less highly institutionalized fields. However, all but the most emergent fields have some ideas at their core, some central understanding informing their identity and practices, and so will likely have similar maintenance processes. Future research might explore whether in less institutionalized fields the pressures of social and technological change may carry more weight than in highly institutionalized fields, or explore the process of the emergence of core ideas.

In addition, in privileging the published discourse over the spoken discourse within the field, it is possible that some voices-those that achieved publication-were given greater weight than others-those not published for one reason or another. I have attempted to balance the voices in the discourse by including the letters to the editor, but ideally a study of this sort would include interviews with unpublished members of the field. In an historical study such as this, one could only interview those involved in the most recent era, therefore privileging the present over the past.

IMPLICATIONS FOR THEORY

Understanding Core Ideas

The social structure of a field is defined by the field's institutions (Scott, 2005). The most central institutions of a field are its core ideas, which are at the root of both successful change and successful maintenance. Practices are justified as accurately reflecting those core ideas and fail when they cannot be justified as such, even if they align perfectly with the technical requirements of the field (Scott & Meyer, 1983). Past research has clearly defined how legitimating frameworks similar to core ideas are used, but not how they are maintained, usually suggesting that they are simply created and continue to exist as part of the sedimentation of values and ideals (Cooper, Hinings, Greenwood, & Brown, 1996).

Core ideas do not just continue to exist. They can be added or removed from a field, but when they are maintained it is through continuous use and reinterpretation. Actors use core ideas as touchstones for the field to judge both identity claims and the appropriateness of practice. These core ideas are continuously reinterpreted, but this reinterpretation does not undermine or change core ideas, instead strengthening them in their ability to provide the needed justifications by enhancing their multivocality.

Many scholars have recognized multivocality as a necessary part of institutional change. Actors seeking to create change take advantage of multivocality within fields, drawing on the fragmented set of meanings within the

field (Clemens & Cook, 1999; Schneiberg, 2007; Symon, Buehring, Johnson, & Cassell, 2008), whether that multivocality takes the form of lack of consensus (Greenwood & Hinings, 1996), ambiguity and competition (Goodrick & Salancik, 1996), or contradictions between or within institutions (Creed, Scully, & Austin, 2002; Suddaby & Greenwood, 2005). Actors are able to interpret these multivocal institutions to create narratives or accounts of practice that support their preferred view of the field and its practices (Hall & Thelen, 2009; Zilber 2007).

Core ideas' multivocality, then supports the dynamism of the field by supporting the reinterpretations actors use to support new practices needed to address social and technical changes. These changes, because they are supported by the core ideas need not threaten field members' collective identity or their sense of why the field exists. Discourse drawing on the core ideas is likely to lead to successful adoption of practices because new practices that can be linked to existing ideals, such as core ideas, are more likely to be institutionalized (Maguire, Hardy, & Lawrence, 2004). That there is often conflict over changing accounts of practice is no barrier to a field's dynamism, since active opposition by supporters of current practices can also help in promoting new practices (Lounsbury & Crumley, 2007), in part because the opposition keeps the conversation moving, giving repeated opportunities for proponents of new practices to explain their new interpretation of the core ideas at hand. Practices may thus change radically so long as they are justified with the same core ideas without undermining accepted field identities because these identities draw on

the same core ideas, rather than being defined by practices. Additional research could examine this steadying effect of core ideas in fields under pressure to change, or the differences in the way fields with flexible and inflexible core ideas address change.

Core ideas that prove too inflexible to be reinterpreted to meet the needs of a given era will fade from the core of the field. Oliver (1992) argued that deinstitutionalization occurs when social, political, and functional pressures became sufficient to lead actors to gradually cease using or to outright reject a given institution, while Ahmadjian and Robinson (2001) argue that deinstitutionalization is the result of practices losing their institutionalized meaning. The removal of a core idea from a field occurs when it cannot be used effectively to meet current challenges within the field. If a core idea is defined too narrowly, or too closely aligned with a particular set of practices, changes in technology or society may lead to its demise, or at least to relegation at the periphery, rather than the core. Ahmadjian and Robinson (2001) focused on practices, and a view focused on core ideas helps to build on this idea of loss of meaning, since core ideas are generally the source of meaning by which practices are justified. Core ideas fall out of use because they no longer serve the function of a core idea: to act as a touchstone for accounts of practice and identity. Additional research could fruitfully focus on the interaction between failing practices and the core ideas that support them, particularly in a case where the core idea itself fails. This would clarify the differences between changes of practice based in stable but reinterpreted versus changing core ideas.

Few studies have examined deinstitutionalization (Dacin, Goodstein, & Scott, 2002), and fewer have examined the agency involved in purposeful deinstitutionalization (Lawrence & Suddaby, 2006). Researchers have argued that deinstitutionalization processes are distinct from processes of institutionalization (Oliver, 1992; Maguire & Hardy, 2009) and maintenance (Lawrence & Suddaby, 2006), This study suggests that the mechanisms underlying agentic action around disruption and maintenance of core ideas may be related, in that they follow similar pathways within the practice-centered discourse, where core ideas are both reinforced and undermined through actors accounts of practice. In addition, the introduction of new practices, maintenance of current practices, and disruption of current practices all occur within that same discourse through actors' justification or denial of accounts of practice. This suggests that the distinctions between these processes may be more of degree than kind, and argues for the need to study instances of each within a single context to more completely explore the similarities and differences between these processes.

Ideas can also move from the periphery to the core, becoming institutionalized as core ideas. To move from the periphery to the core, an idea needs to be in harmony with technological and social changes affecting the field, as well as being supported by field members as a viable touchstone for both practice and identity. The process is similar to the model of institutional change proposed by Greenwood, Hinings, and Suddaby (2002), but has some specific differences. Their model suggests that change comes from exogenous jolts to the

field, leading to deinstitutionalization of current practices or ideas, then innovation to develop new potential institutions, followed by theorization of both the field's failure and possible solutions, then diffusion of those arguments, and finally re-institutionalization around the new practices or ideas.

In contrast to Greenwood, Hinings, and Suddaby's model, new core ideas do not seem to appear from beyond the field, but are instead ideas already in the field, just not central to it. Additionally, core ideas appear to be harder to institutionalize than practices, since both social and technological changes seem necessary to draw in new core ideas. This could be an artifact of the library field, but the central and enduring nature of core ideas, particularly when compared with practices, suggests that greater pressures are needed to centralize core ideas.

The Links and Differences between Core Ideas, Institutional Logics, and Identity

The construct of core ideas helps us to differentiate the boundaries between logics, identity, and the root institutions from which they draw. Logics contain practices and systems of doing, and, as currently constructed, are generally a field-level construct that delimits the boundaries of appropriate action within a field (Lounsbury, 2002; Reay & Hinings, 2009). Identity is distinctive, exclusive, and generally exists at the level of both the individual and the organization or profession (Whetten, 2006). Core ideas are inclusive and constituted at the level of the field, and support accounts of practice but do not themselves delimit practice, since reinterpretation can adapt them to new sets of

practice. Core ideas, then, support both logics and identity, and in being used to support them, are maintained.

Institutional Logics

Core ideas illuminate the internal workings of institutional logics. Although Friedland and Alford (1991) defined institutional logics as societal level influences, many researchers have defined logics as a field-level construct, saying logics are created within the field and are taken for granted as the patterning of practice (Purdy & Gray, 2009). Logics are also seen as the organizing principles of the behavior of field participants, and include the field's belief systems and associated practices (Reay & Hinings, 2009; Lounsbury 2002). These conceptions of logics (which perhaps should be called field logics rather than institutional) portray them as having two parts—a set of practices and the belief systems the practices are based in—which combine to create the principles of behavior.

The process model developed in Chapter VI shows that practices are justified through actors' accounts of them, supported by core ideas. If we overlay the definition of logics on this model, it appears that core ideas and accounts of practice are actually the internal workings of logics. Accounts of practice are a set of beliefs—the beliefs in which a field bases its practices. Those accounts are justified and underpinned by core ideas. Accounts of practice are contested when changes in practice are proposed, the situation described in most studies of logic contests. Clarity in these constructs may help to better delineate research on

logics, differentiating between the complex of practices and belief systems, and the core ideas that underpin them and are generally more flexible; core ideas are able to adapt to changes, while practice are themselves changed.

Understanding the underlying constructs of logics and how they relate to core ideas (which are not in themselves systems of belief, but singular ideas, touchstones for systems of belief) helps us to explain why some contests between logics may resolve as they do. Logics that effectively draw on the core ideas of the field should survive. This supports both instances where one logic wins out over another, such as the change in form of accounting firms (Greenwood & Suddaby, 2006), and instances where multiple logics co-exist within a field, such as the Stanford music department's ability to function under both technical and commercial logics (Nelson, 2005). In the first case, the winning logic is successfully aligned with the core ideas while the defeated logic is not. In the second case, all of the multiple logics have successfully aligned with core ideas, though possibly through differing interpretations of those core ideas. Even in instances with a dominant logic and one or more non-dominant logics, the survival of non-dominant logics is explained by successfully tying in to core ideas, or actors' use of their knowledge of the context, as has been explored in organization-level study of logics (Reay & Hinings, 2009). Future research could further unpack this relationship, tracing the changes or contests around logics and the related interpretations of a field's core ideas. With the addition of core ideas, it is possible that field level studies may be able to discern the multivocality of logics more commonly found at the organization level.

In addition, understanding the internal working of logics helps to understand agency in a logics view of institutions. Most research on logics has sidestepped the issue of agency (Willmott, 2010), seeing actors as being limited in agency or denied agency unless multiple logics give them the ability to manipulate the interstices (Purdy & Gray, 2009; Reay & Hinings, 2009). The process model developed here contains two discourses, one centered on practices and one centered on identity issues. In the practice-centered discourse, actors are able to affect the delimiting power of logics on practice by reinterpreting the underlying core ideas to allow a greater breadth of practice. In the identity-centered discourse, actors are able to address the pressures logics put on identity by focusing on the underlying core ideas from which both logics and identity draw. For example, as libraries moved from a logic of materials for education to materials for information, librarians were able to address pressures to change their identity from educators to information providers by underpinning accounts of information practices with the core idea of Education (information as the stepping stone to knowledge, instead of information as raw data), thus bringing the possibly divergent identities together.

Identity

Identity and core ideas are closely related, but core ideas help in understanding identity's roots. Whetten (2006) is very careful to differentiate identity from similar constructs. Identity must be central, enduring, and distinctive. As mentioned previously, core ideas are central and enduring, but are

not distinctive, being shared among many fields, and are sometimes even used by field members to draw similarities between fields with distinctive identities, such as libraries and schools. Actors within a field continuously call on core ideas to reinforce the field and their collective identity, even when the field or identity is not directly threatened.

Because of the close relationship between identity and core ideas, hints of core ideas are sometime seen in research on identity. For example, in a study of differing perceptions of core competencies between professional groups in an orchestra, Glynn (2000) denotes this conflict as a conflict of identity. However, she clarifies this as differing views based on the professions' "legitimating values" (Glynn, 2000: 295). These legitimating values were ideas like "artistry" or "fiscal responsibility" – these are core ideas, the roots of identity, but not distinctive in and of themselves. Nor are they logics, being simply ideas, the root but not body of a set of practices.

As with logics, the construct of core ideas helps to delineate more clearly what is actually identity versus ideas related to identity. The ideas Glynn notes as being at the heart of the professions' differing views are related to their identities, but do not make up the identities themselves. This leads to the possibility of examining how professions with similar core ideas might work together differently than those with different core ideas. The level of differentiation between the ways professions approach a problem may well be related to differing core ideas, or even differing interpretations of the same core ideas. Understanding these different approaches could help organizations that

encompass multiple professions by taking into account their various core ideas in developing how these professions will interact. By differentiating between identity and core ideas, researchers can better develop theory that captures the distinctiveness of identity and the underlying flexibility of core ideas.

Another differentiation between core ideas and identity is their disparate roles in change and maintenance. Identity is an important source of resistance to change when a field is in transition between logics or sets of practices (Meyer & Hammerschmid, 2006; Townley 1997), particularly when dealing with professional identity (Marquis & Lounsbury, 2007). Identity can be associated with change, but often requires the creation of a new identity to promote change (Creed et al., 2002; Maguire & Hardy, 2009; Suddaby & Greenwood, 2005). Core ideas are also associated with both resistance to change (maintenance) and with change, but, unlike identity, core ideas remain the same regardless of which purpose they are serving. Reinterpretation creates a new frame from which to view a core idea, but does not change the idea itself. Understanding this differentiation helps us to clarify which of these constructs is at work in a given situation, and may help to explain how actors can retain their identity while promoting institutional change.

The relationship between core ideas and identity opens up areas of further research. Core ideas can be shared by multiple fields; identities cannot. This proposes the question of what the relationship is between distinct identities with shared core ideas, and whether there are similarities between fields with shared core ideas. In addition, core ideas offer another view from which to examine

threats to and changes of identity – whether from changes in the field's practices or its core ideas.

Identity and Logics

Core ideas also help to clarify the relationship between identity and institutional logics. Lok (2010) explored the relationship between identity and logics through the construct of identity work, the work an individual does to rectify their self-image with the available identities within a given institutional context. In examining the rise of the logic of shareholder value in the business community, he found that actors used identity work to resist the identity implications of the new logic, yet at the same time they reproduced the new logic within their field. Lok argues that identity work may explain why some logics are embraced or resisted: actors resist those logics that are contrary to their individual identity.

Lok focuses on the individual identity, but individual identities are closely related to collective identity, "an individual's cognitive, moral, and emotional connection with a broader community, category, practice, or institution" (Polletta & Jasper, 2001: 285). We define ourselves by our memberships in various groups – and we expect those groups we are members of to reflect our conceptions of our individual identity. Collectively, Lok's financial specialists and the librarians in this study accepted or rejected logics in their fields based in part on whether they could justify practices promoted by those logics with the core ideas on which they based their collective identities.

As delineated above, both logics and identity draw from the same root, the core ideas of the field. Identity, specifically, is the work of the identity-centered discourse, in which actors call on core ideas of the field as the reason for their identity. What Lok (2010) describes as identity work is a part of the work of the current study's identity-centered discourse, which in some cases resists the changes made in the practice-centered discourse. As noted above, the practice-centered discourse shows us the internal workings of logics. The link between these two discourses is core ideas.

Adaptation through Maintenance

Core ideas explain how fields can, in the long term, adapt to social and technological changes without losing their focus. Change and maintenance are often seen as opposites, working against one another, but this is not necessarily true. Researchers have examined cases where the maintenance of institutional contradictions or plurality has allowed greater flexibility. Internalized contradictions are a source of change for institutions (Clemens & Cook, 1999), and contradictions held over time create flexibility for field actors (Reay & Hinings, 2009). In these cases, maintenance of the contradictory logics or visions within a field support continual change.

Research on multivocality within institutions, in particular, has looked at the way actors can move within the interstices of multiple logics or visions in order to reinterpret their experience, sometimes in subversive ways (Steinberg, 1999). The flexibility of multivocal institutions can be seen in the multiple ways

actors define themselves and their place in the field (Zilber, 2007) or in manipulating the area between multiple logics to adopt practices that none of the logics would readily support alone (Nelson, 2005). Multivocality allows flexibility without changing the institutionalized logics or visions of the field.

I suggest that another source of multivocality, and this flexibility, in a field can be the core ideas of the field. Rather than requiring a single set of rigid definitions of appropriate behavior or practice or identity, as logics generally do, core ideas are broad, encompassing multiple definitions and enabling actors to address the changing pressures on and within the field. Those fields with core ideas that lend themselves to wide reinterpretation have within them a means of adaptation that does not require a rewrite of identity. Technological or social changes that require new practices, if justified through existing core ideas, can be adopted without threatening the field's identity since the core ideas are the root of both. Identity threats often create resistance to change (Lok, 2010; Meyer & Hammerschmid, 2006; Glynn, 2000). If this threat can be avoided or ameliorated by framing the changes within the field's core ideas, change can proceed more smoothly. In addition, a field needs only one core idea that is amenable to reinterpretation to achieve this flexibility, rather than requiring the maintenance of a set of contradicting logics or visions.

Temporality

This study has important implications for how we consider temporality in institutions. Many studies take a relatively short view of the focal institution,

often measured in months or years. Examining the development and maintenance of institutions across longer periods of time – measured in decades – provides a different view. In the current study, for example, a shorter view of the field might see only the change in practices or the rare changes in core ideas, rather than the long-term stability of the majority of the field's core ideas. The apparent changeability of core ideas evidenced in the Formation and Expansion/Retrenchment periods, if the study examined only one period of the field, would paint a distinctly different picture than that made visible by a longer view. This underlines the need for studies that take this longer view in order to better understand the often slow-moving processes of institutions and fields.

Additionally, the differences in actors' use of discursive actions over time points out another reason to take the long view. Although underlying mechanisms remain stable over time, they are enacted differently depending on the period in which they are examined. The discursive actions of the first and final periods are clearly different, and without the full four periods, patterns of emergence and fading would not be visible.

Finally, different parts of the institutional environment move at different speeds. Like the second hand of a clock, the cycles of practice adoption and replacement move relatively quickly across the backdrop of the field's history, changing in a matter of a few years. Logics, as an intermediate speed construct, can be compared to the minute hand: they tend to remain in place for decades, perhaps replacing some part of their set of practices but keeping their belief systems stable. Core ideas move across the face of the field like the hour hand of a

clock, changing slower than either practices or logics as they hold together the heart of the field's identity. Without taking a long view of an organizational field, it may be difficult to differentiate "ephemeral" logics from enduring core ideas. Rich, longitudinal archival studies are necessary to examine these slower patterns of social construction.

CONCLUSION

In this study, I have sought to examine in more detail how a particular type of institution, the core ideas of a field, is maintained across time. As I have argued, maintenance and change are two sides of the same coin, so it is impossible to fully examine one without touching on the other. Core ideas support both maintenance and change within a field, connecting logics, practices and identity. Core ideas are themselves the field's deep roots from which grow many of the constructs at both the field and organizational levels.

The question at the root of this study was, how do things last? We live in an age of ephemera where change seems always with us, each day a new fad, a newly famous someone, and yesterday's wonders are forgotten. In the face of this manic change, there are still those things that remain year to year and generation to generation. Understanding how these things continue to maintain their relevance, continue to feed our souls so that we cherish them, speaks to what makes us human.

APPENDIX

HISTORY TEXTS USED

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