



IE UNIVERSIDAD

TESIS DOCTORAL/ DOCTORAL
DISSERTATION

ESTRATEGIA EN Y EN TORNO A CUESTIONES
SOCIALES CONTROVERTIDAS / STRATEGY IN
AND AROUND CONTESTED SOCIAL ISSUES

SHUYAO (STEVEN) ZHOU

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Doctoral Thesis Advisor: LUIS DIESTRE MARTIN

ABSTRACT

This dissertation examines strategy in and around contested social issues. I ask how issue contestation shapes the strategic choices for both actors in and outside the immediate issue field. This is considered through three chapters that are a literature review and two quantitative studies. Chapter 1 reviews the current and multi-disciplinary literature on strategy in contested social issues. It identifies common patterns in decision-making, antecedents of engagement, and consequences across industrial organizations, nonprofits, advocacy groups, and different hybrids. Chapter 2 then specifically studies the resource mobilization under threat in the U.S. pro-vaccine movement. Using panel data on social movement organizations from 2005 to 2023, it shows that rising anti-vaccine threat increases contributions, but mainly for issue-specialist and short-term-oriented organizations. In Chapter 3, I study advocacy giving by S&P 500 firms from 2018 to 2024. I find that firms are more likely to support causes that match employee preferences but are also more likely to use low-visibility direct giving when the nonprofit recipients are politically misaligned with their local environment. Together, this dissertation shows that strategy in contested issues depends on position, audience conflict, and stakeholder structure of the organization. The dissertation thus provides a broad framework for the management of sociopolitical issues across actor types. It also particularly explains when threat redirects support within an issue, and the concealment of philanthropy as a distinct nonmarket strategy of firms in a polarized society.

RESUMEN

Esta tesis examina la estrategia dentro y en torno a cuestiones sociales controvertidas. Me pregunto cómo la contestación en torno a una cuestión moldea las decisiones estratégicas tanto de los actores situados dentro del campo inmediato de la cuestión como de aquellos que se encuentran fuera de él. Esta pregunta se aborda a través de tres capítulos: una revisión de la literatura y dos estudios cuantitativos. El capítulo 1 revisa la literatura actual y multidisciplinar sobre estrategia en cuestiones sociales controvertidas. Identifica patrones comunes en la toma de decisiones, los antecedentes de la implicación y las consecuencias de esta en organizaciones empresariales, organizaciones sin ánimo de lucro, grupos de defensa y distintas formas híbridas. El capítulo 2 estudia específicamente la movilización de recursos bajo amenaza en el movimiento provacunas en Estados Unidos. Utilizando datos de panel de organizaciones de movimientos sociales entre 2005 y 2023, muestra que el aumento de la amenaza antivacunas incrementa las contribuciones, pero principalmente en organizaciones especializadas en la cuestión y orientadas al corto plazo. En el capítulo 3, estudio las donaciones a organizaciones de incidencia realizadas por empresas del S&P 500 entre 2018 y 2024. Encuentro que las empresas tienen mayor probabilidad de apoyar causas que coinciden con las preferencias de sus empleados, pero también mayor probabilidad de utilizar donaciones directas de baja visibilidad cuando las organizaciones sin ánimo de lucro receptoras están políticamente desalineadas con su entorno local. En conjunto, esta tesis muestra que la estrategia en cuestiones controvertidas depende de la posición, el conflicto entre audiencias y la estructura de los grupos de interés de la organización. Así, la tesis ofrece un marco amplio para la gestión de cuestiones sociopolíticas a través de distintos tipos de actores. Asimismo, explica en particular cuándo la amenaza redirige el apoyo dentro de una cuestión y el ocultamiento de la filantropía como una estrategia no de mercado diferenciada de las empresas en una sociedad polarizada.

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GENERAL INTRODUCTION

Organizations across sectors now encounter social issues as part of their strategic environment (de Bakker, den Hond, King, & Weber, 2013; Minefee & Yue, 2025; Sun, Doh, Rajwani, Werner, & Luo, 2023). Firms, nonprofits, advocacy groups, entrepreneurial startups and various hybrid organizations, formal or informal, are entering these issue fields with different missions, resources, and accountabilities. Some proactive when it comes to choosing a side; others are rather staged or pulled in as targets, or at least implicated through supply, financing, or platform ties; still others choose to be silent (e.g., Homroy & Gangopadhyay, 2025; McDonnell, King, & Soule, 2015; Zhang, Briscoe, & DesJardine, 2023). Whether to engage, how to engage, and when to engage, with a social issue emerges as a strategic choice with distinct payoff and risk profiles across different organizational forms (Georgallis & Lee, 2020; Mohliver, Crilly, & Kaul, 2023; Odziemkowska, 2022b).

For firms, there might be both normative and instrumental reasons to engage. Rising expectations from regulators, media, and activists make inaction costly (Georgallis & Lee, 2020; King & Soule, 2007; Qin, Luo, Schifeling, & Wang, 2024). Strategic corporate social responsibility (CSR) can actually boost sales, reduce regulatory frictions, and strengthen stakeholder loyalty. Firms “do well by doing good” (Nardi, Zenger, Lazzarini, & Cabral, 2022; Seo, Luo, & Kaul, 2021). Nonprofits and issue advocates, by contrast, might be more mission-driven. In contesting (or defending) an issue, they must select targets, frames, and repertoires with an eye to both resource mobilization, issue progression and

organizational survival (de Bakker, den Hond, & Laamanen, 2017; Gee, Nahm, Yu, & Cannella, 2022; McCarthy & Zald, 1977).

One challenge that is inherent in strategy with social issues, is the fact that they are always value-laden. Some contested issues (such as mandated vaccination, gun rights and racial equity) are outright polarizing; what one stakeholder frames as progress another may frame as loss (Mohliver et al., 2023). Organizations therefore strategize in a field where support and backlash can arise simultaneously. This tension shapes how nonprofits and social enterprises mobilize resources (Boone, Divarçı Çakmaklı, & van Witteloostuijn, 2018; M. D. Werner, Punzi, & Turkenburg, 2023) and how firms invest in CSR initiatives (Bersoff, Sucher, & Tufano, 2024; Bhagwat, Warren, Beck, & Watson, 2020). These dynamics, I argue, is vital for theory and practice, currently under-explored in strategy, and will be a main focus of this dissertation.

I study strategy in and around contested social issues through the following three essays. Chapter 1 reviews the current literature on this very topic, with a particular focus on issue contestant organizations and organizations that are initially uninvolved. Drawing on scholarship in strategy, organization theory, social movement theory, and nonprofit management, it shows that, despite differences in organizational forms and objectives, organizations display common patterns in strategic decision-making, the antecedents of issue engagement and contestation, and the consequences of these activities. By synthesizing research across diverse contexts, organizational types, levels of effectiveness, and relationships within issue arenas, the chapter highlights organizations' agency in both shaping the social construction of their environment and leveraging that

environment to pursue their objectives. It concludes by identifying several clear directions for future research.

Building on this review, Chapter 2 then identifies a specific problem in strategy in contested issue, from an issue contestant's perspective. Specifically, I investigate how threats from an opposing movement shape resource mobilization within a focal movement. I compile a panel of U.S. pro-vaccine social movement organizations (SMOs) for 2005–2023 and examine how their mobilized contributions are affected by threat of the anti-vaccine movement. Rising antivaccine threats generally increase resource inflows to pro-vaccine SMOs, but the gains are unevenly distributed. SMOs that are focal-issue specialists—with immunization central to their scope—receive markedly larger funding increases than generalist organizations. Likewise, SMOs displaying a short-term orientation—prompt deployment of resources toward programmatic action—benefit, whereas long-term-oriented SMOs that accumulate funds for future capacity do not. The findings highlight focal movement adherents' efficacy evaluations under threat—only SMOs expected to directly and immediately counter the threat experience significant resource mobilization.

Chapter 3 considers strategy around contested social issues. U.S. corporations donate either through corporate foundations, which disclose grants on IRS Form 990-PF, or through direct gifts that are typically less visible. This chapter examines whether firms use this channel choice to manage the visibility of advocacy giving. Building on stakeholder theory and nonmarket strategy, I argue that firms are more likely to support advocacy nonprofits aligned with employee preferences but, conditional on giving, more likely to shift support into

lower-visibility direct giving when a recipient is politically misaligned with its local environment. Using advocacy donations by S&P 500 firms from 2018 to 2024, I find support for both expectations. Firms are more likely to donate to recipients ideologically aligned with their workforce and, conditional on donating, more likely to give directly when recipients are politically out of step with their local state context. These patterns are stronger when the recipient is larger and when the firm faces greater social controversy. The findings show that visibility is a strategic dimension of corporate philanthropy and that low-visibility channel choice can help firms sustain contested advocacy giving under conflicting stakeholder demands.

By integrating insights from various theoretical lenses on strategy in and around contested issues, the dissertation clarifies when—and for whom—organizations create genuine social impact.

INTRODUCCIÓN GENERAL

Las organizaciones de distintos sectores se enfrentan hoy a cuestiones sociales como parte de su entorno estratégico (de Bakker, den Hond, King, & Weber, 2013; Minefee & Yue, 2025; Sun, Doh, Rajwani, Werner, & Luo, 2023). Empresas, organizaciones sin ánimo de lucro, grupos de defensa, startups emprendedoras y diversas organizaciones híbridas, formales o informales, entran en estos campos de cuestiones con misiones, recursos y responsabilidades diferentes. Algunas son proactivas a la hora de tomar partido; otras son más bien situadas o arrastradas a ellos como objetivos, o al menos quedan implicadas a través de vínculos de suministro, financiación o plataforma; otras, en cambio, optan por guardar silencio (e.g., Homroy & Gangopadhyay, 2025; McDonnell, King, & Soule, 2015; Zhang, Briscoe, & DesJardine, 2023). La decisión de implicarse o no, cómo implicarse y cuándo hacerlo respecto de una cuestión social surge como una elección estratégica con perfiles diferenciados de beneficios y riesgos entre distintas formas organizativas (Georgallis & Lee, 2020; Mohliver, Crilly, & Kaul, 2023; Odziemkowska, 2022b).

En el caso de las empresas, puede haber razones tanto normativas como instrumentales para implicarse. El aumento de las expectativas por parte de reguladores, medios de comunicación y activistas hace que la inacción resulte costosa (Georgallis & Lee, 2020; King & Soule, 2007; Qin, Luo, Schifeling, & Wang, 2024). La responsabilidad social corporativa (RSC) estratégica puede, de hecho, aumentar las ventas, reducir fricciones regulatorias y fortalecer la lealtad de los grupos de interés. Las empresas pueden “hacerlo bien haciendo el bien” (Nardi, Zenger, Lazzarini, & Cabral, 2022; Seo, Luo, & Kaul, 2021). Las

organizaciones sin ánimo de lucro y los grupos promotores de causas, por el contrario, pueden estar más guiados por su misión. Al contestar o defender una cuestión, deben seleccionar objetivos, marcos interpretativos y repertorios de acción teniendo en cuenta tanto la movilización de recursos como el avance de la cuestión y la supervivencia organizativa (de Bakker, den Hond, & Laamanen, 2017; Gee, Nahm, Yu, & Cannella, 2022; McCarthy & Zald, 1977).

Un desafío inherente a la estrategia en cuestiones sociales es que estas siempre están cargadas de valores. Algunas cuestiones controvertidas, como la vacunación obligatoria, el derecho a portar armas o la equidad racial, son claramente polarizadoras; lo que un grupo de interés interpreta como progreso, otro puede interpretarlo como pérdida (Mohliver et al., 2023). Las organizaciones, por tanto, elaboran sus estrategias en un campo en el que el apoyo y la reacción adversa pueden surgir al mismo tiempo. Esta tensión moldea la forma en que las organizaciones sin ánimo de lucro y las empresas sociales movilizan recursos (Boone, Divarçı Çakmaklı, & van Witteloostuijn, 2018; M. D. Werner, Punzi, & Turkenburg, 2023) y la forma en que las empresas invierten en iniciativas de RSC (Bersoff, Sucher, & Tufano, 2024; Bhagwat, Warren, Beck, & Watson, 2020). Sostengo que estas dinámicas son importantes tanto para la teoría como para la práctica, siguen estando poco exploradas en estrategia y constituirán un eje central de esta tesis.

Estudio la estrategia dentro y en torno a cuestiones sociales controvertidas a través de los tres ensayos siguientes. El capítulo 1 revisa la literatura actual precisamente sobre este tema, con especial atención a las organizaciones contendientes en la cuestión y a las organizaciones que inicialmente no están

implicadas. Basándose en trabajos de estrategia, teoría de la organización, teoría de movimientos sociales y gestión de organizaciones sin ánimo de lucro, muestra que, pese a las diferencias en formas organizativas y objetivos, las organizaciones presentan patrones comunes en la toma de decisiones estratégicas, en los antecedentes de la implicación y la contestación de cuestiones, y en las consecuencias de estas actividades. Al sintetizar investigación procedente de contextos diversos, distintos tipos de organización, diferentes niveles de efectividad y distintas relaciones dentro de las arenas de una cuestión, el capítulo pone de relieve la capacidad de agencia de las organizaciones tanto para moldear la construcción social de su entorno como para aprovechar ese entorno en la persecución de sus objetivos. El capítulo concluye identificando varias direcciones claras para futuras investigaciones.

A partir de esta revisión, el Capítulo 2 identifica un problema específico de la estrategia en cuestiones controvertidas desde la perspectiva de un contendiente en la cuestión. En concreto, investigo cómo las amenazas procedentes de un movimiento opositor moldean la movilización de recursos dentro de un movimiento focal. Compilo un panel de organizaciones del movimiento social provacunas en Estados Unidos (SMOs) para el periodo 2005–2023 y examino cómo sus contribuciones movilizadas se ven afectadas por la amenaza del movimiento antivacunas. El aumento de la amenaza antivacunas incrementa en general los flujos de recursos hacia las SMOs provacunas, pero esos beneficios se distribuyen de manera desigual. Las SMOs especializadas en la cuestión focal —aquellas para las que la inmunización ocupa un lugar central en su ámbito de actuación— reciben incrementos de financiación significativamente mayores que

las organizaciones generalistas. Del mismo modo, se benefician las SMOs con orientación de corto plazo —esto es, con despliegue rápido de recursos hacia la acción programática—, mientras que las SMOs orientadas al largo plazo, que acumulan fondos para desarrollar capacidades futuras, no lo hacen. Los hallazgos destacan las evaluaciones de eficacia de los adherentes del movimiento focal bajo amenaza: solo aquellas SMOs que se espera que contrarresten la amenaza de manera directa e inmediata experimentan una movilización significativa de recursos.

El Capítulo 3 examina la estrategia en torno a cuestiones sociales controvertidas. Las corporaciones estadounidenses donan bien a través de fundaciones corporativas, que divulgan sus subvenciones en el formulario 990-PF del IRS, bien mediante donaciones directas, que suelen ser menos visibles. Este capítulo analiza si las empresas utilizan esa elección del canal para gestionar la visibilidad de sus donaciones a organizaciones de incidencia pública. Basándome en la teoría de los grupos de interés y en la estrategia no de mercado, sostengo que las empresas tienen mayor probabilidad de apoyar a organizaciones de incidencia alineadas con las preferencias de sus empleados, pero que, condicionadas a donar, tienen mayor probabilidad de desplazar ese apoyo hacia donaciones directas de menor visibilidad cuando el receptor está políticamente desalineado con su entorno local. Utilizando datos de donaciones a organizaciones de incidencia realizadas por empresas del S&P 500 entre 2018 y 2024, encuentro apoyo para ambas expectativas. Las empresas tienen mayor probabilidad de donar a receptores ideológicamente alineados con su fuerza laboral y, condicionadas a donar, mayor probabilidad de hacerlo de forma directa

cuando los receptores están políticamente desfasados respecto al contexto político de su estado. Estos patrones son más fuertes cuando el receptor es de mayor tamaño y cuando la empresa afronta una mayor controversia social. Los hallazgos muestran que la visibilidad es una dimensión estratégica de la filantropía corporativa y que la elección de canales de baja visibilidad puede ayudar a las empresas a sostener donaciones controvertidas a organizaciones de incidencia bajo demandas conflictivas de los grupos de interés.

Al integrar perspectivas procedentes de diversas lentes teóricas sobre la estrategia dentro y en torno a cuestiones controvertidas, esta tesis aclara cuándo —y para quién— las organizaciones generan un impacto social genuino.

CHPATER 1. THE LITERATURE ON STRATEGY IN AND AROUND CONTESTED SOCIAL ISSUES

Introduction

To understand how organizations navigate contested social issues, I begin with an interdisciplinary review of the literature. Research on this topic is spread across several conversations that do not line up neatly. Work on collective action helps explain why mobilization happens, but it is usually less concerned with why some organizations do better than others over time (Kornberger et al., 2025). Organization studies, especially strategic management, have mostly centered on firms and often treat civil-society actors as outside challengers or “secondary stakeholders” pressing targeted companies (Briscoe & Gupta, 2016; Clarkson, 1995; Soule, 2012). At the same time, work on nonprofits treats strategy in its own sector-specific way (Gee et al., 2022). The result is a fragmented literature: there are many useful pieces, but no clear organizational-level account of strategy in contested issue arenas.

Synthesis is also difficult because these literatures do not share a single view of what the strategy is supposed to achieve. For mission-driven organizations, performance may mean resource mobilization, constituency building, local mission delivery, or broader field-level change, including cultural influence, legitimacy, policy change, and other formal institutional transformation (Gamson, 2006; McCarthy & Zald, 1977; Steil & Vasi, 2014). For profit-driven organizations, by contrast, strategy is more often judged in terms of rents, shareholder value, or at least stakeholder value, some kind of social evaluation, even when action on contested issues has wider social implications. What counts as success varies

by organizational form and by the outcome under consideration. Mechanisms such as framing, organization, disruption, and political mediation therefore might not work the same way across forms (Amenta, Carruthers, & Zylan, 1992; Cress & Snow, 2000).

In this review, I respond to that problem with a systematic, cross-disciplinary look at strategy in and around contested social issues. The goal is to map how different strands of research define performance, what kinds of consequences they focus on, and how those choices shape the strategies they can see and explain, so as to link different silos into a more general and multi-actor account of strategy in contested issue fields (King & Jasper, 2022).

Organizing Framework and Scope

To organize the review, I sort organizations by their position in relation to a contested social issue. Figure 1.1 distinguishes three positions. First, organizations can act as issue contestants. These are actors that advocate a particular institutional change. They may do so as lead challengers or as supportive members of a broader coalition pushing in the same direction. Second, organizations can be directly targeted in the contestation, either because their products, practices, identity, ownership, or affiliations are “the problem”, or they are materially implicated as “part of the problem” through supply chains, financing, common platforms, alliances, and endorsements (Hudson, 2008). Third, organizations can stand around the issue. These organizations are not directly related, or the issue does not primarily concern them, but they may still choose to speak, act, collaborate, “counter-position”, or stay silent in ways that matter strategically (Mohliver et al., 2023).

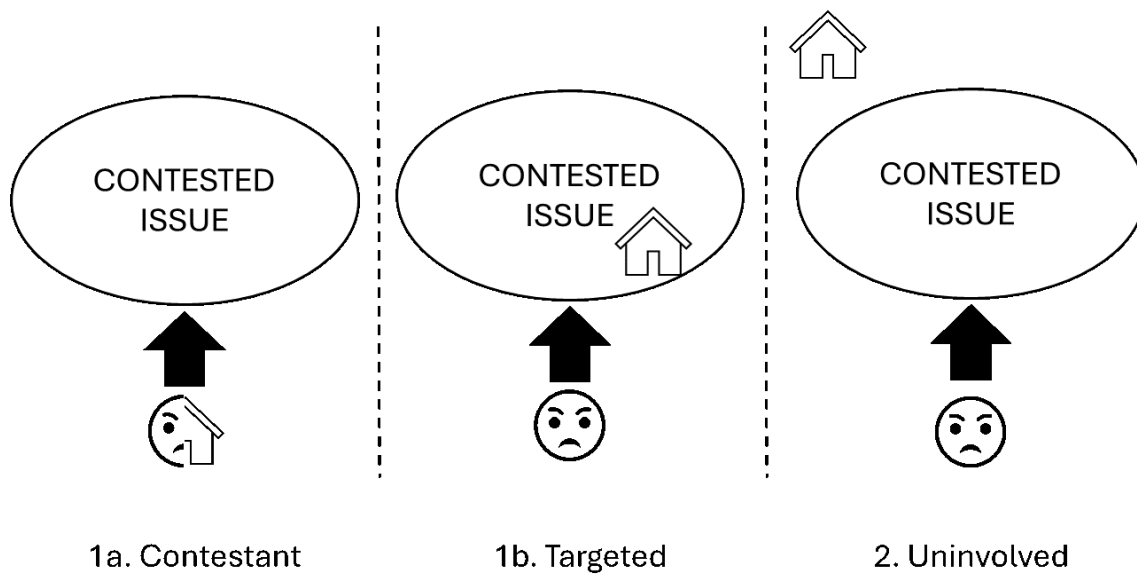


Figure 1.1. Framework for Strategy in and Around Contested Social Issues

Notes: The issue contestant is represented by an upset face, and the focal organization is represented by a house. The focal organization may be (1a) contesting an issue, (1b) targeted by or materially implicated in a contestation, or (2) originally not directly involved.

This framework helps connect literatures that are usually kept apart. In social movement studies, strategy is usually decomposed into activists' demands, their frames for communicating those demands, targets, venues and sites of contention, and the specific course of action (Kudesia, 2021; Leitzinger & Waeger, 2023; McCarthy & Zald, 1977). Formal organization is not always central to the explanation. The field of strategy is traditionally firm-centered. It examines firms as targets or responders, albeit having selectively drawing on movement concepts such as private and public politics (Reid & Toffel, 2009), political opportunity structures (Briscoe, Chin, & Hambrick, 2014), and framing (Giorgi, 2017). Nonprofit strategy is an emerging field (Gee et al., 2022), but it does not treat contested social issues as a general strategic setting, although it touches on topics such as philanthropy (Bekkers & Wiepking, 2011), hybrid forms (Debra C. Minkoff, 2002), collaboration (Austin, 2000), and advocacy (Grønbjerg & Prakash, 2017). By organizing the review around positions in the issue arena, I

can place firms, nonprofits, SMOs, and hybrids in the same analytical frame and compare common problems such as target selection, frame choice, coalition building, engagement intensity, and voice versus exit.

Z. Wu and Liu (2024) have recently reviewed how firms respond when they are direct targets of social activism, which theoretically and empirically overlaps with the second (targeted) position in the framework (see also Briscoe & Gupta, 2016). I therefore do not formally review target responses here. Instead, the review focuses on two positions: organizations acting as issue contestants, and organizations that are not directly involved but operate around the issue (see Figure 1.1). Where applicable, insights are directly drawn from Z. Wu and Liu (2024) and Briscoe and Gupta (2016).

Strategy around contested issues deserves special attention. When an organization is not directly implicated, it can of course remain a bystander, and even that may be strategic (Carlos & Lewis, 2018; Georgallis & Lee, 2020; Mohliver et al., 2023). But the more interesting question is why apparently peripheral actors get involved at all, why some do so earlier or more forcefully than others, and what they stand to gain or lose by taking a stance on a contested issue. Taken together, issue contestants, direct targets, and around-the-issue organizations describe the main ways formal organizations relate to contested social issues. This chapter uses this broader map but concentrates on the two positions that are least well integrated in existing reviews.

Review Sample and Analysis

To build the sample, I followed prior review work in using a structured search process and limited the search to top journals ranked 4 or 4* in the Academic

Journal Guide (Kunisch, Denyer, Bartunek, Menz, & Cardinal, 2022). I searched Web of Science using three intersecting blocks: contestation or contestedness, organizational actor, and strategy, decision, or performance. For issue contestedness, I follow Mohliver et al. (2023, pp. 1201-1202) in treating it as a matter of agreement: the extent to which views on an issue are similar or dissimilar across the relevant population. The full query is reported in Appendix A. This initial search returned 382 papers from 14 journals, published through 2025.

I then read all abstracts and excluded papers for one or more of three reasons. First, some papers were not actually about social issues, even if they used words like “contentious” or “contested.” Second, some papers dealt with social issues but not with genuine issue contestation; many papers on general CSR or stakeholder management fell into this group. Third, some papers had little to do with the strategic management of organizations. These included work focused mainly on consumer or employee psychology, frame resonance by itself, or the macro-level emergence of social issues. I also do not treat the state as a focal organization in this review. After this screening, 183 papers remained within scope: 133 on organizations in contested issues, 32 on organizations around contested issues, and 18 that touched on both.

Within the papers on organizations in contested issues, I then separated studies that are mainly about organizations as issue contestants from those that are mainly about organizations as contestation targets. Although papers in this area often mention both sides, 77 papers are more clearly written from the contestants’ perspective and 56 from the targets’ perspective. The target-focused

set overlaps substantially with Wu and Liu’s (2024) review of corporate responses to social activism. I therefore retain the 77 contestant-focused papers and combine them with the 50 papers that examine organizations around contested issues, including the 18 that touch on both. This produces a final review sample of 127 papers from 14 journals¹ published between 1980 and 2025. Figure 1.2 plots the time trend. One notable pattern is that, while research on organizations in contested issues has a longer history, work on strategy around contested issues is much newer.

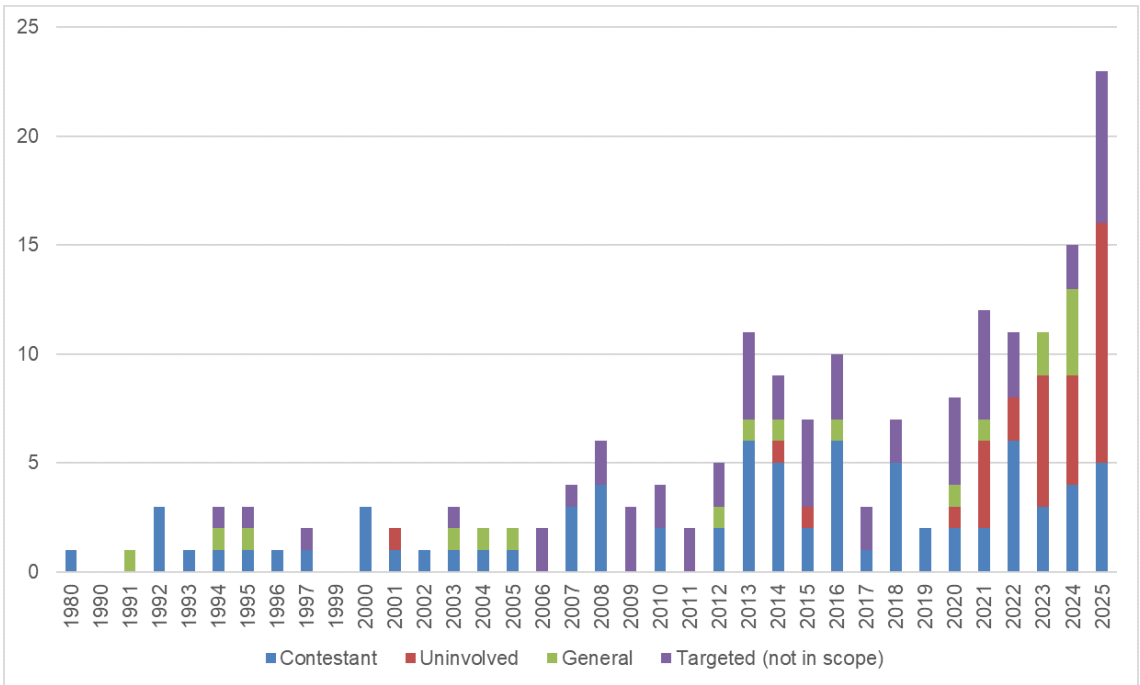


Figure 1.2. Distribution of Papers Over Time

In analyzing the sample, I focus on a basic strategic question: when and why do some organizations perform better than others over time in relation to a contested social issue? To answer this, I track the strategic choices organizations

¹ The journals are *Academy of Management Journal*, *Academy of Management Review*, *Administrative Science Quarterly*, *American Journal of Sociology*, *American Sociological Review*, *Human Relations*, *Journal of International Business Studies*, *Journal of Management*, *Journal of Management Studies*, *Management Science*, *Organization Science*, *Organization Studies*, *Public Administration Review*, and *Strategic Management Journal*.

make, the decision processes behind those choices, the conditions that shape them, and their reported consequences. I also note where government policy affects these processes or outcomes. For papers on organizations around contested issues, I additionally ask how organizations become involved in the first place, what keeps them involved, and whether their relationship to the issue changes over time.

The sections that follow present the main findings for the two focal positions in this review: organizations acting as issue contestants and organizations operating around contested social issues without being direct targets. I then turn to a set of promising directions for future research that can deepen our understanding of strategy in contested issue arenas.

Organizations as Issue Contestants

Strategy in contested social issues as issue contestants is shaped by political openings, resource ties, organizational form, and movement relationships. Those choices, in turn, can affect outcomes from local survival, legitimacy to policy change and field-level reordering (see Table 1.1 for an overview).

Table 1.1. Strategy of Contestant in Social Issue

Strategic Choices	Antecedents	Consequences and Outcomes
Framing and legitimation strategies	Political opportunities and exogenous shocks	Organizational performance and survival
Information and media strategies	Stakeholder demands and resource dependencies	Legitimacy and reputation
Tactical repertoires and adaptation	Organizational characteristics and history	Policy and field-level outcomes
• Insider vs. outsider tactics		
Organizational form and structure choices	Network position and relationships	Embedded contestation and

Entrepreneurial entry and
venture creation
Coalition-building and
collaboration
Diversification and
boundary-crossing

Strategic Choices

Framing and legitimation strategies. Issue contestants use framing to define what the issue is, why it matters, and why their position is legitimate. They often draw on deeper cultural themes and align their claims with the discursive opportunities available in the wider environment (Creed, Scully, & Austin, 2002; Giorgi, 2017; McCammon, Muse, Newman, & Terrell, 2007). Framing is therefore not only persuasive language but also fitting claims to a specific political and cultural setting.

The framing itself changes with context. When access to policymakers is relatively open, contestants are more likely to stress similarity to the mainstream. When access is blocked, they are more likely to stress difference and use identity to criticize dominant norms (Bernstein, 1997). In more commercial settings, organizations also broker frames across different audiences, using some activist language but adjusting it to markets and partners (Lee, Ramus, & Vaccaro, 2018).

Legitimation involves more than just framing. Organizations can pair disruptive or nonconforming action with conventional symbols of responsibility and deservingness, or use category blending and visible compliance markers to seem more acceptable to skeptical audiences (Elsbach & Sutton, 1992; Lichtenstein, 2022).

Information and media strategies. Relatedly, issue contestants fight over the kind of information that is available to the public regarding the issue (MacKay & Munro, 2012). Through information and media strategies, organizations shape who is credible, what counts as evidence, and who “the bad guys” are.

Media attention matters because it amplifies activist pressure. McDonnell and Werner (2016), for example, show that protests with wider media coverage are more likely to disrupt corporate political activity. Digital tools intensify these dynamics (Jarvis, Goodrick, & Hudson, 2026). Internet petitions can spread reputational threats quickly (Leonel, Rehbein, Westermann-Behaylo, & Perrault, 2023). And social media render contesting messages more visible, interactive, editable, and targetable across audiences (M. S. Wang & Tracey, 2024).

Tactical repertoires and adaptation. Issue contestants rarely rely on one tactic. They can combine for example protest and disruption with more cooperative moves such as dialogue, partnership, and donor engagement (McDonnell, Odziemkowska, & Pontikes, 2021; Odziemkowska, 2022b). And they adjust that mix as threats and opportunities change. McCammon et al. (2008) coined the term “strategic adaptation,” which involves reading environmental signals, reassessing current tactics, and changing course when needed. Organizations that strategically adapt can move reform more quickly. Peripheral actors can gain influence when conditions are favorable (Stevenson & Greenberg, 2016). Issue contestants can also learn from others in a network, especially when they are themselves centrally positioned and already share some repertoires with network partners (D. J. Wang & Soule, 2012).

Insider vs. outsider tactics. A recurring choice in this repertoire of strategy is the choice of contestation through established channels or through extra-institutional (or outsider) channels (Dixon, 2008; Staggenborg, 1988). Insider tactics include lobbying, petitioning, negotiation, and participation in formal rulemaking. Outsider tactics include protest, boycott, disruption, and media pressure. The choice will depend on institutional access, resources, and tolerance for risk.

Outsider tactics create public pressure and can impose direct costs on targets (King & Soule, 2007). But in constrained political settings, that pressure can also invite sanctions. In authoritarian China, for example, NGOs have to combine insider work with public opinion shaping and occasional disruptive tactics, while managing risk through government ties and peer networks (Li, Lo, & Tang, 2016; Marquis & Bird, 2018; Zhan & Tang, 2016). In private regulation settings, Mena and Waeger (2014) find that tactical choice also depends on how open and enforceable the governance arrangement is and whether the group is more radical or reformist in orientation.

Organizational form and structure choices. Organizations also make strategic choices about their form, affiliation, and structural position, in contesting a social issue. Hybrid organizations that span multiple movements, for example, can act as brokers and recruit across movement boundaries (Heaney & Rojas, 2014). Social enterprises will place a contested issue directly at the center of a venture and make it part of the business model (M. D. Werner et al., 2023).

The legal form and funding mix of an organization will influence whether advocacy is likely and how radical it can be. For social enterprises, for-profit form

tends to be associated with less policy advocacy, whereas collaboration and government income can support more active engagement (Mair & Rathert, 2024). Formalization and national affiliation can also help with legitimacy and resources, but they may reduce local autonomy and dampen local agency (McCarthy & Wolfson, 1996; Staggenborg, 1988; Walker & McCarthy, 2010).

Entrepreneurial entry and venture creation. Notably, some issue contestants create new ventures, practices, or markets around the contested issue (e.g., M. D. Werner et al., 2023). In this part of the literature, the strategic task is to turn contestation into a viable organizational project.

Institutional entrepreneurs do this by occupying credible subject positions, theorizing new practices, and connecting those practices to routines that others already recognize (S. Maguire, Hardy, & Lawrence, 2004). In other instances, activism cultivates entrepreneurship perhaps more directly. In the Fairphone case written by Akemu, Whiteman, and Kennedy (2016), a campaign around conflict minerals gradually accumulated legitimacy, partners, and resources, which made venture creation possible. Entry into moral markets does require careful sequencing, however (Hedberg & Lounsbury, 2021). Organizations may initially separate their moral commitments and operational routines, but then tie them together once the infrastructure and legitimacy are in place.

Coalition-building and collaboration. Coalitions help individual organizations overcome weak institutional access, resources, and strong opposition (Staggenborg, 1986; Stevenson & Greenberg, 2016). But coalition effectiveness depends on the fit rather than how big the coalition is. Coalitions are most effective when they combine complementary resources, constituencies,

experience, and local access (Heaney & Rojas, 2014; Slager, Chuah, Gond, Furnari, & Homanen, 2023).

Cross-sector collaboration is harder than it might seem. Partnerships with firms may create opportunities for issue progress, but they can also threaten an SMO's standing with its supporters and peers (Austin, 2000; Odziemkowska, 2022b). Boundary organizations and hybrid forms can make these collaborations more durable by managing differences in control, membership, and ownership (O'Mahony & Bechky, 2008; York, Hargrave, & Pacheco, 2016). Such ties have been shown to create leverage through supply chains (Liu & Heugens, 2023).

Diversification and boundary-crossing. Relatedly, issue contestants also decide whether to stay within one issue lane or move across issue boundaries. Strong movement boundaries make diversification harder, but some organizations still cross into adjacent causes when those claims look legitimate and strategically useful (D. J. Wang, Piazza, & Soule, 2018; D. J. Wang, Rao, & Soule, 2019).

This creates a classic trade-off. Diversification can broaden support and bring in new resources, but it can also blur identity and create internal tension for the organization. Challengers therefore often have to balance expansion and purity rather than pick one once and for all, as the B Corp movement shows (Kim & Schifeling, 2022).

Antecedents of Strategic Choices

Political opportunities and exogenous shocks. This is one of the clearest antecedents of any strategic choice. Political process theory argues that the effects of collective action depend on the surrounding opportunity structure,

including party alignments, institutional openings, and the broader regime environment (Amenta et al., 1992; Meyer & Staggenborg, 1996).

My review speaks to this paradigm, but in a more organization-centered way. Favorable access makes insider influence more workable. More closed or fragmented political environments push contestants toward coalition-building, disguise, or mixed strategies (Lichtenstein, 2022; Neuberger, Kroezen, & Tracey, 2023; Stevenson & Greenberg, 2016). In responsive authoritarian systems, Marquis and Bird (2018) find visibility to be a strategic variable as some forms of engagement are tolerated while others will trigger harsh penalties. Exogenous shocks can scramble the whole landscape. Industry crises, for example, can quickly redistribute legitimacy and resources across tactical camps of SMOs (McDonnell et al., 2021).

Stakeholder demands and resource dependencies. Issue contestants do not choose from an unlimited set of tactics. Their funders, allies, and audiences shape what is feasible and what is risky (Jenkins & Eckert, 1986). Government funding can support advocacy while also increasing dependence on bureaucratic systems (Li et al., 2016). Foundation funding often steers organizations toward safer or more programmatic work. Peer collaboration, by contrast, can increase capacity and make advocacy easier to sustain.

Resource dependencies also shape how radical or moderate an organization can be. Cross-sector ties may create strategic leverage, especially where state enforcement is weak (Austin, 2000; Liu & Heugens, 2023). More ideologically homogeneous supporter bases make it easier to pursue sharper, more contra-

institutional tactics, whereas more mixed supporter bases often reward moderation or strategic blending (Yaziji & Doh, 2013).

Organizational characteristics and history. Smaller and younger organizations face sharper survival risks and often need clearer niches and stronger community ties to persist (Edwards & Marullo, 1995; Walker & McCarthy, 2010). Leadership biographies, constituency ties, and internal deliberation affect whether organizations can read situations well and develop effective responses (Ganz, 2000).

History matters as well. Prior dealings with targets, authorities, or allied groups create path dependencies that shape later choices. For example, prior relationships with firms can change whether future appeals are persuasive and whether pressure is needed at all (Durand & Georgallis, 2018; Waldron, Navis, Karam, & Markman, 2020).

Network position and relationships. Network position affects both influence and learning. Central actors often have more reach, but peripheral actors can still matter when they exploit the right openings or cultivate the right ties (Stevenson & Greenberg, 2016). As mentioned, networks are also channels where tactics and know-how can travel across organizations (D. J. Wang & Soule, 2012). In general, issue contestation often unfolds through webs of embedded activists and interorganizational ties rather than through isolated organizations (DeJordy, Scully, Ventresca, & Creed, 2020). These relationships help sustain reform efforts across organizational boundaries and over time.

Consequences and Outcomes

Organizational performance and survival. Research with an ecological tradition is interested in survival (Soule & King, 2008; Walker & McCarthy, 2010). Otherwise, organizational performance in this literature frequently means mobilizing labor, money, members, and attention over time (McCarthy & Zald, 1977). Internal structure, local support, and national affiliation all matter here, but their effects vary by organizational scale and issue niche (Edwards & Marullo, 1995; McCarthy & Wolfson, 1996; Walker & McCarthy, 2010).

Legitimacy and reputation. Strategic choices also affect whether contestants are seen as credible, authentic, and deserving. As mentioned, legitimacy can come from embracing stigma, using careful disguise, or pairing disruptive action with recognizable signs of conformity (Elsbach & Sutton, 1992; Neuberger et al., 2023; M. D. Werner et al., 2023). Critical events can shift these legitimacy judgments across organizations, rewarding some tactical positions while penalizing others (McDonnell et al., 2021).

Policy and field-level outcomes. Perhaps peculiar to strategy in and around social issues, issue-contesting strategies very commonly can reshape firms, markets, and public rules. Activism can raise the cost of certain corporate behaviors, disrupt political access, and alter firm commitment to contested industries (Durand & Georgallis, 2018; King & Soule, 2007; McDonnell & Werner, 2016). Nevertheless, policy change is more likely when contestants adapt strategically and connect mobilization to implementation arenas rather than stopping at formal enactment (Andrews, 2001; McCammon et al., 2008).

These effects can accumulate into broader field-level change. Challenger influence may travel through diverse organizational ecologies and new

governance arrangements, from local lesbian and gay rights coalitions, conflict minerals governance to the Bangladesh Accord, for example (Negro, Perretti, & Carroll, 2013; Reinecke & Ansari, 2015; Reinecke & Donaghey, 2025).

Embedded contestation and internal organizational change. Not all issue contestants work from outside. Some operate from within the organizations they seek to change (Heucher, Alt, Soderstrom, Scully, & Glavas, 2024). In those cases, the outcome is internal transformation: new practices, new roles, and new structures.

Internal activist groups and outside movement support can jointly push organizations to adopt new practices (Chuang, Church, & Hu, 2016). Embedded activists can also translate broader movement goals into workable internal reforms, although those gains may later be absorbed, repurposed, or thinned out by the host organization itself (Augustine, Hedberg, Choi, & Lounsbury, 2024; Schifeling & Soderstrom, 2022).

Synthesis

Context-dependent strategy selection. This literature does not support a single best strategy for issue contestants. What works depends on regime type, issue visibility, political opportunities, and timing. Contestants shift, for example, between similarity and difference, insider and outsider pressure, and moral versus market language as conditions change (Bernstein, 1997; Dixon, 2008; Hedberg & Lounsbury, 2021; Mena & Waeger, 2014; Neuberger et al., 2023).

Organization-level moderators of strategic effectiveness. The same tactic can work very differently depending on the organization using it. Form, funding, leadership, history, and tactical capacity all shape what an organization can

credibly do and what it gets back from doing it (Ganz, 2000; Mair & Rathert, 2024; M. D. Werner et al., 2023; Yaziji & Doh, 2013). The relationship between strategy and performance is therefore filtered through organizational make-up rather than applied on a blank slate.

Movement-level interdependence. Issue contestants rarely act alone. Their strategies must be understood within a wide movement ecology made up of radicals and moderates, local and national groups, hybrids, brokers, and collaborators (Heaney & Rojas, 2014; Staggenborg, 1986; D. J. Wang et al., 2018; D. J. Wang & Soule, 2012). Division of labor across these positions is often part of how progress happens. Coalition fit and boundary-spanning often matter as much as any single tactic (Slager et al., 2023).

The constitutive power of issue contestation. Issue contestants actively construct their issue environments. Through framing, media work, boundary crossing, and audience targeting, they shape what the issue means, who feels implicated, and how polarized the arena becomes (Bernstein, 1997; Giorgi, 2017; Jarvis et al., 2026; M. S. Wang & Tracey, 2024). Therefore, strategy in contested social issues is partly constitutive: organizations are not only choosing within a field, they are also remaking the field they are contesting.

Taken together, the literature points to a view of issue-contesting strategy as contingent, relational, and field-shaping. Organizations choose under constraints they do not control, but they also help set the terms of contestation through the meanings they push, the alliances they build, and the institutional arrangements they leave behind.

Organizations Around Contested Social Issues

Studying organizations engaging with contested social issues from an originally uninvolved position, the literature has accumulated insights into the conditions under which engagement, restraint, or selective positioning is most defensible and most effective (see Table 1.2 for an overview). Organizations perform better when they calibrate their engagement to the issue's settlement status, their internal ideological alignment, and their audience composition. Before issues are settled, cautious economic framing or explicit neutrality tends to be more defensible; afterward, advocacy becomes easier to justify. Substantive action generally outperforms symbolic signaling. Throughout, government policy acts as both an enabler and a constraint on the timing and credibility of organizational positioning.

Table 1.2. Strategy Around Contested Social Issue

Modes of Organizational Engagement	Pathways of Indirect Involvement	Antecedents and Contingencies	Consequences
Silence	Geographic proximity and community embeddedness	With-firm ideological alignment	Exposure and disruption effects
Public positioning and symbolic engagement	Stakeholder pressure	Issue attributes	Stakeholder responses and social evaluation
Substantive organizational action	Supply chain and business ties	Institutional and regulatory context	Internal adaptation and organizational change
	Reputation spillovers and field-level expectations	Competitive dynamics	
		Dynamics and triggers of engagement	

Modes of Organizational Engagement

Generally there are three engagement modes. **Silence** is an option but not always neutral. Firms that did not participate in Blackout Tuesday suffered measurable stakeholder penalties, especially when peer firms were active (Qin et al., 2024). Communicating an explicit apolitical stance may be preferable to silence when opinion is symmetrically divided, as it signals intentional neutrality rather than indifference (Bondi, Burbano, & Dell'Acqua, 2025).

Public positioning and symbolic engagement is the most commonly studied mode (Mohliver et al., 2023; Westphal, 2023). CEO lip service is shaped by personal values but is more likely when leaders expect stakeholder alignment or tolerance (Hambrick & Wowak, 2021). Before legal settlement of an issue, firms tend to justify stances in narrower, firm-centered terms; afterward, they frame engagement as part of broader societal change (Chung, Odziemkowska, & Piazza, 2025).

Countervailing claims represent a defensive variant. Charlottesville employers used pro-diversity language in job postings to counter stigma by association (Hurst, 2023). Firms tied to Taiwan's KMT regime increased philanthropy after the Sunflower Movement to hedge against democratic transition risks (Cai, Yue, Lin, Yan, & Yang, 2025). Because one firm's symbolic stance can create an opening for a rival to take the opposite position, such engagement has also been studied as a competitive strategy (Mohliver et al., 2023; Seo, 2025).

Substantive organizational action goes beyond rhetoric. For example, non-target firms in Japan's emissions debate developed products aligned with environmental values, gaining competitive advantages over primary targets (Shu

& Lewin, 2024). Corporate boards responded to Women's March protests by appointing female directors (Zhang et al., 2023).

Pathways of Indirect Involvement

Organizations become entangled with contested social issues through multiple indirect pathways. ***Geographic proximity and community embeddedness*** are frequently cited. For example, Charlottesville employers faced stigma simply from being headquartered near the Unite the Right rally (Hurst, 2023), entrepreneurs in Togo suffered roughly 20% profit losses from proximity to violent protests (Dimitriadis, 2021), and Women's March protest scale in local communities prompted female director appointments at nearby firms (Zhang et al., 2023).

Stakeholder pressure is another common pathway. Employees' ideological preferences can push CEOs into activism that departs from their own values (Wowak & Busenbark, 2024), competitors' activism can create windows for the focal firm's counter-positioning (Seo, 2025), and consumer expectations penalize silence (Qin et al., 2024). Firms that stayed quiet during Blackout Tuesday saw a 33% slowdown in follower growth and a 12% drop in post likes. Firms facing legitimacy challenges from shareholder activism increased emphasis on material social issues, while those facing social disapproval shifted toward immaterial issues to restore moral capital (W. Wu, Wang, Tong, & Zhang, 2025).

Supply chain and business ties also draw firms in. Chinese firms doing business with Japan were pressured by the 2012 anti-Japanese movement to reduce trade and FDI, even though they were not direct targets (L. Tian, Tse, Xiang, Li, & Pan, 2021). Multinational firms in Burma faced divestment pressures

shaped by their home countries' political characteristics and intergovernmental centrality (Soule, Swaminathan, & Tihanyi, 2013).

Reputation spillovers and field-level expectations operate more diffusely (Zietsma, Groenewegen, Logue, & Hinings, 2017). Organizations observe what happens to peers and adjust accordingly (Z. Wu & Liu, 2024). Briscoe, Gupta, and Anner (2015), for example, show that non-targeted universities learned from peer decisions to terminate licensing with Russell Athletic, nevertheless adoptions driven by evidence-based activism were more persuasive than those driven by disruptive protest. Transnationally, NGOs have reshaped the global institutional field such that firms must now account for civil society activities that alter regulatory environments, public perceptions, and market conditions (Teegen, Doh, & Vachani, 2004).

Antecedents and Contingencies of Engagement

Within-firm ideological alignment is among the strongest predictors. Firms whose leaders and employees share progressive values are more likely to participate in progressive activism (McKean & King, 2024). Conservative CEOs may engage in “begrudging activism” when organizational ideology is liberal (Wowak & Busenbark, 2024), and firms with ideologically homogeneous workforces are especially responsive to competitors' opposing activism (Seo, 2025).

Issue attributes shape responses. According to Mohliver et al. (2023), the interplay of issue salience and agreement predicts four equilibrium outcomes: social indifference, niche CSR, counterpositioning, and universal CSR. Melloni, Patacconi, and Vikander (2023) similarly argue that credible CEO activism is

more likely when polarization is high, when consumers actually care about sociopolitical positioning, and when broad mass-market strategies are deemed unprofitable. Therefore, the profitability and credibility of taking a stand depend on how much positioning matters to audiences and how costly it is for firms to differentiate on that basis (Lyon & Maxwell, 2025).

Institutional and regulatory context conditions strategic choices in at least three ways. Policy can act as an antecedent by signaling which positions have become legitimate (Chung et al., 2025). It can act as a constraint when politicians retaliate against activist firms or political structures shield firms from movement pressures (Poliquin & Hou, 2025; Wowak & Busenbark, 2024). Finally, policy can act as a moderator when state-level polarization affects legitimacy judgments (Hadani, 2024). Broader political opportunity structures also condition whether protests generate positive spillovers for uninvolved organizations (Xu, Wang, Hiatt, & Park, 2026).

Competitive dynamics matter too. Firms may engage because competitors already have, because silence becomes harder to sustain once rivals act, or because issue engagement offers strategic differentiation (Mohliver et al., 2023; Seo, 2025).

Dynamics and triggers of engagement. Notably, organizations' relationships to contested issues are not static. Fortune 500 firms shifted from individual to collective action frames on LGBTQ issues only after same-sex marriage was legalized in their home states (Chung et al., 2025). Nike moved from avoiding controversy to courting it as consumer polarization intensified (Melloni et al., 2023). Key triggers include what I have mentioned above, i.e., reputational

threats from stigma by association (Hurst, 2023), stakeholder pressure from employees, consumers, and investors (Mkrtchyan, Sandvik, & Zhu, 2024; Wowak & Busenbark, 2024), competitors' activism (Seo, 2025), proximal protest scale (Zhang et al., 2023), mass protests signaling regime change (Cai et al., 2025), legal settlements reducing risk (Chung et al., 2025), and peer activism making silence visible and costly (Qin et al., 2024). These effects can persist for years—the 2012 anti-Japanese movement, for example, affected Chinese firms' trade with Japan for four years (L. Tian et al., 2021).

Consequences for Indirectly Involved Organizations

Exposure and disruption effects. Initially uninvolved organizations may experience losses simply from being near contested issue environments. Naturally, violent protests and social unrest can disrupt routine business even when firms have nothing to do with them, though relational resources can either buffer or amplify exposure (Dimitriadis, 2021).

Stakeholder responses and social evaluation. The consequences of engagement are heavily shaped by audience reactions. Investors appreciate stakeholder management, but involvement in social issues that are not directly related to primary stakeholders can still hurt stock market performance (Hillman & Keim, 2001). In another recent study, Mkrtchyan et al. (2024) show that CEO activism generally produces positive market reactions and attracts ideologically aligned investors.

For customers, Hou and Poliquin (2022) that CEO support for gun control reduced store visits in conservative areas, but the effect faded quickly. For employees, CEO activism can improve employer attractiveness when seen as

authentic (Appels, 2022). The effect weakens when messages are value-incongruent or appear externally driven. Employee-aligned activism can strengthen commitment (Wowak, Busenbark, & Hambrick, 2022), whereas misaligned activism can demotivate employees without offsetting gains from those who agree (Burbano, 2021). For other stakeholders, Hadani (2024) shows that partisan political activity can reduce legitimacy in the media sphere. Firms may also incur direct political costs as a result of unnecessary sociopolitical engagement, as in Taiwan's transitional justice context (Cai et al., 2025).

Internal adaptation and organizational change. Media coverage of #MeToo affected director decision-making and candidate selection with implications for board composition (Bednar, Westphal, & McDonald, 2022). Castiglia (2025) finds that politically balanced organizations may suffer lower innovation because ideological animosity undermines collaboration under high societal polarization. Contested social issues, then, do not only trigger external audience reactions; they can reshape governance, collaboration, and internal processes (see also Barber & Blake, 2023).

Synthesis

Similar to strategy in contested issues, the around-issue literature does not support a simple choice between engagement and abstention for originally uninvolved organizations. Instead, it points to a conditional model in which the value of engagement depends on issue maturity, audience configuration, internal and external alignment. These are four recurring themes in the current literature.

Issue maturity and visibility are central. When issues remain unsettled, narrower economic framing, limited engagement, or explicit neutrality tend to be

more defensible (Bondi et al., 2025; Chung et al., 2025). As issues become settled and peer firms make silence more visible, the cost of abstention rises and public engagement becomes easier to justify (Qin et al., 2024).

Audience heterogeneity explains asymmetric effects. Evidence suggests that opponents react more strongly than supporters (Burbano, 2021; Homroy & Gangopadhyay, 2025; Hou & Poliquin, 2022). It explains why mass-market firms face higher penalties for engagement than niche firms, and why counterpositioning can be profitable only when salience is high but agreement is low (Melloni et al., 2023; Mohliver et al., 2023).

Internal ideological composition is a key enabling condition. Internal ideological alignment between leaders and employees enables credible engagement and reduces implementation frictions (Appels, 2022; McKean & King, 2024; Seo, 2025), while internal heterogeneity makes engagement riskier (Burbano, 2021; Castiglia, 2025).

Finally, ***geographic and institutional context shapes the mechanism of indirect involvement.*** Informational and reputational channels dominate in advanced democracies (Hurst, 2023; Zhang et al., 2023), while more material disruptions to resources and business conditions prevail in institutionally volatile settings (Dimitriadis, 2021; Xu et al., 2026). For multinational firms, these dynamics become more complex still, because host-country institutional conditions shape whether and how firms can maintain consistent sociopolitical positions across jurisdictions (Minefee & Yue, 2025).

Themes of Future Research

Across strategy in and around contested social issues, four broad themes define the frontier of future research. First, most empirical work is confined to narrow contexts and single time points, calling for research designs that take context and temporal dynamics more seriously. Second, the internal organizational mechanisms through which contested issues are interpreted and acted on remain coarsely theorized. Third, government policy and the state are constitutive of strategy in and around contested social issues, yet they are still poorly integrated into existing frameworks. Fourth, research is moving toward a relational and ecosystem view of contestation that recognizes the diversity and interdependence of actors in issue fields. I elaborate on each theme below.

Context and Temporal Contingency

At the level of individual studies, contextual narrowness remains a major limitation. Most studies rely on one salient issue, one country, one industry, or large U.S. public firms. Many authors therefore call for comparisons across issues, industries, private versus public firms, small versus large organizations, political systems, and home- versus host-country settings. To the extent that “best” strategies are contingent on institutional, cultural, and organizational context, such studies are where new insights are most likely to emerge (Bruijn, Georgallis, Albino-Pimentel, Kourula, & Teegen, 2023; Minefee & Yue, 2025; Sun et al., 2023). This is already clear in recent work on social venture legitimation, social enterprise advocacy, and NGO collaboration (Liu & Heugens, 2023; Mair & Rathert, 2024; Neuberger et al., 2023; Reinecke & Donaghey, 2025).

A specific contextual narrowness has to do with the context of time. A major limitation across both literatures is the tendency to study mobilization or

engagement at a single moment rather than across a full temporal arc. Yet the timing of strategy selection has been found to be critical. Issue contestation can leave relational and institutional residues that shape later opportunities for all actors (e.g., Durand & Georgallis, 2018; Meyer & Staggenborg, 2008; Waldron et al., 2020). Firms can enter moral markets by sequencing communication of values and actual practices strategically—initially keeping moral commitments and operational practices somewhat apart, then connecting them more tightly once the necessary infrastructure and legitimacy are in place (Hedberg & Lounsbury, 2021).

For issue-contesting organizations, recent work asks what happens after initial mobilization (Kim & Schifeling, 2022), how organizations institutionalize movement demands through downstream roles and occupations (Augustine et al., 2024), how collaborative institutions evolve after crisis (Reinecke & Donaghey, 2025), and how issue fields polarize or stabilize over time (Jarvis et al., 2026). For organizations around contested issues, recent papers call for more work on issue life cycles (Lyon & Maxwell, 2025), persistence of effects (L. Tian et al., 2021), post-settlement dynamics (Chung et al., 2025), organizational learning (Bruijn et al., 2023), and consistency or inconsistency of responses across repeated episodes and across countries (Minefee & Yue, 2025). A coherent basis is still needed for a separate synthesis of temporal dynamics across both streams (Kunisch, Blagoev, & Bartunek, 2021), but the emerging question is clear: not just whether strategies “work,” but how their consequences accumulate, decay, or reverse over time.

Strategy Is Still Too Coarsely Theorized

A persistent limitation across both literatures is that the internal decision process through which contested issues are interpreted and acted on remains underexplored. For issue contestants, we still know little about how organizations cultivate collective identity, manage internal disagreement, allocate scarce resources, and translate moral commitments into frames, roles, and action programs (Creed et al., 2002; Hund & Benford, 2004). Recent studies have begun to open this black box by showing that strategy is mediated by internal carriers and structures—embedded activists, occupational roles, and the organizational work required to extend reform beyond the initial moment of mobilization (Augustine et al., 2024; Heucher et al., 2024; Mair & Rathert, 2024; Schifeling & Soderstrom, 2022).

Perhaps because of this black box, issue-contesting strategy has been tested in broad categories such as insider versus outsider tactics (Briscoe & Gupta, 2016), private versus public politics (Reid & Toffel, 2009), contentious versus collaborative action (McDonnell et al., 2021), advocacy versus service delivery. This may not be how activists and activist organizations actually configure, combine, and switch among their strategic repertoires. Recent papers call for finer-grained work on tactical variation, hybrid repertoires, and strategic sequencing among social enterprises, NGOs, embedded activists, and collaborative shareholder coalitions (Mair & Rathert, 2024; Reinecke & Donaghey, 2025; Slager et al., 2023; M. S. Wang & Tracey, 2024).

A similar gap appears for strategy around issues. Even as recent experiments push on this front (e.g., Nair & Mooijman, 2025), most variance-based studies do not observe how firms interpret activist cues, diagnose legitimacy threats, weigh

competing stakeholder expectations, and choose among silence, framing, hedging, collaboration, or activism (Z. Wu & Liu, 2024). Recent work points toward managerial reflexivity, executive ideology, authenticity, and organizational political alignment as key mechanisms shaping corporate responses (Appels, 2022; Hambrick & Wowak, 2021; Wowak & Busenbark, 2024).

Government Policy and the State Are Constitutive of Strategies in and Around Contested Social Issues

In issue-contesting strategy, government policy is central, given the field's roots in protests against the state (Tilly, 1978). Recent work highlights welfare-state retreat, legal constraints on social enterprise advocacy, regime-specific legitimation strategies, state exclusion from collective-action institutions, and government policy priorities as key antecedents of contestant strategy (Liu & Heugens, 2023; Mair & Rathert, 2024; Neuberger et al., 2023; Reinecke & Donaghey, 2025). In parallel, the nonmarket strategy literature has long studied how a firm's political environment affects the form and efficacy of its nonmarket behavior (Henisz & Zelner, 2012). Future work on social issue strategies can more explicitly connect to that tradition, treating government policy, legal form, regime type, state capacity, and public regulation as core shapers of contestant organizations' tactics and trajectories (Winkler & Krzeminska, 2024).

For organizations around contested issues, government policy is not well integrated theoretically. Recent work treats legalization (Chung et al., 2025), partisan polarization, sanctions, regime transition (Cai et al., 2025), policymaker reactions (Poliquin & Hou, 2025), and local-state responses to protest as forces that reshape what indirectly exposed firms can or should do (Minefee & Yue, 2025). The unresolved agenda is to connect public policy, private politics,

CSR/CPA, and stakeholder management in one framework. The literature is moving toward a view in which firms' issue strategies are co-produced by civil society, markets, and the state, but a fully integrated theory of that interaction is still lacking (de Bakker et al., 2013; Dmytriiev, Freeman, & Hörisch, 2021; Lyon & Maxwell, 2025; Sun et al., 2023; Teegen et al., 2004).

Research Is Moving Toward a Relational/Ecosystem View of Contestation

An ecosystem view foregrounds multiple organizations with reciprocal ties, interdependencies, and flows among them (Heucher et al., 2024, p. 333). In fact, this is one of the motivations for this review: the diversity of organizations now recognized in contested issue fields, particularly their different objectives and forms, has fragmented the literature. Part of this ecosystem is the organizations that are merely proximate, associated, silent, or indirectly exposed. As noted in sampling for this review, there has been a burst of interest in non-targeted firms, community-embedded organizations, and other organizations affected by contested social issues (Briscoe et al., 2015; Hurst, 2023; Shu & Lewin, 2024; Z. Wu & Liu, 2024; Xu et al., 2026; Zhang et al., 2023). While strategies around issues remain a growing area of inquiry, the open question is increasingly when a contested issue becomes strategically material without direct targeting.

Even for direct targets and overt activists, a strong cross-paper pattern has been the shift from studying isolated organizations to studying webs of interaction among issue contestants, firms, governments, foundations, occupations, and transnational institutions (Li et al., 2016; Mena & Waeger, 2014). Recent papers stress peer networks, cross-sector collaborations, embedded activism, and tripartite governance as central but still insufficiently understood sites of strategy

(Liu & Heugens, 2023; Odziemkowska, 2022b; Reinecke & Donaghey, 2025; Schifeling & Soderstrom, 2022).

Recognized in this ecosystem view are also the polarization, countermovements, and epistemic conflict in issue arenas (Waldron, Navis, Aronson, York, & Pacheco, 2019; Yaziji & Doh, 2013). Newer papers move away from a simple movement-versus-target model and toward more fractured environments marked by ideological opposition, field polarization, contested gatekeeping, and rival interpretations of truth. Future research is being pushed toward understanding how issue contestants operate when audiences are polarized, when crises alter tactic mixes, and when misinformation or epistemic conflict destabilize the field itself (Godart, Hsu, & Negro, 2023; Jarvis et al., 2026; McDonnell et al., 2021; Odziemkowska, 2022b).

Conclusion

Taking stock of top journal articles on strategies pursued by issue contestants and by organizations that are originally uninvolved, I have reviewed the state-of-the-art literature on strategy in and around contested social issues — covering when and why some organizations perform better than others through their engagement with(in) a contested issue, the antecedents and consequences of strategic decision-making, and the role of government policy throughout. This review demonstrates the diversity of how organizations address social issues across different policy environments and stakeholder structures, but also highlights persistent gaps, such as the internal decision-making processes through which organizations interpret and act on contested issues, and how their approaches transform over time. I elaborated on several avenues for future

research to advance our understanding of how organizations navigate social issues.

CHPATER 2. A SHOT IN THE ARM: THE BOOSTING EFFECT OF OPPOSING MOVEMENT THREAT ON RESOURCE MOBILIZATION

Introduction

Social movements have driven profound social and political changes throughout history, from abolishing slavery to expanding civil rights. Building on Tilly's (1978) foundational work, scholars have consistently identified threats as powerful catalysts for such movements (Roemer, 2023; Steil & Vasi, 2014). More recently, attention has shifted to opposing movement threat, i.e., the extent to which other movements' claims would, if successful, reduce the focal movement's realization of interests (e.g., Lander, Roulet, & Heugens, 2023; Olzak, 2023). Such mobilizing threats have been seen in the longstanding tensions between the pro-choice and pro-life movements, or between gun rights and gun control movements, for example. Opposing movements, particularly the social movement organizations (SMOs) within (de Bakker et al., 2017), emerge as a focal point of inquiry within this landscape.

Current theories suggest that heightened threats should strengthen SMOs by driving resource counter-mobilization (Staggenborg & Meyer, 2022; van Dyke, 2022). Yet, in practice, some SMOs struggle under these conditions. For example, gun rights supporters faced escalating threats throughout the late 2010s and early 2020s, including post-Parkland legislative pushes and Biden administration gun control proposals. While rival organizations like Gun Owners of America and the Firearms Policy Coalition grew rapidly during this period (Van Sant, 2024), the National Rifle Association (NRA), the movement's dominant

organization, saw a 52 percent drop in revenue and lost over one million members from its 2018 peak (R. Maguire, 2023; Van Sant, 2023). These disparities underscore the need for a more nuanced understanding of how threats shape resource mobilization across different SMOs.

To address this gap, I examine how threats shift adherent preferences for specific SMOs and reshape resource competition within movements (McCarthy & Zald, 1977; Zald & Useem, 1987). While threats generally mobilize resources by creating urgency for collective action (Meyer & Staggenborg, 1996), they also intensify scrutiny over the relative efficacy of supporting different types of SMOs. Specifically, since adherents are wary of resource diversion to unrelated areas in this time of need, I argue that they are more likely to support organizations that are specialists in the focal issue and that are oriented to immediate actions (Bailey, Wang, Soule, & Rao, 2023; Grimes, Williams, & Zhao, 2019; Zald & Ash, 1966).

I elaborate on two organizational characteristics that I see as important for adherents' efficacy evaluations: issue scope as it pertains to the movement under threat (D. J. Wang et al., 2018), and temporal orientation (Flammer & Bansal, 2017). First, SMOs in a given movement might have different scopes, which affects their level of engagement with the contested issue. For example, the Black Lives Matter Global Network Foundation (BLMGNF) is a specialist in the Black Lives Matter movement (BLM) because it focuses on police brutality and racially motivated violence. In contrast, civil rights generalists such as the National Association for the Advancement of Colored People (NAACP) and the National Urban League, while in BLM, address broad issues such as economic opportunity

and education (D. J. Wang et al., 2019). I theorize that focal issue specialists will mobilize more resources in the context of a threat (Bailey et al., 2023; M. A. Taylor, 2024) because adherents can expect that their contributions will be used against the threat. Generalists, on the other hand, might divert the resources to other issues.

Second, I distinguish SMOs based on their temporal orientation (short- versus long-term)—some tend to plan far into the future, whereas others look within shorter time frames (Flammer & Bansal, 2017). The American Civil Liberties Union (ACLU), for example, is seen as often seizing short-term opportunities to defend individual rights. It is reactive and litigation-focused. The NAACP, on the other hand, is more deliberate and incremental, emphasizing long-term strategy and careful case selection to advance its civil rights goals. I argue that short-term-oriented organizations act decisively in response to threats and are more favorable to adherents in such contexts (Grimes et al., 2019). In contrast, long-term-oriented organizations, as they “bank” resources for later, risk failing to meet adherents’ expectations for urgent and substantive action in a time of need.

I test my theories using a panel of 91 pro-vaccine public charities in the United States from 2005 to 2023. The opposing anti-vaccine movement, which gained momentum in the late 1990s and peaked during the COVID-19 vaccination campaigns, posed significant threats against these organizations (Snow & Bernatzky, 2022). My analyses show that while rising threat mobilizes resources for pro-vaccine SMOs in general, there is substantial heterogeneity across organizations—some actually experience declines in contributions as threat increases. Specifically, SMOs specialized in the contested issue of immunization

experience a 64% increase in resource mobilization when threat increases, whereas generalists face a 15% decline. Similarly, short-term-oriented SMOs see an 82% increase in contributions when threat rises, while long-term-oriented ones suffer a 35% decrease.

This chapter makes several contributions to social movement and organization theories. First, I identify which SMOs benefit—and which are disadvantaged—when opposing movement threats rise. While threats are often assumed to mobilize resources ubiquitously across SMOs (Olzak, 2023; Piazza & Augustine, 2022; Roemer, 2023; Staggenborg & Meyer, 2022), I show that only specialist and short-term oriented organizations effectively capitalize. Conversely, generalist and long-term oriented SMOs face resource stagnation or even declines, failing to resonate with the urgency created by the threat. Second, I add to the discussion of the consequences of issue-spanning in social movements (Bailey et al., 2023; Olzak, 2022; D. J. Wang et al., 2019). While spanning multiple causes is usually praised for reaching more audiences (Georgallis & Lee, 2020; D. J. Wang et al., 2018), I show that the generalist approach turns into a liability when an external threat zeroes in on a single focal issue: only specialists of the contested issue capture the surge of donations, whereas generalists lose ground. Third, I add to the time horizon literature by pinpointing when short-horizon decision making outperforms long-horizon planning (Barton, Manyika, & Williamson, 2017; Flammer & Bansal, 2017). Scholars recently note that hybrids must juggle urgent mission work with future investments, risking “mission drift” if the balance is off (Argiolas, Rawhouser, & Sydow, 2024; Grimes et al., 2019; Jacobs, Kreutzer, & Vaara, 2021; Stonig & Müller-Stewens, 2025). My evidence

reveals a behavioral mechanism: when external threat heightens constituents' sense of urgency (Zhu, Yang, & Hsee, 2018), stakeholders channel resources to SMOs that act swiftly and visibly, while long-term-oriented peers lose ground. Thus, temporal fit for ideological organizations hinges on demonstrating real-time action when the cause is under fire.

Theory and Hypothesis

Resource Mobilization in Response to Opposing Movement Threat

Tilly (1978, p. 133) regards threat as a trigger for mobilization, defining it in terms of "the extent to which other groups are threatening to make claims which would, if successful, reduce the contender's realization of its interests." The theory then proceeds to suggest that individuals are inclined to mobilize collectively to safeguard their interests should they face such threats (Goldstone & Tilly, 2001; Roemer, 2023; e.g., Vasi, Walker, Johnson, & Tan, 2015). The threats could be political, economic, or against one's status, health or safety.

More recently, threats from opposing movements have drawn attention (Lander et al., 2023; Olzak, 2023; Staggenborg & Meyer, 2022). In such contexts, a focal movement is mobilized by an opposing movement that threatens its interests. The mobilization is strong especially around critical events such as restrictive government actions or large-scale protests in support of the opposing side (Meyer & Staggenborg, 1996). Laws limiting abortion or the election of anti-abortion politicians, for example, threaten abortion clinics (Piazza & Augustine, 2022). In such moments, heightened grievance, fear, and concern can compel established interests to take action to defend themselves, leading to new waves of mobilization for the focal movement (Jasper, 2011; Zald & Useem, 1987).

In this process of mobilization against opposing movement threat, I focus on the aggregation of resources, which is fundamental for any focal movement (McCarthy & Zald, 1977). SMOs depend on income, staff, and members to sustain collective action. These resources enable them to attract constituents, address emerging threats, and advance movement goals, forming the infrastructure that differentiates successful movements from those that fail (Lind & Stepan-Norris, 2011; Walker & McCarthy, 2010). Thus, I am interested in how the threat of an opposing movement affects the aggregation of resources for the focal movement.

Demonstrating the effects of threat on resource mobilization, Johnson and Frickel (2011) found that environmental degradation spurred the founding of environmental SMOs, while Roemer (2023) showed that donations to the National Rifle Association surge after school shootings because gun rights supporters perceive threats to existing favorable gun regulations. Based on these findings and other classic work (Staggenborg, 1986; Staggenborg & Meyer, 2022; Zald & Useem, 1987), I argue that opposing movement threats similarly heighten a sense of urgency, prompting constituents to support SMOs that refute opposing claims, defend the status quo, and rally counteractions—ultimately increasing these organizations' resource availability.

Hypothesis 1. The threat posed by an opposing movement causes an increase in resource mobilization for SMOs supporting the focal movement.

Efficacy Evaluations under Threat

Opposing movement threat enlarges the focal movement's resource pool, but it does not enrich all SMOs equally. When urgency rises, potential constituents

weigh not only whether to give but whom. Classic work shows that support flows to groups seen as the most effective at delivering rapid impact on the contested issue (McCarthy & Zald, 1977; Zald & Ash, 1966). Under heightened threat, adherents become wary that their contributions might be diverted to unrelated activities (Bailey et al., 2023; Goldstone & Tilly, 2001; Johnson & Frickel, 2011; Walker & Stepick, 2020). I therefore argue that they will channel resources to organizations that signal direct, timely engagement with the threat.

I elaborate on two cues that anchor adherents' efficacy judgement, corresponding to "who" the organization is and what it does. First, focal-issue specialization signals that an SMO's scope—and therefore its spending—is tightly coupled with the threatened cause, reducing the risk that funds drift to unrelated programs. Second, short-term orientation signals a willingness to deploy resources immediately rather than stockpiling them for future capacity. Together, these characteristics signal an SMO's alignment with the threat's urgency and, I argue, determine which organizations capture the new resources released in the counter-mobilization.

Focal Issue Specialization

SMOs differ in the range of resource or audience segments they target (Freeman & Hannan, 1983; D. J. Wang et al., 2018). The broader that range, the more the organization is classified as a generalist; the narrower, the more it is a specialist. Variation in issue scope could arise from strategic positioning, coalition ties, and the degree to which leaders anchor the group's agenda in a particular social problem or a broader portfolio of concerns (M. A. Taylor, 2024; van Dyke, 2003; D. J. Wang et al., 2019). Thus, even SMOs operating in the same

movement field or confronting the same threat may present markedly different issue profiles to potential constituents.

Variation in issue scope is, for example, evident in the post-9/11 U.S. anti-war movement (Heaney & Rojas, 2014). Veterans for Peace centered its participation on a single cause—opposing war from a veterans’ vantage point—making it a clear specialist. Service Employees International Union (SEIU) also marched against the Iraq War, yet its primary mandate remained workers’ rights; anti-war activity was one plank in a much broader agenda, marking SEIU as a generalist. Thus, specialists and generalists coexist within the same movement, differing in how tightly their missions are bound to the focal issue (D. J. Wang et al., 2018).

A broad scope grants an SMO flexibility (Ashforth & Mael, 1996; Georgallis & Lee, 2020, p. 59; Debra C Minkoff & Powell, 2006, pp. 599-600). The organization can always change its approach with a specific issue while preserving a sense of continuity, especially when the issue becomes challenging. Relatedly, generalists might find it easier to appeal to a broader, less specific audience for more resources (Heaney & Rojas, 2014; Hsu, Hannan, & Koçak, 2009; van Dyke, 2003) and learn from other SMOs (D. J. Wang & Soule, 2012). However, I highlight that these organizations, since they might spend the contributions on other issues (D. J. Wang et al., 2019, p. 424), may appear less efficacious in the context of a threat compared to SMOs firmly dedicated to the cause under threat.

In my context, the escalation of an opposing movement brings a focal SMO’s scope into sharp focus, making the breadth a crucial factor to consider. I argue that a narrow scope signals readiness and decisiveness, because it is related to an SMO’s authenticity and centrality within a movement (V. Taylor, 1989; Walker

& Stepick, 2020). Earlier work also suggested that specialists are better positioned to provide symbolic resources for strong adherents (Melucci, 1988, p. 343; Snow & McAdam, 2000, p. 47), especially in times of threat (Herd & Berman, 2015). Generalists, then, might appear less dependable, because it is uncertain whether they will channel mobilized resources into the issue under threat. Therefore, focal issue specialists exhibit stronger fit within the contentious environment (Boone et al., 2018; Hannan & Freeman, 1977; Zald & Ash, 1966). They have better discursive opportunities and can mobilize resources more efficiently (Koopmans & Olzak, 2004). Thus, while a movement facing threats benefits from broad resource counter-mobilization, I argue that focal issue specialists are more effective at rallying support against such threats.

The Black Lives Matter organization exemplifies this advantage of a narrow scope during a period of threat. In the wake of high-profile cases of police brutality and racially motivated violence, such as the killings of George Floyd and Breonna Taylor, Black Lives Matter became the focal point for mobilizing against these specific grievances (Kudesia, 2021). While the organization addresses systemic racism broadly, its emphasis on police violence signaled its focus on the movement. By comparison, generalists like NAACP and the National Urban League spread their efforts across multiple racial inequalities, including education, economic opportunities, and housing (D. J. Wang et al., 2019). These other work, while important to overall systemic change, may dilute perceptions of efficacy during the specific crisis, as adherents question whether their contributions will be directly channeled to the most pressing issue. My theory predicts that this perceived efficacy enables specialists like Black Lives Matter to

thrive in resource mobilization during urgent moments, whereas generalists face challenges aligning their stance with adherent expectations.

Hypothesis 2. Focal issue specialization strengthens an SMO's ability to mobilize resources when opposing movement threat rises.

Orientation Towards Short-Term Action

Time horizon shapes how organizations juggle immediate demands with investments for the future (Flammer & Bansal, 2017; Lavery, 1996). I label the emphasis SMOs place at a given moment short-term versus long-term temporal orientation—the extent to which current decisions favor rapid, mission-directed action versus capacity-building for longer-term goals (Edwards & McCarthy, 2004; Tilly, 1978). Organizations vary in this orientation as it arises from managerial choices, funding cycles, and shifting external pressures (Beaton, DeJordy, & Foster, 2021; Grimes, Williams, & Zhao, 2020; Pérez-Nordtvedt, Payne, Short, & Kedia, 2008).

Civil-rights advocacy offers a crisp contrast. The ACLU displays a short-term orientation: it routinely reacts to fresh threats with rapid, resource-intensive litigation. Shortly after the 2016 U.S. election, for example, it posted “See you in court” and solicited emergency gifts (Chanen, 2017; Murray, 2017), doubling annual donations to nearly \$300 million; within four years it would use the resources to file 400 suits against the Trump administration (Fahrenthold & Vogel, 2024). The NAACP, by contrast, has historically exemplified a long-term orientation. Beginning in the 1930s, it invested in its legal capacity—recruiting scholars such as Charles Houston, funding a dedicated litigation fund, and pursuing a multidecade sequence of test cases—that methodically built

precedent and culminated in *Brown v. Board of Education* (1954) (Public Broadcasting Service, 2004). Where the ACLU channels resources into immediate courtroom battles, the NAACP channels them into sustained capability and incremental wins aimed at durable civil-rights transformation.

SMOs often adopt a long-term orientation for managerial and strategic reasons. Like other ideological hybrids that must be both “a church and a business” (Albert & Whetten, 1985; Beaton et al., 2021; Grimes et al., 2019; Debra C Minkoff & Powell, 2006), SMOs invest in reserves, capacities and systems that position them for future challenges. Such forward-looking choices are linked to higher organizational performance in general (Barton et al., 2017; Flammer & Bansal, 2017) and, in particular, to stronger operational sustainability and resilience (Bowman, 2011; Kotsi, Aflaki, Aydin, & Pedraza-Martinez, 2023). Yet every dollar held back for tomorrow is a dollar not spent on today’s mobilization, so long-term preparedness can clash with a movement’s urgent needs (Albert & Whetten, 1985; Jacobs et al., 2021).

I argue that, when opposing movement threat spikes, focal movement adherents prize immediate counteraction over future capacity building (Jasper, 2011; Johnson & Fricke, 2011; Tilly, 1978). Urgency sharpens their time discounting: a response delivered next year feels useless when the threat is unfolding now (c.f., Flammer & Bansal, 2017, p. 1830; Laverty, 1996, pp. 843-844; Skade, Lehrer, Hamdali, & Koch, 2024; Zhu et al., 2018). Donors therefore want assurance that their contributions will fund rapid programs on the issue under threat—not reserves or infrastructure—and they withdraw support when SMOs appear to “hoard” resources for later. Long-term investments may bolster

stability in calm periods, but under acute threat they read as mission drift, eroding credibility and donations (Grimes et al., 2019; Zald & Ash, 1966; Zald & Useem, 1987). By visibly deploying resources in real time, short-term oriented SMOs signal alignment with the movement's urgency and mobilize far more support.

The case of BLMGNF shows the cost of appearing long-term oriented when supporters expect quick action. At the height of the 2020 police-brutality protests the foundation raised roughly \$90 million, yet its first fiscal filing revealed that only \$30 million (about one-third) was promptly deployed—\$21.7 million in grants to local groups and \$8.4 million for operations (Eligon, 2021). Local activists complained that BLMGNF “seemed more interested in publicity and fundraising than the gritty work of change on the ground” and “more concerned with art and literature than urgent action” (Ruiz-Goiriena, Hughes, & Ramirez, 2021). Donor confidence quickly evaporated: reported contributions fell by 88 percent from 2021 to 2022. The episode underscores my argument that, in a crisis, constituents punish SMOs that do not channel mobilized resources immediately toward the focal threat.

Hypothesis 3. Short-term orientation strengthens an SMO's ability to mobilize resources when opposing movement threat rises.

Research Context

The Pro- and Anti-Vaccine Movements in the U.S.

I tested my theoretical framework in the context of the contemporary opposing movements around immunization (Brewer, Chapman, Rothman, Leask, & Kempe, 2017; Snow & Bernatzky, 2022). On one side, the anti-vaccine movement opposes vaccination and actively seeks to persuade others to reject

vaccines. It gained momentum in the late 1990s, following a study connecting the measles-mumps-rubella (MMR) vaccine to autism. Although the study has been retracted, the movement evolved into a well-organized and wealthy network (Ahmed, 2021; Center for Countering Digital Hate, 2021). Leveraging emotion-driven media tactics, it has effectively amplified vaccine skepticism and distrust (Brewer et al., 2017). The COVID-19 pandemic further energized the movement, with the rapid vaccine development and deployment intensifying skepticism and polarizing public discourse.

On the other side, pro-vaccine activism refers to citizen-led efforts to promote vaccination uptake and counter vaccine hesitancy (Vanderslott, 2019). It originated with medical professionals and scientists addressing hesitancy but has expanded to include SMOs and advocates working to strengthen vaccination laws and public health initiatives (Doustmohammadi & Cherry, 2020). Unlike the anti-vaccine movement, which seeks to challenge mainstream practices, pro-vaccine activism reinforces established health policies and works to combat deviations from them. During the pandemic, pro-vaccine organizations' efforts became essential, not only for promoting COVID-19 vaccination, but also for countering the rise in anti-vaccine sentiment.

I chose the pro-vaccine movement as the focal side due to practical considerations related to data availability and reliability. Anti-vaccine organizations are diverse in form—spanning businesses, nonprofits, and political action committees—and are often covert in their operations, with many not officially registered with the Internal Revenue Service (IRS), using unrelated names and classifications that obscure their identities (Center for Countering

Digital Hate, 2021; Hotez, 2020). With 12 activists responsible for up to 70% of anti-vaccine content on Facebook, much of the movement's influence might stem from a concentrated network of actors rather than a broad, independently operating base. In contrast, pro-vaccine organizations benefit from greater visibility, public endorsement and state support (Brewer et al., 2017; Doshi, 2017). Their financial information is more readily accessible through IRS filings, enabling a robust and comprehensive analysis.

To illustrate variation in the antivaccine threat, Figure 2.1 plots national media coverage of the antivaccine movement from 2004 to 2023. Notably, significant antivaccine salience, misinformation, and policy contention emerged well before the COVID-19 pandemic. For instance, the 2014–15 Disneyland measles outbreak, driven by vaccine hesitancy rooted in "personal-belief" exemptions (Nagourney & Goodnough, 2015), led directly to California Senate Bill 277 (SB277), eliminating such exemptions²³. Continued antivaccine activism subsequently, however, fostered pockets of low vaccination coverage nationwide, culminating in a historic high of 1,274 measles cases in 2019—the highest since 1992 (CDC, 2025).

In light of this existing trajectory, I conceptualize antivaccine threat as a continuous field condition stretching from the post-MMR-controversy period through the COVID-19 pandemic. The 2020-23 spike therefore expands—rather than redefines—the variance in opposing movement threat. Together with

² In the U.S., vaccinations are generally required for access to certain public services, but not federally mandated for the general population. Instead, these requirements are set at the state level and are often subject to legal challenges and exemption policies.

³ Una Mesa, an advocacy group in my sample (its project Vaccinate California in particular), was instrumental in the enactment of SB 277 (Vanderslott, 2019).

regional variations in antivaccine sentiment, this context provides robust analytical leverage for examining how SMOs convert perceived threat into mobilized resources.

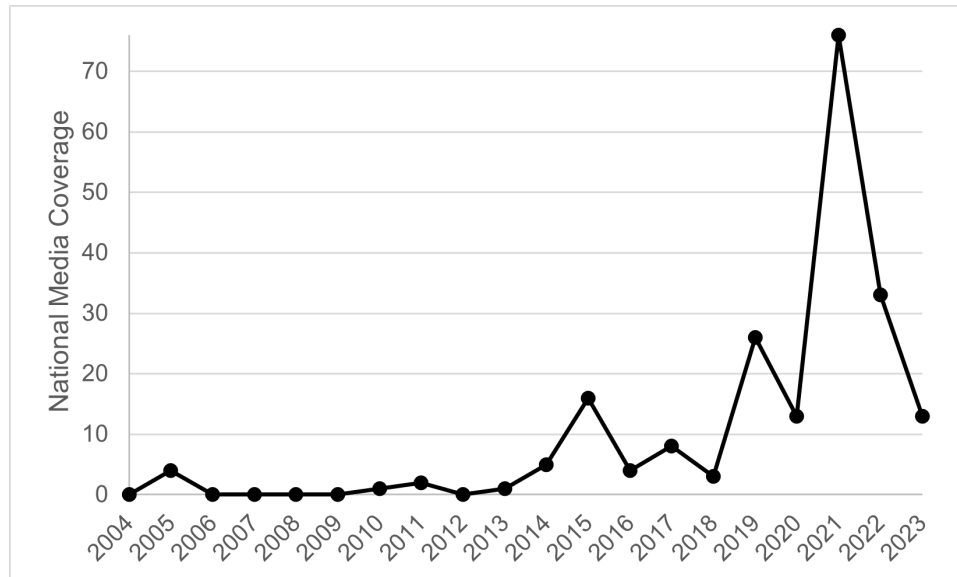


Figure 2.1. Threat of the Anti-Vaccine Movement in the U.S., 2004-2023

Notes: The number of *USA Today*, *Wall Street Journal*, & *Associated Press Newswires* articles annually that reference the antivaccine movement in headline or lead paragraph. The data were retrieved through the Dow Jones Factiva Database.

Main Data Sources and Sample

A movement industry consists of SMOs “that have as their goal the attainment of the broadest preferences of a social movement” (McCarthy & Zald, 1977, p. 1219). My dataset captures such formal participants in the pro-vaccine movement. The dataset construction involved several steps. I began with all members of the National Network of Immunization Coalitions (NNIC) from 2012 to 2022⁴. To expand beyond NNIC, I also searched for organizations with names containing “vaccin*” or “immuni*” in key directories, including the IRS Exempt Organizations Business Master File Extract (EO BMF), National Center for

⁴ The NNIC is a national pro-vaccine nonprofit that connects pro-vaccine organizations across the nation. Its members are listed on <https://www.immunizationcoalitions.org/network-members/>. The earliest point-of-time list I have is from 2012.

Charitable Statistics (NCCS) Core Files for 501(c)(3) public charities, ProPublica Nonprofit Explorer, and the *Encyclopedia of Associations (Regional, State, and Local Organizations)*. To ascertain their pro-vaccine stance, I gathered all “hit” organizations’ IRS filings, websites, social media, and affiliations with known pro-vaccine organizations and public health authorities.

After I identified all these pro-vaccine organizations’ employer identification numbers (EINs), I extracted data from their Form 990 filings from NCCS Core Files, which span 1989–2020. For additional variables and updates post-2020, I used ProPublica Nonprofit Explorer, which provides Form 990s for fiscal years ending between 2001 and 2023. While these sources could have defined the timeframe, I faced constraints from the data sources used to measure opposing movement threat.

My conceptualization of the threat is fundamentally about perceived threat—the cultural signals indicating to pro-vaccine SMOs that they risk losing public support or policy leverage. Thus, threat is inherently discursive as well as material (DiGrazia, 2017, p. 4; Downs, 1972; Steil & Vasi, 2014). A movement becomes threatening when its claims gain standing in public discourse, as this standing reshapes public opinion, policy agendas, and ultimately, resource allocation (Gamson, 2006, p. 120; Gamson & Wolfsfeld, 1993; King, 2011). Newspapers remain the core of agenda-setting discourse, widely recognized as pivotal channels through which issues gain public salience (Rohlinger, 2022).

Therefore, media attention to anti-vaccine claims—whether supportive, neutral, or critical—constitutes an actionable threat from the perspective of pro-vaccine SMOs. Salience alone can undermine immunization compliance by

increasing uncertainty and fostering motivated reasoning among hesitant populations (Recio-Román, Recio-Menéndez, & Román-González, 2023). Therefore, even negative or “debunking” coverage heightens issue salience, prompting incumbents to mobilize resources for counter-messaging and damage control (Koopmans and Olzak 2004, p. 205). Indeed, anti-vaccine activists explicitly welcome media scrutiny as a gateway to expose wider audiences to their message (Center for Countering Digital Hate, 2020, p. 38).

Thus, consistent with a longstanding social-movement scholarship tradition (Caren, Andrews, & Lu, 2020), I treat mass-media visibility as a proximate indicator of threat. News editors privilege conflict, novelty, and audience relevance (Amenta, Caren, Olasky, & Stobaugh, 2009). Sustained attention to an otherwise marginal stance such as organized anti-vaccination rarely occurs unless the movement has become large, disruptive, or influential in shaping policy outcomes (Meyer & Staggenborg, 1996).

Specifically, state-level coverage corresponding to each SMO’s location (based on its Form 990 address) was extracted from Access World News, Dow Jones Factiva, and ProQuest⁵. Measuring threat at the state level also meant that I needed to restrict my sample SMOs to state or lower-level operations. Although their contributions may originate from anywhere, I can reasonably assume the state to be the most relevant ecological context since donors prioritize giving locally to better the communities they live in (Ressler, Paxton, & Velasco, 2021; Steil & Vasi, 2014; Touré-Tillery & Fishbach, 2017). At this point

⁵ If the analysis level is lower than the state, local papers are read in adjacent neighborhoods (i.e., counties). It is not meaningful to pinpoint which newspaper only corresponds to which neighborhood.

I got a list of in total 91 pro-vaccine SMOs, 55 from NNIC and 36 from the other directories.

To ensure representativeness, I needed newspapers with substantial circulation in their respective states to capture coverage reflective of local events. Multiple newspapers per state were preferable in order to mitigate political bias and other systematic differences in the reporting of sociopolitical issues. However, newspaper databases do not comprehensively cover all titles across all periods, with earlier years being particularly sparse. Balancing these constraints, I selected the newspapers listed in Appendix B and set 2004 as the starting year for measurement. The final panel dataset spans fiscal years ended in 2005–2023, comprising 1,205 observations on 91 pro-vaccine SMOs clustered across 42 U.S. states. Observations are defined by unique EIN, state, and fiscal year ending month. The dataset is unbalanced, as not all organizations operated throughout the entire timeframe.

Measures

Resource mobilization. The dependent variable, resource mobilization is the total contributions each SMO received in a given year, referred to as "contributions and grants" on Form 990s. Following previous studies (e.g., McDonnell et al., 2021), I add \$1 and then use its natural logarithm to correct for a pronounced skew resulting from the varying sizes of SMOs in my sample.

Opposing movement threat. The independent variable, opposing movement threat is proxied by the number of vaccine-headlined articles mentioning the anti-vaccine movement in the state of an organization. Specifically, I searched for “anti-vaccin*”, “anti-vax*”, “antivaccin*”, and “antivax*” in the sources listed in

Appendix B from 2004 to 2023. Since *USA Today* circulated consistently well across all the states and years, I added it as a source for every state. The headlines must also contain “vaccin”, “immuni”, “vax”, “inocul” or “jab”. Threat was then an aggregation of the number of such articles within the fiscal years t and $t-1$ that corresponded to each SMO-year⁶. In robustness checks, I also measured the threat using only regional media coverage of the movement, online attention to the movement, and the use of threatful words in the media coverage. The results are not sensitive to these alternative measurements.

Focal issue specialization. I treat a nonprofit’s mission statement as a concise map of the issue space it targets. Each SMO reports this statement on IRS Form 990—“Primary exempt purpose” prior to 2011, “Mission or most significant activities” thereafter—making it a standardized, publicly available text (Paxton, Velasco, & Ressler, 2020). I tokenized the statements, removed stopwords, and lemmatized word stems. Using a dictionary of immunization terms compiled by the CDC’s National Center for Immunization and Respiratory Diseases (2022), I flagged a mission statement as immunization-specialized if it contained at least one dictionary lemma. A flag of 1 denotes a focal-issue specialist (narrow scope devoted to immunization); a flag of 0 denotes a generalist whose scope spans broader health or social issues. A random audit of 30 statements confirmed the rule’s face validity: flagged cases (e.g., Immunize Nevada) were clearly immunization-centric, whereas unflagged cases (e.g., Oklahoma Alliance for Healthy Families) referenced multiple program areas. In a

⁶ For example, for Louisiana Shots for Tots Coalition, fiscal year ended in December 2014, the corresponding media measurement was based on *The Advocate*, *The Town Talk*, and *USA Today* between January 1, 2013, and December 31, 2014.

robustness check, I also measured this construct using the names of the organizations, which did not change my findings.

Short-term orientation. Short-term orientation is proxied by excess revenues over expenses (financial surplus) in the previous fiscal year. For nonprofits, these surpluses can serve multiple functions, such as saving for future use or cushioning for market uncertainties (Basu, DeVides, & Harris, 2022; Bowman, 2011; Chang & Tuckman, 1990). In general, they enable long-term stability and expansion rather than immediate use of resources toward the organization's mission. I multiplied surplus by -1 so that high values (low surplus) would be interpreted as a willingness to push resources swiftly into current programs, whereas low values (high surplus) demonstrate an orientation towards long-term planning. Because surplus is recalculated each fiscal year, it captures a dynamically updated managerial stance toward immediate action, aligning with my theoretical construct. In a robustness check, I also measured this construct through the organization's budget allocation to fundraising and administration. My findings still hold.

Control variables. I based the control variables largely on the donations demand model initially developed by Weisbrod and Dominguez (1986) (see Khumawala and Shroff (2023) for a review). The control variables are (1) *organizational age*: number of years since tax-exempt; (2) *organizational size*: total assets at the beginning of a fiscal year; (3) *commercial revenue*: program service revenue; (4) *professionalization*: the compensation of officers, directors, trustees, and key employees; (5) *public politics capacity*: total amount spent on lobbying activity; (6) *fundraising capacity*: total fundraising events and gaming

gross revenue; (7) *county population*⁷ from the U.S. Census Bureau; (8) *county progressive politics* from the MIT Election Data Lab: percentage of the county population that voted Democratic in the nearest presidential elections. All the financial measures were lagged by a fiscal year to mitigate endogeneity. Last, I controlled for the natural logarithm of the length of the preprocessed mission statements (*mission word length*) in case longer missions were more likely to touch upon vaccine-related terms.

Analysis

The unit of analysis is at the organization-year level. In order to test the hypotheses, I assessed whether opposing movement threat affects the resource mobilization of a focal SMO i in state s and year t with the following log-level ordinary least squares (OLS) model.

$$\begin{aligned} \ln \text{resource mobilization}_{ist} = & \beta_0 + \beta_1 \text{threat}_{st} + \\ & \beta_2 \text{focal-issue specialization}_{ist} + \beta_3 \text{short-term orientation}_{ist-1} + \beta_4 \text{threat}_{st} \times \\ & \text{focal-issue specialization}_{ist} + \beta_5 \text{threat}_{st} \times \text{short-term orientation}_{ist-1} + \\ & \sum_k \beta_k \text{controls}_k + \varepsilon_{ist} \end{aligned}$$

The main effect of opposing movement threat was tested looking at β_1 first without the interaction terms. My theory predicts it to be positive. To test H2 and H3, I look at β_4 and β_5 . I predict both coefficients to be positive as well, i.e., the resource counter-mobilization will be stronger for the SMO-years specializing in the contested issue and immediate mission-based actions. I used

⁷ ZIP codes from NCCS Core Files and raw Form 990s on ProPublica are matched to counties (FIPS codes) using the second-quarter 2023 zip code-to-county crosswalk from the Department of Housing and Urban Development. Organizations in zip codes spanning multiple counties are assigned to the county covering the largest area.

year- and state-fixed effects to absorb macroeconomic effects, institutional confounders and how I measured threat in different states using different sources. Cluster-robust standard errors were consistently used as SMOs were nested within states.

Results

All measurements and their correlations are summarized in Table 2.1. Resource mobilization, logged in the table, has a sample mean of \$5.4 million and an SD of \$22.3 million. On average, these contributions account for approximately 74% of the total revenue of an SMO-year, highlighting the heavy reliance of the SMOs on constituent donations and their likely sensitivity to their evaluation. The correlation matrix here primarily aids in identifying collinearity (Hair, Babin, Anderson, & Black, 2019, pp. 311-317). It does not allow direct inference about my hypotheses because opposing movement threat is state-specific. Notably, there are high correlations among organizational size, commercial revenue, and professionalization, with the highest being 0.749 between size and commercial revenue. To address concerns about multicollinearity, I calculated variance inflation factor (VIF) values for all OLS estimations reported below. Apart from the fixed effects, all VIF values were below 10, suggesting that multicollinearity is unlikely to seriously distort the regression results.

Table 2.1. Summary Statistics and Correlation Table of Dependent, Independent, and Control Variables of Interest

Variable	Mean	SD	(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)	(12)	(13)
1) Resource Mobilization	12.95	3.52	1.00												
2) Opposing Movement Threat	25.20	49.44	0.07	1.00											
3) Focal Issue Specialization	0.32	0.47	-0.26	0.08	1.00										
4) Short-Term Orientation	-1.97	18.28	-0.10	0.05	0.08	1.00									
5) Organizational Age	20.30	14.11	0.25	0.15	-0.28	-0.21	1.00								
6) Organizational Size	39.03	203.08	0.22	-0.03	-0.13	-0.52	0.39	1.00							
7) Commercial Revenue	6.49	33.81	0.12	0.00	-0.11	-0.47	0.33	0.75	1.00						
8) Mission Word Length	2.49	0.67	0.20	0.17	-0.05	-0.06	0.09	0.09	0.06	1.00					
9) Professionalization	0.25	0.61	0.29	0.03	-0.20	-0.31	0.34	0.62	0.65	0.09	1.00				
10) Public Politics Capacity	0.01	0.04	0.10	0.11	-0.08	-0.01	0.03	0.04	0.18	0.03	0.34	1.00			
11) Fundraising Capacity	0.03	0.10	0.18	-0.04	-0.15	-0.09	0.23	0.12	0.15	0.08	0.16	0.15	1.00		
12) County Population	107.81	121.65	0.01	0.09	0.01	0.04	0.01	-0.07	-0.07	-0.01	-0.06	0.03	0.00	1.00	
13) County Progressive Politics	0.60	0.15	0.11	0.13	-0.09	-0.12	0.29	0.21	0.21	0.13	0.26	0.11	0.17	0.22	1.00

Notes: n = 1205. Resource mobilization and mission word length are logged. Otherwise, financial measurements are in 1,000,000 dollars, county population in 10,000.

I report the main OLS tests for the hypotheses in Table 2.2. Model 1 only includes control variables. Consistent with the literature, older ($\beta = 0.0609$, $p = 0.026$), professional ($\beta = 0.831$, $p = 0.056$) organizations, in populated communities ($\beta = 0.00813$, $p = 0.029$), capable of public politics ($\beta = 11.69$, $p < 0.001$) and fundraising ($\beta = 2.738$, $p = 0.060$), on average, mobilize more resources (Hwang & Powell, 2009; Nicholson-Crotty, 2011; Walker & McCarthy, 2010; Weisbrod & Dominguez, 1986). Higher commercial revenues are associated with fewer contributions, exhibiting a “crowding out” effect ($\beta = -0.0206$, $p < 0.060$) (Okten & Weisbrod, 2000). I discuss the main effects of focal issue specialization and short-term orientation later when comparing Models 1 and 5.

In Model 2, I add my baseline explanatory variable, opposing movement threat, which shows a positive and significant effect on resource mobilization ($\beta = 0.00406$; $p = 0.042$). This aligns with H1, suggesting that the perceived threats from opposing movements can broaden the focal movement’s resource base. Model 3 introduces the interaction between threat and focal-issue specialization, revealing a positive, highly significant coefficient ($\beta = 0.0117$; $p < 0.001$), supporting H2. SMOs that clearly signal their engagement in the contested issue mobilize more resources under higher threat. Model 4 replaces the interaction with one about short-term orientation, which is also positive and significant ($\beta = 0.000568$; $p < 0.001$), providing evidence for H3. SMOs that immediately deploy the resources they garner appear to gain stronger support in the presence of threats from the opposing movement.

Similar results appear in Model 5 that includes both interaction terms. The effect of opposing movement threat remains contingent upon issue specialization ($\beta = 0.0111$; $p < 0.001$) and short-term orientation ($\beta = 0.000546$; $p < 0.001$). Notably, their main effects are negative and significant, suggesting that, under low-threat conditions, specialist ($\beta = -2.20$, $p = 0.004$) or short-term-oriented ($\beta = -0.00467$, $p = 0.018$) SMOs may in general garner fewer resources. For issue specialization, the main effect aligns with the theory that a narrow scope limits reach (Hsu et al., 2009, p. 160; Debra C Minkoff & Powell, 2006). By contrast, generalists in my sample typically have inclusive frames (e.g., about public or community health), which might appeal to a wider base. Short-term orientation's main effect is consistent with the theory that long-term planning is valuable in periods of low threat, as it signals operational stability and sustainability for the organization's resource providers (Basu et al., 2022; Flammer & Bansal, 2017).

Table 2.2. OLS Estimation: Regressing Pro-Vaccine Resource Mobilization on Threat of the Anti-Vaccine Movement, 2005-2023

	(1) Controls	(2) Threat (H1)	(3) × Focal Issue Specialization (H2)	(4) × Short- Term Orientation (H3)	(5) Full Model
Opposing Movement Threat		0.00406 [*] (0.00194)	-0.00317 (0.00308)	0.00290 [*] (0.00116)	-0.00391 (0.00235)
Threat × Focal Issue Specialization			0.0117 ^{***} (0.00245)		0.0111 ^{***} (0.00266)
Threat × Short-Term Orientation				0.000568 ^{***} (0.0000709)	0.000546 ^{***} (0.0000826)
Focal Issue Specialization	-1.800 [*] (0.788)	-1.801 [*] (0.787)	-2.159 ^{**} (0.729)	-1.863 [*] (0.792)	-2.200 ^{**} (0.726)
Short-Term Orientation	0.00142 (0.00558)	0.00141 (0.00530)	0.00142 (0.00537)	-0.00492 [*] (0.00204)	-0.00467 [*] (0.00189)
Organizational Age	0.0609 [*] (0.0263)	0.0611 [*] (0.0262)	0.0621 [*] (0.0255)	0.0588 [*] (0.0263)	0.0598 [*] (0.0257)
Organizational Size	0.000830 (0.000582)	0.000848 (0.000579)	0.000818 (0.000566)	0.000704 (0.000531)	0.000681 (0.000525)
Commercial Revenue	-0.0206 ^{***} (0.00487)	-0.0208 ^{***} (0.00486)	-0.0206 ^{***} (0.00475)	-0.0172 ^{***} (0.00393)	-0.0172 ^{***} (0.00400)
Mission Word Length	0.107 (0.427)	0.102 (0.427)	0.122 (0.414)	0.0934 (0.425)	0.113 (0.413)
Professionalization	0.831 ⁺ (0.423)	0.842 ⁺ (0.426)	0.836 ⁺ (0.422)	0.760 ⁺ (0.349)	0.756 ⁺ (0.348)
Public Politics Capacity	11.69 ^{***} (2.207)	11.55 ^{***} (2.166)	11.77 ^{***} (2.193)	11.93 ^{***} (2.247)	12.11 ^{***} (2.279)
Fundraising Capacity	2.738 ⁺ (1.414)	2.803 ⁺ (1.406)	2.749 ⁺ (1.419)	2.709 ⁺ (1.418)	2.662 ⁺ (1.430)
County Population	0.00813 ⁺ (0.00359)	0.00820 ⁺ (0.00357)	0.00874 ^{**} (0.00307)	0.00816 ⁺ (0.00354)	0.00868 ^{**} (0.00305)
County Progressive Politics	-1.826 (2.394)	-1.877 (2.377)	-2.153 (2.250)	-1.801 (2.377)	-2.065 (2.253)
Constant	12.26 ^{***} (1.851)	12.57 ^{***} (1.832)	12.55 ^{***} (1.736)	12.55 ^{***} (1.810)	12.53 ^{***} (1.720)
State FE	Yes	Yes	Yes	Yes	Yes
Year FE	Yes	Yes	Yes	Yes	Yes
Cluster-Robust SE	State	State	State	State	State
N	1205	1205	1205	1205	1205
Number of Clusters	42	42	42	42	42
R-squared	0.486	0.487	0.493	0.495	0.500
BIC	5857.8	5862.2	5855.7	5851.4	5846.2

Notes: Robust standard errors clustered by state in parentheses. ^{*} $p < 0.10$, ⁺ $p < 0.05$, ^{**} $p < 0.01$, ^{***} $p < 0.001$.

Post-Estimation Analysis

In addition to being statistically significant, the results are also economically meaningful. If I take the coefficient of opposing movement threat from Table 2.2, Model 2, and since total contributions are in general much larger than one dollar, an increase of one SD in local threat corresponds to a 22% ($e^{0.00406 \times 49.44} - 1$) increase in contributions to a focal SMO. However, it is contingent upon issue scope and temporal orientation. On the one hand, based on Table 2.2, Model 3, specialist SMOs experience a 64% increase in contributions per SD of threat; generalists face a 15% decrease. On the other hand, a short-term-oriented SMO (one SD above the mean) mobilizes an additional 82% in response to a one-SD increase in threat, while an SMO with long-term orientation (one SD below the mean) suffers a 35% decline according to Table 2.2, Model 4. These results underscore the economically critical role of efficacy considerations in determining the resource mobilization against threat.

To further ease the interpretation of interaction terms, I plotted the marginal effects of opposing movement threat based on Table 2.2 Model 5 in Figure 2.2 while holding other continuous variables at their means and categorical variables at their base levels. Along the horizontal axis, I highlight situations where there is no threat (zero media coverage), moderate threat (coverage at sample mean, 25 headlines), high threat (one SD above the mean, 75 headlines) and extremely high threat (two SDs above the mean, 124 headlines).

Figure 2.2a shows the effect for a focal-issue specialist versus a generalist. As described earlier, specialist SMOs mobilized fewer resources than those without. However, as the threat of the opposing movement increases, specialists mobilize

more resources, whereas generalists see decreases. Likewise in Figure 2.2b, at low levels of threat, SMOs with long-term orientation mobilize more resources than those oriented towards immediate actions. However, as the threat intensifies, the dynamic reverses: short-term-oriented SMOs systematically mobilize more resources, while resource mobilization for long-term-oriented organizations declines. The growing disparity in resource mobilization highlights again how short-termism becomes increasingly attractive in contentious environments.

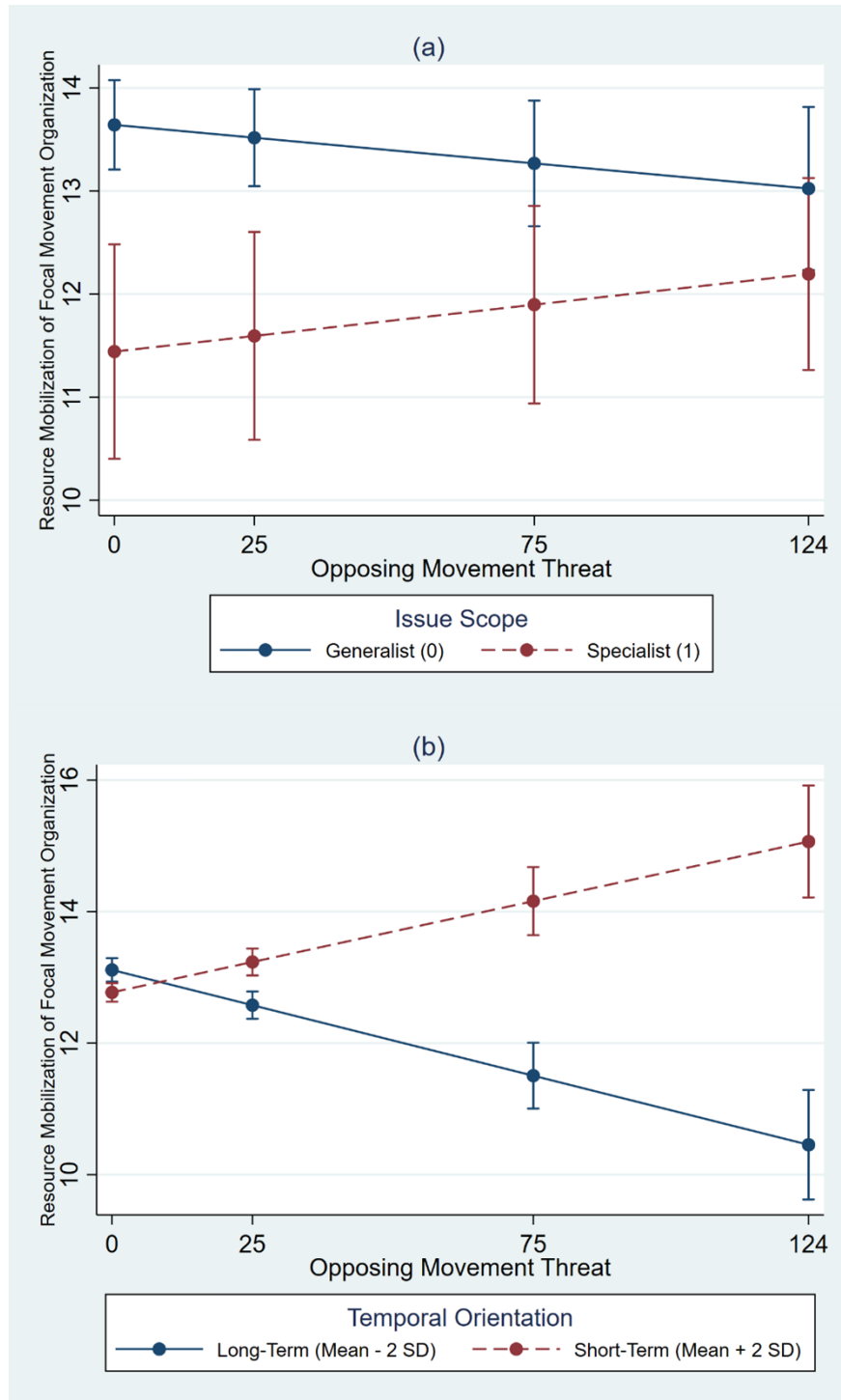


Figure 2.2. Marginal Effects of the Anti-Vaccine Movement's Threat on Pro-Vaccine Resource Mobilization

Alternative Measurements

To ensure the robustness of my findings, I ran a series of regressions using alternative measurements for the key constructs: opposing movement threat, focal issue specialization and short-term orientation. The results are shown in Table 2.3. First, I check if the results are driven by national media's coverage of the opposing movement⁸. While national major dailies are common in social movement and organizational studies, they are usually not as popular as some of the most circulated regional papers at the state level⁹. In the main results, I measured threat based on regional media and *USA Today*. Here, in the first two columns of Table 2.3, I report estimations using only regional media coverage of the anti-vaccine movement. I also tried adding another widely circulated newspaper, the *Wall Street Journal's* coverage, onto every state (results not shown but available upon request). The support for all my hypotheses is not sensitive to these different choices.

In the second robustness check, I used online public attention to measure the threat (DiGrazia, 2017; Vasi et al., 2015) in case newspapers do not perfectly reflect the real world (Amenta et al., 2009). Specifically, I collected state-level Google search interest data for the term “anti vaccine” from January 2004 to June 2023 to capture the threat of the movement. The raw monthly search data was

⁸ Regional media coverage of issues might be driven by national media. However, our theory is not about media agenda or its effects on mobilization. Even if regional media echoes national media, this echo is not identical across all states, and I interpret this heterogeneity as reflective of the varying cultural feelings of threat at the state level. I am interested in the downstream effects of threat on the embedded SMOs.

⁹ For example, as of June 2016, the most popular daily newspaper in Indiana was the *Indianapolis Star*, with a circulation of 166,540, followed by *The Times of Northwest Indiana* at 71,180 (Cision, 2016). However, according to data from the Alliance for Audited Media (AAM), around the same time, the circulation of *USA Today's* April 20, 2016, issue in Indiana was 19,390, while *The Wall Street Journal's* March 11, 2016, issue had a circulation of 19,360—ranking them approximately 8th or 9th among local newspapers in the state.

averaged annually to correspond to each SMO-year. I calculated opposing movement threat as the sum of the state's search interest averages during the fiscal years t and $t-1$ for each organization¹⁰. In Model 3, I report that the association between threat and resource mobilization remains positive and significant ($\beta = 0.0192$, $p = 0.045$). The contingencies on issue scope and temporal orientation still hold.

The third robustness check ensures that the media coverage measurement indeed captures the threat. Merely counting the number of articles might not be valid if the media describes the anti-vaccine movement as nonthreatening, which, in my theory, would not be associated with its counter-mobilization. Therefore, I analyzed the textual content of the coverage. Specifically, taking the same articles used in the main results, I counted the number of threatful words in each article based on a "threat dictionary" (e.g., "outbreak," "suffer," "tension") developed by V. K. Choi, Shrestha, Pan, and Gelfand (2022). This lexicon captures the cultural feeling of threat and has been validated in pathogen outbreak contexts (see also Way, Bond, Nanna, & Wright, 2023). Note, however, that where there was no article, there were no threatful words. Thus, in Models 5 and 6, I ran the regressions only on observations where at least one article covered the opposing movement (92% of the original sample). All the hypotheses remain supported.

In Models 7 and 8, I conducted a robustness check for H2 based on the SMOs' names. The name is a fundamental aspect of an organization's identity, the first

¹⁰ Different regions' interest over time from Google are normalized for the given region and time. Thus, similar to our newspaper-based measurement, different regions' threats are incomparable. Therefore, we consistently use state-fixed effects to estimate the within-state effect.

point of contact for constituents and reflects the organization's core commitments (Cloutier & Ravasi, 2020). Nevertheless, in the main analysis I consider them to be conservative referents. On average, names in my sample consist of 4.2 words. I argue that audience typically have more knowledge about an organization's activities and issue involvement. However, if an organization chooses to include terms such as "vaccin," "immuni," "vax," "inocul," "jab," or "shot" in its name, this signals specialization in immunization work within its scope. Therefore, I coded an SMO as specialist in focal issue if its name on the Form 990 that year contained any of the specified words or word fragments (Ressler et al., 2021). Again, although immunization specialists systematically mobilize fewer resources overall than generalists ($\beta = -2.231$, $p = 0.050$), they derive significantly more resources in response to the anti-vaccine threat ($\beta = 0.00479$, $p = 0.040$).

Last, I address the limitation of financial surplus to proxy organizational temporal orientation. SMOs with low surplus might still not commit these resources to mission-related programs. Models 9 and 10, therefore, employed an alternative measurement known as the price of giving, calculated as total expenses divided by program expenses¹¹. It provides a snapshot of how an organization allocates resources toward mission-related programs versus administration or fundraising in a given year (Kotsi et al., 2023; Weisbrod & Dominguez, 1986). As in the main analysis, I lagged and multiplied the measure by -1 so that a high value (low price) would indicate short-term orientation. In Model 9, I replicated previous studies and found a negative relationship between

¹¹ In cases where both program service expense and total expense are zero, the relevant price is set to one (Weisbrod & Dominguez, 1986). Records with a price less than 1 are excluded from the analysis because program service expense must be less than or equal to total expense. These erroneous observations make up only a few records.

donations and price, as donors prefer funding program expenses over indirect costs (Wong & Ortmann, 2016) ($\beta = 0.176$, $p = 0.001$). In Model 10, consistent with H3, the positive association between threat and resource mobilization remains contingent upon the SMO being short-term oriented ($\beta = 0.00605$, $p = 0.007$).

Table 2.3. OLS Estimation: Regressing Pro-Vaccine Resource Mobilization on Threat of the Anti-Vaccine Movement, 2005-2023

Alternative Measurements	Opposing Movement Threat						Focal Issue Specialization		Short-Term Orientation	
	Regional Sources Only		Google Search Index		Threatful Words in Article		Organizational Name		Price of Giving	
	(1) Main Effects	(2) Full Model	(3) Main Effects	(4) Full Model	(5) Main Effects	(6) Full Model	(7) Main Effects	(8) Full Model	(9) Main Effects	(10) Full Model
Opposing Movement Threat	0.00408 [*] (0.00192)	-0.00540 [*] (0.00238)	0.0192 [*] (0.00928)	0.00422 (0.00942)	0.000337 [*] (0.000165)	-0.000370 ⁺ (0.000185)	0.00411 [*] (0.00189)	0.00222 (0.00143)	0.00397 [*] (0.00194)	0.00451 (0.00423)
Threat × Focal Issue Specialization		0.0137 ^{***} (0.00293)		0.0310 [*] (0.0150)		0.000956 ^{***} (0.000246)		0.00479 [*] (0.00226)		0.0100 ^{***} (0.00236)
Threat × Short-Term Orientation		0.000677 ^{***} (0.0000618)		0.00131 [*] (0.000395)		0.0000402 ^{***} (0.00000600)		0.000511 ^{***} (0.0000773)		0.00605 [*] (0.00212)
Focal Issue Specialization	-1.800 [*] (0.786)	-2.198 ^{**} (0.728)	-1.797 [*] (0.792)	-2.119 ^{**} (0.715)	-1.869 [*] (0.870)	-2.366 ^{**} (0.843)	-2.231 [*] (1.104)	-2.412 [*] (1.138)	-1.549 [*] (0.743)	-1.870 ^{**} (0.687)
Short-Term Orientation	0.00139 (0.00530)	-0.00436 [*] (0.00208)	0.000836 (0.00509)	-0.00395 [*] (0.00151)	0.00171 (0.00545)	-0.00415 ^{**} (0.00146)	0.000471 (0.00485)	-0.00516 [*] (0.00212)	0.176 ^{***} (0.0478)	0.0488 (0.0545)
Organizational Age	0.0611 [*] (0.0262)	0.0607 (0.0256)	0.0615 [*] (0.0261)	0.0614 [*] (0.0263)	0.0634 [*] (0.0280)	0.0623 [*] (0.0272)	0.0632 [*] (0.0319)	0.0616 [*] (0.0320)	0.0541 [*] (0.0250)	0.0566 [*] (0.0246)
Organizational Size	0.000848 (0.000580)	0.000556 (0.000458)	0.000858 (0.000578)	0.000656 (0.000603)	0.000777 (0.000628)	0.000578 (0.000537)	0.00104 ⁺ (0.000550)	0.000910 ⁺ (0.000521)	0.000815 ⁺ (0.000475)	0.000829 ⁺ (0.000461)
Commercial Revenue	-0.0208 ^{***} (0.00486)	-0.0177 ^{***} (0.00394)	-0.0211 ^{***} (0.00497)	-0.0179 ^{***} (0.00405)	-0.0213 ^{***} (0.00539)	-0.0165 ^{***} (0.00422)	-0.0223 ^{***} (0.00439)	-0.0191 ^{***} (0.00360)	-0.0202 ^{***} (0.00542)	-0.0204 ^{***} (0.00529)
Mission Word Length	0.102 (0.427)	0.113 (0.413)	0.106 (0.429)	0.133 (0.421)	0.0445 (0.472)	0.0618 (0.455)	-0.173 (0.476)	-0.186 (0.474)	0.0392 (0.427)	0.0488 (0.412)
Professionalization	0.842 ⁺ (0.426)	0.729 [*] (0.352)	0.828 ⁺ (0.422)	0.777 [*] (0.356)	0.908 [*] (0.444)	0.786 [*] (0.365)	0.883 [*] (0.439)	0.812 [*] (0.375)	0.878 [*] (0.427)	0.865 [*] (0.423)
Public Politics Capacity	11.55 ^{***} (2.165)	12.45 ^{***} (2.371)	11.60 ^{***} (2.152)	11.47 ^{***} (2.180)	11.27 ^{***} (2.189)	12.16 ^{***} (2.380)	11.54 ^{***} (2.081)	11.94 ^{***} (2.146)	11.49 ^{***} (2.164)	11.66 ^{***} (2.195)
Fundraising Capacity	2.803 ⁺ (1.406)	2.692 ⁺ (1.428)	3.047 ⁺ (1.454)	2.785 ⁺ (1.516)	2.653 ⁺ (1.476)	2.510 (1.495)	2.984 [*] (1.335)	2.885 [*] (1.347)	3.122 [*] (1.300)	3.043 [*] (1.338)
County Population	0.00820 [*] (0.00357)	0.00887 ^{**} (0.00297)	0.00817 [*] (0.00363)	0.00850 [*] (0.00326)	0.00866 [*] (0.00376)	0.00919 ^{**} (0.00320)	0.0115 [*] (0.00392)	0.0116 [*] (0.00376)	0.00753 [*] (0.00345)	0.00817 ^{**} (0.00300)
County Progressive Politics	-1.875 (2.375)	-2.085 (2.228)	-1.964 (2.405)	-2.084 (2.326)	-1.875 (2.511)	-2.096 (2.376)	-2.668 (2.261)	-2.633 (2.224)	-1.722 (2.328)	-2.015 (2.256)
Constant	12.57 ^{***} (1.826)	12.73 ^{***} (1.704)	12.57 ^{***} (1.824)	12.68 ^{***} (1.754)	12.68 ^{***} (2.078)	12.70 ^{***} (1.966)	13.95 ^{***} (1.887)	13.94 ^{***} (1.835)	14.54 ^{***} (1.930)	14.66 ^{***} (1.822)
State FE	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Year FE	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Cluster-Robust SE	State	State	State	State	State	State	State	State	State	State
N	1205	1205	1205	1205	1107	1107	1205	1205	1174	1174
Number of Clusters	42	42	42	42	42	42	42	42	41	41
R-squared	0.487	0.502	0.488	0.496	0.477	0.492	0.481	0.487	0.456	0.463
BIC	5862.2	5841.8	5860.9	5855.0	5448.5	5430.9	5878.0	5876.8	5678.9	5678.0

Notes: Robust standard errors clustered by state in parentheses. ⁺ $p < 0.10$, ^{*} $p < 0.05$, ^{**} $p < 0.01$, ^{***} $p < 0.001$.

Endogeneity Issue and Instrumental Variable Approach

Identifying the impact of opposing movement threat on resources received by focal SMOs is subject to potential endogeneity concerns arising from omitted variables, reverse causality, and sample selection bias (Hill, Johnson, Greco, O'Boyle, & Walter, 2021). First, unobservable factors, such as the percentage of the public who regard the contested issue (immunization) as important, may drive both the opposing movement threat and focal mobilization efforts. Second, there will be a spurious correlation between the threat and mobilization if focal SMOs leverage their mobilized resources to strategically engage with the media to shape public opinion and drum up the perceived threat (Gamson & Wolfsfeld, 1993). Finally, sample selection bias could arise if states with high focal mobilization are more likely to express grievances associated with the opposing movement than states with low mobilization. This would suggest that the observed effects of threat reflect a prior "collective" disposition toward the opposing movement rather than exposure to the threat itself. Thus, the main econometric challenge lies in obtaining exogenous variations in the supply of threat. To this end, I retest my hypotheses using two-stage least squares (2SLS) instrumental variable regressions (Wooldridge, 2010).

For Hypothesis 1, I adapt Eisensee and Strömberg's (2007) "news pressure" instrument to predict opposing movement threat. In studying the effects of mass media on government response to foreign natural disasters, they used the availability of other newsworthy material, including the Olympic Games, as an instrument for disaster news coverage, arguing that breaking news crowds out disaster coverage but does not affect foreign aid allocation. Similarly, I use the

number of headlines on nutrition, physical activity, and obesity issues as an instrument for the coverage of the anti-vaccine movement¹². These headlines are from the same sources and timeframe used in measuring opposing movement threat itself (see Appendix B). I call it *Other Public Health Threat*.

This instrument satisfies the conditions of relevance and exogeneity (Wooldridge, 2010). It is relevant because nutrition, physical activity, and obesity are widely considered a public health priority. They compete for limited newspaper space and thereby reduce the probability of the anti-vaccine movement being covered. More fundamentally, to the extent that total societal threats are relatively stable across time (V. K. Choi et al., 2022), the scale of other societal threats should negatively predict a very specific threat. It also meets the exclusion restriction because there is no direct reason to expect that resources mobilized by pro-vaccine organizations are influenced by public agendas on nutrition, physical activity, and obesity, other than through their impact on the perceived anti-vaccine threat.

I extend this approach for H2 and H3 to robustly test the contingencies involving focal issue specialization and short-term orientation. Following Wooldridge's (2010) recommendation, I first regress opposing movement threat on other public health threat, including all control variables and fixed effects. I then use the predicted values of threat from the first-stage regression, multiplying

¹² The search query on the newspaper databases was (exercis* NEAR/3 (health OR healthy OR physical* OR fit*)) OR ((nutriti* OR eat* OR diet* OR "physical activity" OR "physical activities" OR obesity OR obese) AND (health OR healthy OR public OR wellness OR prevent* OR disease OR risk)) NOT ("environmental law" OR "eating disorder" OR "eating disorders" OR dog OR cat OR pet OR vaccin* OR immuniz*). This grouping of issues is based on CDC's prevention status reports (2013-2017). Note that this query explicitly excludes vaccine-related terms to ensure no overlap with my contested issue of interest.

them with issue specialization or short-term orientation to create instruments for the respective interaction terms.

I present the results of my 2SLS estimations in Table 2.3. Models 1–3 show the first-stage regressions, while Models 4–7 report the second-stage regressions with instrumented terms. For consistency, I use all three instruments for both the full model (Model 7) and the separate hypothesis tests (Models 4–6). The first-stage results indicate strong instrument relevance, with R^2 values all exceeding 70%. The instrument, other public health threat, is strongly negatively correlated with the endogenous variable, opposing movement threat. In Model 4, the F-statistic for the joint significance of the coefficients is 14.161 ($p < 0.0001$), confirming instrument strength per Stock and Yogo's (2005) criteria. The instruments using the predicted values of threat, $\widehat{threat}_{st} \times \text{focal-issue specialization}$ and $\widehat{threat}_{st} \times \text{short-term orientation}$ are also significantly associated with their respective endogenous counterparts.

The second-stage estimates align with my main results in Table 2.2. The coefficient for opposing movement threat is positive and statistically significant at the 1% level. In Model 5, the interaction term with focal issue specialization is positive and significant at the 0.1% level, supporting H2. In Model 6, the interaction term with short-term orientation is added, yielding a positive and significant coefficient also at the 0.1% level, supporting H3. All results hold in a fully specified model (Model 7). Overall, these results reinforce a causal interpretation of my findings: opposing movement threat induces focal SMO resource mobilization, but the effect is contingent upon the SMOs being specialists in the focal movement and oriented to short-term actions.

Table 2.4. 2SLS Estimation: Regressing Pro-Vaccine Resource Mobilization on Threat of the Anti-Vaccine Movement, 2005-2023

	First Stage			Second Stage			(7) Full Model
	(1) Threat	(2) Threat × Focal Issue Specialization	(3) Threat × Short-Term Orientation	(4) Threat (H1)	(5) Threat × Focal Issue Specialization (H2)	(6) Threat × Short-Term Orientation (H3)	
Other Public Health Threat	-0.820** (0.245)	-0.0285 (0.0682)	0.213 (0.323)				
Predicted Values × Focal Issue Specialization	0.217* (0.120)	1.141*** (0.209)	0.717 (0.685)				
Predicted Values × Short-Term Orientation	0.00437** (0.00125)	0.00138* (0.000529)	0.935*** (0.0897)				
Opposing Movement Threat				0.0201** (0.00621)	0.00799 (0.00756)	0.0168** (0.00526)	0.00465 (0.00568)
Threat × Focal Issue Specialization					0.0138*** (0.00331)		0.0138*** (0.00334)
Threat × Short-Term Orientation						0.000448*** (0.000110)	0.000450*** (0.000128)
Focal Issue Specialization	-7.312 (5.203)	-5.036 (7.836)	7.880 (10.71)	-1.803* (0.747)	-2.226*** (0.659)	-1.852* (0.751)	-2.276*** (0.656)
Short-Term Orientation	0.0114 (0.0217)	0.0139* (0.00652)	11.10*** (0.468)	0.00140 (0.00411)	0.00141 (0.00439)	-0.00359+ (0.00215)	-0.00361+ (0.00194)
Organizational Age	-0.121* (0.0515)	-0.0608 (0.0491)	-1.217 (0.997)	0.0622* (0.0247)	0.0631** (0.0240)	0.0602* (0.0248)	0.0611* (0.0242)
Organizational Size	0.000435 (0.00480)	0.00496 (0.00309)	-0.155 (0.268)	0.000920+ (0.000548)	0.000868 (0.000538)	0.000795 (0.000528)	0.000743 (0.000517)
Commercial Revenue	0.0505** (0.0185)	-0.0129 (0.0152)	2.548* (0.952)	-0.0215*** (0.00467)	-0.0212*** (0.00457)	-0.0186*** (0.00409)	-0.0182*** (0.00409)
Mission Word Length	0.459 (1.357)	0.483 (1.132)	9.165 (7.324)	0.0827 (0.410)	0.111 (0.397)	0.0787 (0.408)	0.107 (0.396)
Professionalization	-1.248 (2.063)	0.321 (0.901)	71.77+ (42.04)	0.887* (0.423)	0.869* (0.414)	0.816* (0.363)	0.797* (0.354)
Public Politics Capacity	42.33 (27.82)	7.728 (4.933)	258.3* (104.0)	11.03*** (2.107)	11.40*** (2.122)	11.40*** (2.143)	11.77*** (2.195)
Fundraising Capacity	-1.178 (3.666)	4.434 (6.686)	35.96 (74.38)	3.059* (1.328)	2.938* (1.366)	2.948* (1.331)	2.826* (1.366)
County Population	-0.00490 (0.00947)	0.00269 (0.00857)	-0.0240 (0.0692)	0.00844* (0.00338)	0.00903*** (0.00274)	0.00838* (0.00335)	0.00897*** (0.00270)
County Progressive Politics	-2.674 (6.949)	-6.776 (6.779)	-28.31 (45.00)	-2.079 (2.204)	-2.360 (2.054)	-1.990 (2.210)	-2.271 (2.055)
Constant	-2.302 (15.95)	7.429 (8.381)	-36.50 (38.59)	13.79*** (1.756)	13.49*** (1.673)	13.59*** (1.725)	13.29*** (1.637)
State FE	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Year FE	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Cluster-Robust SE	State	State	State	State	State	State	State
N	1205	1205	1205	1205	1205	1205	1205
Number of Clusters	42	42	42	42	42	42	42
R-squared	0.746	0.781	0.941	0.469	0.482	0.481	0.492

Notes: Robust standard errors clustered by state in parentheses. + p < 0.10, * p < 0.05, ** p < 0.01, *** p < 0.001.

Discussion

Political process theories suggest that threats can mobilize collective action (Tilly, 1978; van Dyke, 2022), with recent research particularly interested in opposing movement threats (e.g., Lander et al., 2023; Olzak, 2023; Piazza & Augustine, 2022). However, this literature has not systematically examined the effect of threats at the organization level. While movements as a whole may rally in response to threats (Meyer & Staggenborg, 1996), individual SMOs must compete for resources (Barnett & Woywode, 2004; McCarthy & Zald, 1977; Zald & Useem, 1987), and it remains unclear who wins or loses in this competition. I address this gap by revisiting the idea of efficacy considerations in resource mobilization, but in the context of a threat. I argue that driven by the urgency to act, resource providers would favor issue specialists and short-term oriented organizations because contributions to these organizations would seem more effective in countering the threat (Meyer & Staggenborg, 1996; Tilly, 1978; Zhu et al., 2018). In comparison, generalists and long-term oriented organizations might not only fail to ride the wave but actually lose resources to their more effective counterparts.

Testing this framework in the context of the American anti-vaccine movement (2005–2023), I find strong empirical support for my claims. First, I report that local threats from the anti-vaccine movement did increase contributions to pro-vaccine SMOs, suggesting that opposing movement threats expand the focal movement's resource base. However, I find that which SMO is able to mobilize these resources is highly contingent. Organizations with a narrow scope around immunization systematically mobilized more resources, illustrating how

specialists attract more support in contentious environments (Bailey et al., 2023; D. J. Wang et al., 2018). Similarly, SMOs that deployed resources in a timely manner experienced systematically greater resource mobilization under threat, reflecting the appeal of short-termism (Grimes et al., 2019). Conversely, generalists or long-term-oriented SMOs faced resource losses when threats intensified, suggesting that they failed to align with the urgent adherent expectations, and that these characteristics can be a liability in counter-mobilization against threats. Robustness checks confirm these patterns, reinforcing my theory that effective threat mobilization depends on efficacy evaluations with regards to what an organization is and what it does.

Implications for Social Movement and Organization Theory

First, I contribute to social movement studies by proposing a critical contingency on which resource mobilization against a threat relies (Meyer & Staggenborg, 1996; Tilly, 1978; van Dyke, 2022). While the existence of a local threat has long been considered a demand-side factor that generates resources for a movement (Roemer, 2023; Staggenborg, 1986; Steil & Vasi, 2014), I challenge the assumption that individual SMOs necessarily “benefit” or ride the wave of this threat. Instead, SMOs mobilize resources at varying levels based on how the audience evaluate their efficacy vis a vis context of the broader movement (McCarthy & Zald, 1977; Zald & Ash, 1966). Building on recent work on boundary-spanning, time horizon and audience evaluation at the organizational level, I elaborate on adherents’ efficacy considerations in this time of urgency (Bailey et al., 2023; Walker & Stepick, 2020; D. J. Wang et al., 2018). SMOs that are peripheral around the grievance, or are oriented towards growth

and long-term planning, do not resonate with the urgency of a threat and thus can fail to mobilize resources (Zhu et al., 2018).

My results also speak to the ecological literature on ideological positioning (Barnett & Woywode, 2004; Boone et al., 2018), which shows that competition is fiercest among “adjacent rivals.” I zoom in on such rivals within a movement and find that, under external threat, audiences reallocate resources toward actors signaling ideological purity—unwavering, immediate confrontation—while generalist or long-term-oriented peers lose ground. This shift echoes the emerging concept of audience plasticity—the ability of audiences to reorganize their memberships and valuation criteria when environments change (Isenring, Durand, & Laamanen, 2025). Threat, in other words, renders audiences plastic and heightens their preference for positional clarity (Boone et al., 2018; Meyer & Staggenborg, 1996). I suggest future research embed this efficacy mechanism in formal models of ideological crowding to test how varying threat levels might reshape niche width over time.

Second, my work adds to the literature on the consequences of categorical boundary spanning in social movements (Bailey et al., 2023; D. J. Wang et al., 2018; D. J. Wang et al., 2019). Much prior work has highlighted its upsides—broader appeal, flexibility, and the ability to juggle diverse audience demands (Ashforth & Mael, 1996; Georgallis & Lee, 2020; Debra C Minkoff & Powell, 2006; D. J. Wang et al., 2018). More recent work, however, questions whether these benefits hold in all circumstances. D. J. Wang et al. (2018, p. 182) speculate that spanning may raise coordination costs and blur perceptions of commitment; Olzak (2022) links spanning to ideological ambiguity that erodes legitimacy.

Experiments by Bailey et al. (2023) push the point further: participants are most willing to join a movement when it combines a diverse supporter base and a single-issue focus, showing that audiences assess multiple movement attributes jointly rather than in isolation.

My findings extend this emerging dialogue by revealing a specific contingency: the advantages of spanning disappear—and can even reverse—when a salient external threat targets the focal issue. During such periods, only organizations clearly specialized in the contested issue attract the surge of resources unlocked by that threat; boundary-spanners, by contrast, experience relative decline as supporters funnel donations and attention toward “true believers” (Hsu et al., 2009). The pattern suggests that movement constituents weigh issue urgency alongside collective identity: when urgency is high, clarity and alignment trump inclusivity (Bailey et al., 2023; Melucci, 1988; Snow & McAdam, 2000). Therefore, by demonstrating issue scope’s role in adherents’ evaluation of SMOs, I refine the boundary-spanning literature’s understanding of the associated tradeoffs in issue spanning.

Last, my results speak to literature on the impact of time horizon on organizational performance (Barton et al., 2017; Flammer & Bansal, 2017). This research emphasizes that neither short-term nor long-term orientations are inherently superior; instead, performance depends on adapting decision horizons to environmental demands—known as “entrainment” (Kunisch et al., 2021; Pérez-Nordtvedt et al., 2008). Recently, a growing interest is in the unique temporal complexity facing hybrid or ideological organizations, which must carefully balance near-term mission delivery with future-oriented investments

(Argiolas et al., 2024; Beaton et al., 2021; Jacobs et al., 2021; Stonig & Müller-Stewens, 2025). Audiences may interpret short-termism as either responsiveness or opportunism, depending on the context (Grimes et al., 2020). However, in what context and how behaviorally short-termism turns into perceived mission drift and stakeholder dissonance remain poorly understood.

I integrate this literature with social movement theory to shed new light on these mechanisms. Organizations continuously navigate intertemporal choices between immediate mission responses and long-term alternatives. However, constituents facing an external threat experience heightened urgency, prioritizing immediate actions (Meyer & Staggenborg, 1996; Tilly, 1978; Zhu et al., 2018). In such a context, when their mission is threatened, organizations only achieve temporal fit—and therefore greater stakeholder support—by acting swiftly and visibly (Grimes et al., 2019; Kouamé, Hafsi, Oliver, & Langley, 2022).

Managerial Implications

My findings reveal how the ebb and flow of threats create windows of opportunity for SMOs to mobilize resources, provided they act decisively and demonstrate alignment among their identities, actions, and the broader movement collective. Because public interest can shift rapidly, failing to address threats with urgency risks alienating stakeholders, who may redirect support to more efficacious peers. The example of NRA illustrates such dangers of misalignment, where resource misallocation eroded trust and resulted in significant losses despite growing support for the movement (R. Maguire, 2023; Van Sant, 2023, 2024). Ultimately, practitioners must anchor their social mission and strategic goals in sensitive external referents—community needs, donation

patterns, and public sentiment—to detect viable opportunities and maintain relevance. By aligning with contextual demands, SMOs can remain central to their cause, sustain stakeholder trust, and mobilize resources effectively.

Firms that pledge support for contested social issues like BLM face a parallel dynamic (Hambrick & Wowak, 2021). To the extent that stakeholders (customers, employees, and investors) identifying with given issues are like movement adherents, I contend that they mobilize only when they observe concrete, timely, and issue-congruent actions (e.g., Ponce de Leon, Carter, & Rosette, 2024). Symbolic endorsements without substantive follow-through signal misalignment, triggering backlash and eroding competitive position in an emerging “moral market” where peer firms court the same stakeholder adherents (Georgallis & Lee, 2020). Managers should therefore (a) commit visible, timely, and irreversible resources, (b) choose causes that fit the firm’s identity, and (c) communicate progress on a cadence that matches external attention cycles. Failure on any of these fronts does not merely generate missed upside; it can actively shift stakeholder support to faster-moving, better-aligned rivals.

Limitations

First, my theoretical framework essentially describes a process of attribute abstraction, induced by threat, that inserts organizations into specific categories through interactions with constituents and peer SMOs (Negro & Olzak, 2019; D. J. Wang et al., 2018). While I focus on issue scope and temporal orientation as key contingencies, other characteristics—such as transparency, innovation, or leadership—may similarly shape the perceived efficacy of SMOs and their mobilization outcomes (e.g., McDonnell et al., 2021; Snow & McAdam, 2000).

Second, my theory is tested on relatively large organizations that actually submit Form 990 or Form 990-EZ to the IRS. The effects of opposing movement threat may differ for smaller local SMOs (Kudesia, 2021; Steil & Vasi, 2014; Walker & McCarthy, 2010). Third, the American institutional context offers unique political and cultural opportunities for social movements (Gamson, 2006, p. 120). It remains unclear whether threats alone can drive resource mobilization in other political systems (van Dyke, 2022). Comparative studies, therefore, could explore how other structural factors, such as governance structure, entry points for activism and mass media shape the dynamics of opposing movements and the effectiveness of threat-induced mobilization (Staggenborg & Meyer, 2022; Zald & Useem, 1987).

In conclusion, this chapter addresses a critical gap in social movement theory by examining how threats shape resource mobilization at the organizational level. I argue that, under threat, SMOs compete for newly available resources, with perceived efficacy emerging as the decisive factor for constituent support. By integrating insights from boundary-spanning and temporal fit literatures, I highlight how a narrow scope around the contested issue and short-termism allow SMOs to respond to the urgency and secure resources in opposing movements. The findings provide a foundation for further exploration of organizational responses in contentious and crisis-driven environments.

CHPATER 3. BACKING OUT-OF-PLACE CAUSES: VISIBILITY CHOICES IN CORPORATE GIVING

Introduction

Corporate philanthropy is one of the most visible ways firms engage in corporate social responsibility. Prior work has shown that giving can strengthen stakeholder relations, build symbolic capital, and even insure firms against negative evaluations (Gautier & Pache, 2015; Luo, Kaul, & Seo, 2018; Shymko, Roulet, & de Melo Pimentel, 2023). Within this broader terrain, advocacy giving—donations to nonprofits that seek to shape policy, public opinion, or the terms of social debate—is becoming increasingly central to firms' stakeholder strategies (Seo, 2025).

Yet advocacy giving departs from the image of philanthropy as uniformly reputationally beneficial. Because advocacy recipients are politically coded, support for them can be interpreted not simply as generosity but as taking sides. The same donation may generate approval among employees, investors, and aligned consumers while provoking backlash from activists, community members, politicians, or regulators who hold different views (Bhagwat et al., 2020; Hambrick & Wowak, 2021). For firms that operate across polarized environments, advocacy giving therefore creates a basic but unresolved problem: how can a donation be used to build stakeholder goodwill when that very same donation may trigger sanctions from other stakeholders?

Building on recent work on selective disclosure (H. Wang, Jia, & Zhang, 2021), I argue that firms manage this tension by treating visibility itself as a strategic dimension of corporate giving. Specifically, firms make two linked decisions. First,

they decide whether to support an advocacy nonprofit. Because employees are a salient stakeholder audience in CSR and often press firms to back causes consistent with their values, firms should be more likely to support recipients whose ideological orientation aligns with their workforce (Clarkson, 1995; Seo, 2025). Second, conditional on giving, firms can choose a channel that makes the firm-recipient tie more or less visible to outside audiences. In the United States, foundation grants are systematically disclosed on IRS Form 990-PF, whereas direct corporate gifts are typically less visible (Douglas Beets & Beets, 2019). This difference gives firms a structural way to preserve support for employee-valued causes while limiting exposure where backlash is more likely.

From this perspective, I further argue that firms consider recipient–local political misalignment in making the channel choice for an advocacy donation. When an advocacy nonprofit is ideologically out of step with the political climate of the state in which it is located, visible support should be more vulnerable to local disapproval and sanction risk (Marquis, Toffel, & Zhou, 2016). Firms will therefore be more likely to shift such giving into the lower-visibility direct channel. This tendency should be strongest when the tie is more likely to attract attention or become costly—namely, when the recipient is larger and when the firm already faces social controversy.

I test these arguments using a dataset of advocacy giving by 99 S&P 500 firms to 1,632 unique 501(c)(3) advocacy nonprofits between 2018 and 2024. The evidence supports the theory. Firms are more likely to donate to advocacy nonprofits aligned with employee ideology. Conditional on donating, they are more likely to use direct giving rather than foundation giving when the recipient is

politically misaligned with its local state environment. This relationship is stronger for larger recipients and for firms with greater controversy exposure. Together, these findings show that firms do not manage contested philanthropy only by deciding whether to support a cause; they also manage it by calibrating the visibility of that support across audiences.

This chapter makes three contributions to the corporate giving literature. First, it shows that visibility is a strategic design dimension of corporate philanthropy (Douglas Beets & Beets, 2019; H. Wang et al., 2021). In doing so, it moves the literature from quiet giving as post hoc silence to low-visibility channel choice as an ex ante organizational response to politically heterogeneous audiences. Second, it broadens stakeholder theorizing in corporate giving by showing that philanthropic strategy is shaped not only by the donor–recipient relationship but also by third-party audiences in the recipient's local political environment (Marquis & Tilcsik, 2016; Shymko et al., 2023). Third, it bridges corporate giving and nonmarket strategy by identifying low-visibility channel choice as a way firms sustain contested advocacy support while managing sanction risk in polarized environments (Bhagwat et al., 2020; Hambrick & Wowak, 2021; Homroy & Gangopadhyay, 2025).

Theory and hypothesis

Advocacy Giving as Stakeholder Management Under Political Polarization

Corporate philanthropy is a discretionary CSR investment that firms use to build and maintain stakeholder goodwill and relational capital (Carroll, 1979; S. Choi, Park, & Xu, 2023; Luo et al., 2018). Much of this work implicitly treats philanthropic giving as broadly prosocial, an activity that can be communicated

publicly to generate reputational returns. Advocacy giving, however, places firms in a more contested reputational and political terrain (Seo, 2021, 2025). Because advocacy recipients (e.g., activist organizations, think tanks) take positions on divisive issues, donations can be interpreted less as general ‘doing good’ and more as a signal of values and issue commitments. In this setting, the same donation can generate goodwill with some stakeholders while triggering disapproval or retaliation from others (Bhagwat et al., 2020; Homroy & Gangopadhyay, 2025; Mohliver et al., 2023).

This creates a distinctive stakeholder-management problem: managers must decide not only whether to support a particular advocacy nonprofit, but also how to support it, under conditions of audience heterogeneity. Building on prior research of transparency and selective disclosure where organizations calibrate what is observable to mitigate scrutiny costs while preserving the benefits of action (Carlos & Lewis, 2018; Marquis et al., 2016; H. Wang et al., 2021), I conceptualize corporate advocacy giving as a two-stage decision. First, firms choose whether to donate to a given advocacy nonprofit, reflecting the internal value pressures that make support attractive. Second, conditional on donating, firms can choose a giving channel that makes the firm–recipient tie more or less observable to external audiences. This second stage allows firms to navigate cross-pressures when internal stakeholders value a donation that local external stakeholders may condemn.

Employee Alignment and the Decision to Donate

Among the stakeholder audiences managers must account for when investing in CSR, employees are a salient group (Clarkson, 1995). Employees’ attraction,

retention, and motivation are affected by the firm's social posture and giving portfolio (Burbano, 2021; Flammer & Luo, 2017; T. Y. Tian, King, & Smith, 2023). Employee charitable gift matching programs—ubiquitous at large corporations—epitomize the idea of corporate philanthropy as a recruitment, engagement, and retention tool. Chief Executives for Corporate Purpose (2021, p. 24) found that among its 230 survey participants, 93% offered at least one matching-gift program and 40% offered more than two.

Nevertheless, employee responses are not uniformly positive when the firm just gives more (c.f., Gupta, Briscoe, & Hambrick, 2017). CSR misaligned with employees' values can be alienating and demotivating, and therefore the content of corporate giving, what causes are supported, becomes strategically important (Bundy, Vogel, & Zachary, 2018; Burbano, 2021). This logic is especially strong in advocacy giving, where recipients are politically coded and donations function as identity- and values-relevant signals (Seo, 2021, 2025). There is evidence that much corporate philanthropy targeting specific social issues (such as the rights of sexual minorities) is indeed realized through internal efforts by employees (e.g., Briscoe & Safford, 2010).

Consistent with adjacent work on corporate sociopolitical activism, firms' social and political actions tend to reflect internal value pressures, particularly employee ideology, because employees reward congruent stances and punish incongruent ones (Burbano, 2021; McKean & King, 2024; Wowak & Busenbark, 2024). Therefore, when considering an advocacy donation, firms should prefer recipients whose political orientation aligns with the political orientation of their

employees, because aligned giving is more likely to generate internal goodwill and less likely to generate internal backlash.

Hypothesis 1. Firms are more likely to donate to an advocacy nonprofit when the nonprofit's political orientation is more aligned with the political orientation of the firm's employees.

Local Political Exposure and Visibility Management via Giving Channels

Employee preferences are central in shaping whether firms support advocacy nonprofits. Yet advocacy donations also implicate external audiences whose approval matters for the viability of the cross-sector relations (Odziemkowska, 2022b). Because recipients take positions on contested issues, a donation—if publicized—can function as a public affiliation and be interpreted as underwriting one side of an ongoing political conflict (Bertrand, Bombardini, Fisman, & Trebbi, 2020). That interpretive load creates the possibility of backlash from external stakeholders whose values diverge from those of the firm's employees (Bhagwat et al., 2020; Homroy & Gangopadhyay, 2025; Mohliver et al., 2023).

Crucially, the audience for such backlash and its sanctioning capacity are often jurisdiction-specific (Marquis, Glynn, & Davis, 2007; Minefee & Yue, 2025). In the U.S., state and local governments exercise discretion over economically meaningful levers: public procurement, tax incentives and subsidies, permits and licensing, and the priorities of regulatory enforcement. Firms have incentives to manage political exposure in the places where they operate (Aobdia, Koester, & Petacchi, 2024; Bird, Karolyi, & Ruchti, 2023; Gupta, Murphy, & Briscoe, 2025). Corporate political strategy research explicitly treats these government decisions

as objects of firm strategy, because firms seek to shape policy outcomes and manage dependence on governmental actors (Hillman, Keim, & Schuler, 2004).

Accordingly, when an advocacy nonprofit's political orientation is incongruent with the prevailing local political climate in the recipient's jurisdiction, the donation increases the risk of political and economic sanctions (Poliquin & Hou, 2025). Recent events demonstrate that such politically motivated and values-based retaliation is entirely possible. After Delta Air Lines decided to stop offering discounts to NRA members, the Georgia legislature removed a tax credit for jet fuel from a tax relief bill (Fausset, 2018). After Disney openly opposed a Florida education bill addressing LGBT issues, Florida lawmakers changed regulations governing Disney's special district (Barnes, 2023). Not only state governments, but local governments may also consider a firm's sociopolitical background when calling for contracts and making access decisions. For example, one reason the City of San Antonio excluded Chick-fil-A from its airport concession was its disapproval of certain issue-related donations by the restaurant chain (Yaffe-Bellany, 2019).

When firms face this kind of cross-pressure, with employees valuing the cause but local external stakeholders disapproving, I argue that firms can manage not only what they support but also how visible that support is (see also Brakman Reiser & Dean, 2023; Seo, 2025, p. 1338). Research on transparency and selective disclosure emphasizes that organizations often calibrate what is observable to mitigate scrutiny costs while preserving the benefits of action (Carlos & Lewis, 2018; Marquis et al., 2016). Visibility might be structured through giving channels that vary in mandated disclosure and the ease with which

observers can attribute support (H. Wang et al., 2021). For example, in the U.S., corporate foundations disclose grants on IRS Form 990-PF, whereas direct corporate gifts are typically not disclosed in comparably comprehensive and standardized ways (Douglas Beets & Beets, 2019). In the advocacy context, rather than abandoning a donation that creates internal value, firms can reduce attribution to hostile local audiences by shifting support into a less visible giving channel, preserving insider-valued support while limiting exposure.

Hypothesis 2. Conditional on donating to an advocacy nonprofit, firms are more likely to route support through a lower-visibility giving channel when the nonprofit's political orientation is more misaligned with the local political climate in the recipient's jurisdiction.

Local Misalignment and Organizational Characteristics

The core mechanism proposed above is that firms can manage conflicting stakeholder demands through visibility management, structuring the observability of donations to external audiences by choosing a giving channel that is more or less visible. Nevertheless, if channel choice is fundamentally about anticipated disapproval under observability, the misalignment effect should be strongest when the firm–recipient tie is (a) most likely to become publicly attributed and (b) most costly once attributed. I specify two boundary conditions that increase the expected salience and expected costs of a contested donation: recipient size and firm controversy exposure.

First, larger advocacy nonprofits are typically more salient actors in public discourse. Organizational size correlates with visibility and stakeholder attention, increasing the likelihood that an organization's actions and affiliations are noticed

and discussed (Fombrun & Shanley, 1990). Salient targets also tend to attract more selective attention and more intense evaluations (Sanbonmatsu, Shavitt, & Gibson, 1994), which raises the probability that a politically incongruent recipient becomes focal in local contestation. In the advocacy domain, larger organizations are more likely to be monitored by opponents, covered by media, and targeted in political conflict, increasing the probability that donor identities are surfaced and interpreted as taking sides (Amenta et al., 2009; King, 2008; McDonnell et al., 2021). As a result, when a recipient is locally misaligned, the expected cost of public association for the donor firm should increase with recipient size, strengthening incentives to route support through a less visible channel.

Hypothesis 3. Conditional on donating, the positive relationship between recipient–local political misalignment and the likelihood of using a less visible giving channel is stronger when the recipient advocacy nonprofit is larger.

Second, firms also differ in their vulnerability to reputational and political sanctions. When a firm already carries a lot of social controversies, stakeholders are less likely to extend the benefit of the doubt and more likely to interpret subsequent actions through a critical lens (Harrison, Ashforth, & Corley, 2009; King, 2008). Prior research suggests that this reputational vulnerability spills into the nonmarket arena. Firms with weaker reputations and lower social performance often face reduced political access and less favorable treatment by political actors (Flammer, 2018; McDonnell & Werner, 2016; T. Werner, 2015). Because firms use CSR—including philanthropy—as a form of reputational insurance and as a way to buffer stakeholder sanctions (Luo et al., 2018; McDonnell & King, 2013), controversial firms have particularly strong incentives

to avoid additional visible affiliations that could trigger backlash. Therefore, when an advocacy recipient is locally misaligned, firms with greater controversy exposure should be especially likely to shift the donation into a less visible channel to reduce attribution and limit reputational escalation (Shanor, McDonnell, & Werner, 2021).

Hypothesis 4. Conditional on donating, the positive relationship between recipient–local political misalignment and the likelihood of using a less visible giving channel is stronger when the firm has greater current exposure to social controversy.

Research Context

Direct and Foundation Giving in the U.S.

Corporate philanthropy in the United States can be routed either directly from the firm or through a corporate-sponsored private foundation (Brakman Reiser & Dean, 2023; Douglas Beets & Beets, 2019; Gautier & Pache, 2015). Although firms are generally not required by state law or the SEC to disclose giving information, corporate foundations must publicly report their activities annually on IRS Form 990-PF (Tremblay-Boire, 2020). The two channels therefore differ systematically in observability to external audiences: foundation giving is comparatively transparent, whereas direct corporate giving can remain largely undisclosed (see also Minefee, Neuman, Isserman, & Leblebici, 2015; Morris & Bartkus, 2015).

This institutional structure creates managerial discretion over the publicity of corporate philanthropy. Firms are not required to establish foundations, and firms that have foundations are not required to route all giving through them. Consistent

with this discretion, surveys of large firms indicate that roughly half of corporate contributions are direct, even among firms that maintain foundations (see e.g., Chief Executives for Corporate Purpose, 2023). In turn, channel choice provides a practical lever for visibility management: firms can use foundation giving when public association is beneficial, and direct giving when public association is likely to invite controversy or stakeholder sanction (Brakman Reiser & Dean, 2023; Douglas Beets & Beets, 2019). ExxonMobil's donations to Oxford University, for example, became publicly salient only after activism and investigative reporting surfaced gifts that were not visible through foundation filings (Temple-West, 2021).

Relatedly, repeated legislative efforts to mandate greater corporate giving disclosure have typically faced firm resistance (Ofer, 2025, pp. 529-530). If philanthropic visibility were uniformly beneficial, firms would have strong incentives to publicize giving even absent legal mandates. The persistence of undisclosed giving and resistance to disclosure therefore suggests that discretion is not incidental, but actually part of how firms manage the stakeholder consequences of philanthropy (see also Bertrand, Bombardini, Fisman, Hackinen, & Trebbi, 2021; Ofer, 2025).

Data Sources and Sample Construction

I begin with all S&P 500 constituent firms from CRSP at the end of 2024. Because S&P 500 firms command substantial resources and public attention, this sampling frame provides a consequential setting in which to examine stakeholder-aligned advocacy giving. Since the channel-choice question is only meaningful for firms with a corporate foundation, I identify S&P 500 firms with

corporate foundations using two complementary approaches: (1) name-based matching (see also e.g., Bertrand et al., 2021) between firm names (and U.S. subsidiary names) and corporate-sponsored foundations in Foundation Directory, and (2) contributor-based identification using IRS Form 990-PF Schedule B, applying the definition that a corporate foundation receives the majority of its resources from the sponsoring firm (Gehring, 2021, p. 259). Combining these approaches yields 269 S&P 500 firms associated with 363 foundations¹³, of which 221 firms have digitally available foundation grantmaking data for 2018-2024. The firm names used in these searches include all U.S. subsidiary names of the 500 companies in WRDS Company Subsidiary Data (2018-2024). Form 990 documents in XML format come from the IRS and ProPublica Nonprofit Explorer.

I then assemble firm-nonprofit-year donation records from two sources. Foundation giving comes from the firms' foundation Form 990-PF filings for 2018-2024. Direct giving comes from Nexis Donation Records, which compiles recipient-reported donations; I search by firm and major subsidiary names¹⁴ and classify a donation as direct when it is not observed in the firm's foundation filings for the corresponding year. To link recipients across datasets, I identify their employer identification numbers (EINs) using an algorithmic match on nonprofit name and location against the IRS exempt organization registry¹⁵; on a held-out validation sample, this procedure achieves 98% precision and 90% recall.

¹³ This is comparable to Ofer (2025), who found around 60% of the S&P 500 firms in 2019 to have at least one foundation.

¹⁴ Here I use the major subsidiaries shown on the parent firms' profiles in Gale Business: Insights.

¹⁵ This matching algorithm combines Jaro–Winkler distance (JW), Length-JW, Weighted Jaccard (IDF), Ordered WJ, plus soft address signals against all nonprofit entities in the Exempt Organizations Business Master File Extract (EO BMF) released in August 2022 and April 2024.

This process yields 231,312 firm-nonprofit-year giving relations involving 221 firms and 109,264 unique nonprofits (215,485 foundation-giving observations and 14,797 direct-giving observations). Following Seo (2025), I classify a record as advocacy giving when the recipient nonprofit's primary purpose is advocacy based on National Taxonomy of Exempt Entities (NTEE) codes¹⁶. Advocacy recipients account for roughly 3% of all giving relations, producing 7,348 firm-nonprofit-year observations involving 195 firms and 2,744 unique advocacy nonprofits. After dropping observations with missing data and fixed-effect categories that perfectly predict channel choice, the outcome-stage sample used for H2-H4 contains 4,459 observed advocacy giving relations between 99 firms and 1,632 unique advocacy nonprofits over 2018-2024. To test H1, I construct an expanded risk set by pairing these firms with advocacy nonprofits that appear as recipients for any of the 195 firms that I identified as advocacy givers, yielding 221,672 firm-nonprofit-year observations for the donation-decision analysis.

To characterize recipients, firms, and local political environments, I merge several auxiliary data sources using recipient EINs, firm identifiers, state location, and year. Recipient financials, age, and mission statements come from National Center for Charitable Statistics (NCCS) Core Files and ProPublica. The ideology classifier uses nonprofits' Form 990/990-EZ mission statements and a labeled reference corpus of House and Senate speeches from the 112th-117th Congress (Aroyehun et al., 2025). Data on state political environments come from the National Conference of State Legislatures (annual partisan composition) and the MIT Election Data and Science Lab (presidential returns), with Ballotpedia used

¹⁶ This includes R (civil rights, social action, advocacy) as a major code, as well as 01 (alliances and advocacy) and 05 (public policy analysis) as subcodes.

for Nebraska's officially nonpartisan legislature. Firm employee partisanship comes from Kagan, Frake, and Hurst (2025), firm controversy measures come from LSEG, and firm financials come from Compustat.

Measures and Empirical Design

The theory implies a sequential empirical design. Firms first decide whether to support a given advocacy nonprofit (H1). Conditional on giving, they then decide how visible that support will be by choosing between the more transparent foundation channel and the less visible direct channel (H2-H4). I therefore use two related dependent variables and two related estimators: a stand-alone probit model for the donation decision, and a Heckman probit selection model for channel choice in which the selection equation is the same donation-decision model used to test H1.

Dependent variables. The unit of analysis is the firm-advocacy nonprofit-year dyad. For H1, the dependent variable *observed giving* equals 1 if the firm is observed to have given to the advocacy nonprofit in that year through any channel and 0 otherwise. For H2-H4, I operationalize visibility management with a binary channel-choice indicator. I refer to this outcome as *low-visibility channel choice*, coded 1 when the support is observed as a direct corporate gift and 0 when it is routed through the corporate foundation.

Key explanatory variables. To measure *recipient ideology*, I follow Han, Ho, and Xia (2023) and infer ideology from text using a Bayesian classifier trained on U.S. Congressional speech, with implementation details reported in the Appendix C. Applied to each nonprofit's mission statement from Form 990/990-EZ, the classifier yields a continuous conservatism score, with higher values indicating

a language more resembling Republican speech. I rescale the measure to the $[-1,1]$ range so that 0 means ideologically neutral or moderate:

$$\text{nonprofit ideology} = 2P(\text{republican} | \text{mission } i) - 1$$

Firm ideology is measured as the proportion of a company's employees who are Republican out of those affiliated with either major party, with higher values indicating a more conservative employee base. I use the imputed two-party measure from Kagan et al. (2025). All sample firms are matched to employers in their data by name. *Recipient-employee alignment* is then defined as the closeness between the recipient's ideology and the firm's employee ideology, so higher values indicate greater ideological congruence. This is the focal explanatory variable for H1.

$$\text{recipient-employee alignment} = 1 - |\text{nonprofit ideology} - \text{firm ideology}|$$

To capture the recipient's local political climate, I use the partisan composition of the recipient's state legislature. Specifically, I calculate annual state conservatism as the difference between Republican and Democratic legislators divided by the total number of Republican and Democratic legislators across both chambers. Higher values indicate a more conservative state legislature. I lag this measure by one year to capture the ex-ante local political environment managers can reasonably observe when making channel decisions. *Recipient-local political misalignment* is then measured as the ideological distance between the recipient and this lagged local political climate; higher values indicate that the recipient is more out of step with its local political environment. This is the focal explanatory variable for H2.

recipient-local political misalignment

$$= |\text{nonprofit ideology} - \text{local political climate}|$$

Recipient size is measured as the nonprofit's total annual revenue. *Firm controversy exposure* is measured using the LSEG ESG Controversies Score, but reverse-coded so that higher values mean higher contemporary exposure to social, environmental, and governance controversy.

Controls and exclusion restrictions. I control for *recipient age*, measured as years since the recipient received tax-exempt status. I also include recipient ideology, recipient-employee alignment, recipient size, and firm controversy exposure as covariates as appropriate across the two stages. As exclusion restrictions used only in the selection equation, I measure *recipient fundraising capacity* as total fundraising expense and *firm resources* as return on assets (Margolis & Walsh, 2003; Okten & Weisbrod, 2000). These variables should affect the likelihood that a firm donates to a nonprofit, but not whether that support is routed through the foundation or direct channel. For interpretability and coefficient comparability, I z-standardize all continuous variables before estimation.

Model Specification and Estimation. To test H1, I estimate a probit model on the expanded risk set:

$$\begin{aligned} \text{Pr (Observed giving}_{ijt} = 1) \\ = \Phi(\beta_1 \text{Recipient-Employee Alignment}_{ijt} + X_{ijt}\gamma + \alpha_j + \alpha_s + \alpha_t \\ + \alpha_c) \end{aligned}$$

Here, i indexes nonprofits, j firms, and t years. X_{ijt} includes recipient-local political misalignment, firm controversy exposure, recipient conservatism,

recipient size, recipient age, recipient fundraising capacity, and firm resources. The models include firm fixed effects, recipient-state fixed effects, year fixed effects, and issue-area fixed effects (based on NTEE major category). Standard errors are clustered at the firm level. H1 predicts $\beta_1 > 0$.

To test H2-H4, I estimate a Heckman probit selection model because channel choice is observed only when a donation occurs. The selection equation is identical to the donation-decision model above, i.e., the same model used to test H1. The outcome equation models low-visibility channel choice among observed donations:

$$\begin{aligned} \text{Pr (Lower-visibility direct giving}_{ijt} = 1) \\ = \Phi(\beta_2 \text{recipient local political misalignment}_{ijt} \\ + \beta_3 \text{recipient local political misalignment}_{ijt} \times \text{size}_{it} \\ + \beta_4 \text{recipient local political misalignment}_{ijt} \\ \times \text{controversy exposure}_{jt} + \beta_5 \text{size}_{it} + \beta_6 \text{controversy exposure}_{jt} \\ + Y_{ijt} \gamma^* + \alpha_j^* + \alpha_s^* + \alpha_t^* + \alpha_c^*) \end{aligned}$$

Y_{ijt} includes recipient-employee alignment, recipient conservatism, and recipient age. I first estimate the main effect of recipient-local political misalignment to test H2. I then add interactions with recipient size and firm controversy exposure to test H3 and H4. The outcome and selection equations are estimated jointly through full-information maximum likelihood (Clougherty, Duso, & Muck, 2016). Because the selection equation is the same as the H1 model, I report its stand-alone coefficients once in Table 3.2 and then only the

Heckman selection correction in Table 3.4 through the auxiliary parameter $\text{atanh}(\rho)$.

Observed giving is rare in the expanded risk set because the latter contains all advocacy recipients identified for all the 195 firms found to have advocacy giving. To ease convergence in the Heckman estimations, I retain all observed giving ties and randomly sample non-ties within firm $\times$ state $\times$ year $\times$ issue strata at a fixed ratio¹⁷, then apply inverse-probability weights to recover the underlying risk-set distribution. This yields a weighted selection sample of 21,110 observations in the Heckman models while preserving the full outcome sample of 4,459 observed donations.

Results

Because the donation-decision models and the channel-choice models use different analytic samples by construction, I report descriptive statistics separately for each stage: Table 3.1 describes the expanded risk-set sample used to test H1, and Table 3.3 describes the observed-donation sample used to test H2-H4. Across both samples, pairwise correlations among the regressors are moderate. I therefore calculate VIF diagnostics for all estimated models; excluding fixed effects, all substantive regressors fall below conventional thresholds, suggesting that multicollinearity is unlikely to have driven the results.

¹⁷ I report results using 20 $\times$ as many zeros as ones in selection. But substantive conclusions do not depend on the sampling ratio.

Table 3.1. Descriptive Statistics and Correlations (Hypothesis 1)

Variable	Mean	SD	(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)
1) Observed Giving	0.02	0.14	1.00								
2) Recipient-Employee Alignment	0.63	0.14	0.01	1.00							
3) Recipient-Local Political Misalignment	0.64	0.40	-0.01	-0.21	1.00						
4) Recipient Conservatism	-0.76	0.43	0.00	0.41	-0.02	1.00					
5) Recipient Size	15.31	58.37	0.02	0.01	-0.02	0.01	1.00				
6) Recipient Age	26.69	17.58	0.02	0.00	0.00	0.03	0.15	1.00			
7) Recipient Fundraising	0.71	2.34	0.04	-0.02	-0.08	0.05	0.39	0.27	1.00		
8) Firm Resource	0.06	0.07	-0.01	0.09	0.00	0.00	0.00	0.00	0.00	1.00	
9) Firm Controversy Exposure	0.37	0.37	0.06	0.13	-0.01	0.00	0.00	-0.01	0.00	-0.07	1.00

Notes: n = 221,672. Absolute financial measurements are in 1,000,000 dollars.

H1: Employee Ideology and the Donation Decision

Table 3.2 reports the probit estimates for the likelihood of giving to an advocacy nonprofit through any channel. Model 1 includes only controls. Consistent with prior work, larger, older, and better-fundraised nonprofits ($\beta = 0.0539, p < 0.001$) are more likely to receive support (Okten & Weisbrod, 2000), and firms with greater resources are more likely to give ($\beta = 0.141, p = 0.015$) (Margolis & Walsh, 2003). Model 2 adds the focal explanatory variable for H1 and shows that recipient-employee alignment is positively associated with the likelihood of giving ($\beta = 0.0260, p = 0.013$), supporting H1.

Two additional patterns are worth noting. First, even net of employee alignment and the full set of fixed effects, firms are more likely to support more liberal advocacy nonprofits, as indicated by the negative coefficient on recipient conservatism ($\beta = -0.0177, p = 0.043$). This pattern is consistent with evidence that conservative corporate activism remains comparatively rare (Hambrick & Wowak, 2025). Second, recipient-local political misalignment is weakly positive in Model 2 ($\beta = 0.0161, p = 0.081$), suggesting that once employee alignment is accounted for, firms do not systematically avoid recipients that are locally out of step with their political environments. The core finding for H1, however, is that the probability of giving tracks the ideological fit between the recipient and the firm's employees.

Table 3.2. Probit Maximum Likelihood Estimation: Regressing Any Observed Corporate Philanthropy on Recipient Sociopolitical Ideology, 2018-2024

	(1) Control	(2) H1
Recipient-Employee Alignment		0.0260* (0.0105)
Recipient-Local Political Misalignment	0.00571 (0.00854)	0.0161+ (0.00925)
Firm Controversy Exposure	-0.0708 (0.0547)	-0.0708 (0.0547)
Recipient Conservatism	-0.0177* (0.00874)	-0.0288** (0.0103)
Recipient Size	0.0168** (0.00602)	0.0162** (0.00593)
Recipient Age	0.0239+ (0.0125)	0.0237+ (0.0125)
Firm Resource	0.141* (0.0580)	0.141* (0.0580)
Recipient Fundraising	0.0539** (0.00789)	0.0546** (0.00785)
Constant	-1.020*** (0.162)	-1.017*** (0.162)
Firm FE	Yes	Yes
Recipient State FE	Yes	Yes
Year FE	Yes	Yes
Issue FE	Yes	Yes
Cluster-Robust SE	Firm	Firm
N	221672	221672
Number of Firms	99	99
Pseudo R ²	0.215	0.215
Log likelihood	-17144.6	-17142.0

Notes: Robust standard errors clustered by firm in parentheses. + p < 0.10, * p < 0.05, ** p < 0.01, *** p < 0.001.

H2-H4: Local Political Misalignment and Low-Visibility Channel Choice

Table 3.3 describes the observed-donation sample used for the channel-choice models; in this sample, 9% of advocacy donations are made through the direct channel. Consistent with prior studies suggesting that conservative sociopolitical activism is rare (Nair & Mooijman, 2025), the vast majority of advocacy recipients observed in my sample also lean liberal. Table 3.4 reports the outcome-stage coefficients from the Heckman probit models. The selection equation is the same donation-decision model used for H1; particularly, identification comes from recipient fundraising capacity and firm resources.

Table 3.3. Descriptive Statistics and Correlations (Hypothesis 2-4)

Variable	Mean	SD	(1)	(2)	(3)	(4)	(5)	(6)	(7)
1) Low-Visibility Channel Choice	0.09	0.29	1.00						
2) Recipient-Local Political Misalignment	0.62	0.40	0.01	1.00					
3) Recipient Size	23.68	67.25	-0.02	-0.04	1.00				
4) Firm Controversy Exposure	0.52	0.39	-0.05	0.03	-0.08	1.00			
5) Recipient Conservatism	-0.77	0.43	0.03	0.09	0.00	0.02	1.00		
6) Recipient Age	28.88	18.06	0.05	-0.01	0.16	-0.06	0.01	1.00	
7) Recipient-Employee Alignment	0.63	0.13	0.07	-0.23	0.01	0.08	0.41	-0.03	1.00

Notes: $n = 4,459$. Absolute financial measurements are in 1,000,000 dollars.

Model 1 includes only controls. Across the table, several control patterns are stable. Firms with greater controversy exposure are generally more likely to use the direct channel (Model 1: $\beta = 0.238$, $p = 0.042$). This suggests that firms facing existing social pressures are more careful in advocacy giving, which could further jeopardize their reputation (McDonnell & King, 2013; Shanor et al., 2021). On the recipient side, smaller ($\beta = -0.126$, $p = 0.001$) but older ($\beta = 0.125$, $p = 0.025$) nonprofits are more likely to be given directly, which might have to do with direct giving being more casual, in-situ and routinized (Brakman Reiser & Dean, 2023;

Marquis & Lee, 2013). Recipient conservatism itself does not systematically predict channel choice.

Model 2 introduces the focal explanatory variable for H2. Recipient-local political misalignment is positively associated with low-visibility channel choice ($\beta = 0.101$, $p = 0.030$). Thus, conditional on giving, firms are more likely to route support through the less visible channel when the recipient is more out of step with its local political environment. This pattern supports H2.

Models 3 and 4 examine the proposed boundary conditions. Model 3 shows that the positive effect of recipient-local political misalignment becomes substantially stronger as recipient size increases ($\beta = 0.217$, $p < 0.001$), supporting H3. Model 4 shows a similar amplification for firm controversy exposure ($\beta = 0.120$, $p = 0.001$), supporting H4. Both interaction effects remain positive and significant in the fully specified Model 5. Taken together, these models indicate that firms are especially likely to shift locally misaligned advocacy support into the lower-visibility direct channel when the recipient is more salient or the donor firm is more vulnerable to further backlash.

Table 3.4. Heckman Maximum Likelihood Estimation: Regressing Low Visibility of Corporate Philanthropy on Recipient Sociopolitical Ideology, 2018-2024

	(1) Control	(2) Main	(3) × Size	(4) × Controversy	(5) Full
Recipient-Local Political Misalignment		0.101* (0.0468)	0.0954* (0.0444)	0.0884* (0.0436)	0.0820* (0.0403)
Recipient Size	-0.126*** (0.0392)	-0.129*** (0.0390)	-0.248*** (0.0678)	-0.129*** (0.0393)	-0.259*** (0.0681)
Firm Controversy Exposure	0.238* (0.117)	0.238* (0.118)	0.221* (0.112)	0.232* (0.118)	0.212* (0.112)
Recipient-Employee Alignment	0.0440 (0.0355)	0.0896* (0.0390)	0.0930* (0.0365)	0.0935* (0.0400)	0.0942* (0.0371)
Recipient Conservatism	0.0371 (0.0325)	-0.00182 (0.0382)	-0.0238 (0.0372)	-0.0100 (0.0398)	-0.0322 (0.0384)
Recipient Age	0.125* (0.0560)	0.116* (0.0562)	0.0902* (0.0461)	0.125* (0.0573)	0.0945* (0.0469)
Recipient-Local Political Misalignment × Recipient Size			0.217*** (0.0611)		0.227*** (0.0603)
Recipient-Local Political Misalignment × Firm Controversy Exposure				0.120*** (0.0363)	0.112*** (0.0314)
Constant	-3.042*** (0.867)	-3.023*** (0.857)	-2.743*** (0.724)	-3.191*** (0.914)	-2.846*** (0.769)
atanh(p) (selection corr.)	-0.475 (0.487)	-0.471 (0.490)	-0.698* (0.347)	-0.439 (0.514)	-0.709* (0.365)
Firm FE	Yes	Yes	Yes	Yes	Yes
Recipient State FE	Yes	Yes	Yes	Yes	Yes
Year FE	Yes	Yes	Yes	Yes	Yes
Issue FE	Yes	Yes	Yes	Yes	Yes
Cluster-Robust SE	Firm	Firm	Firm	Firm	Firm
N (Outcome)	4459	4459	4459	4459	4459
N (Selection)	21110	21110	21110	21110	21110
Number of Firms	99	99	99	99	99
Log likelihood	-9802.9	-9800.5	-9791.3	-9794.4	-9784.7

Notes: Robust standard errors clustered by firm in parentheses. + p < 0.10, * p < 0.05, ** p < 0.01, *** p < 0.001.

Marginal Effects

The estimated effects are also substantial. Based on the fully specified Heckman model (Table 3.4 Model 5), a two-standard-deviation increase in recipient-local political misalignment, from one standard deviation below the mean to one standard deviation above it, increases the predicted probability of low-visibility channel choice by about 2.0 percent, conditional on making a donation. Given a baseline probability of roughly 12%, this corresponds to an increase of about 16%-17% in the likelihood of using the direct channel.

The conditional effects are much larger under the two hypothesized boundary conditions. For large recipients, the same change in local misalignment raises the predicted probability of direct giving by about 6.7 percent, whereas for small recipients it lowers it by about 4.7 percent. Likewise, for highly controversial firms, the same increase in local misalignment raises the predicted probability of direct giving by about 6.0 percent, whereas firms with low controversy exposure show little response.

Figure 3.1 visualizes these same interaction effects. Based on Table 3.4 Model 3, Figure 3.1a shows that, while small nonprofits are in general more likely to be given to directly, as the political misalignment increases, large nonprofits are increasingly more likely to be discreetly given to, with the likelihood surpassing small recipients under high levels of recipient local misalignment.

In Figure 3.1b that is based on Table 3.4 Model 4, at low levels of local misalignment, there's no difference in likelihood of low-visibility channel choice for firms with high or low existing exposure to social controversy. However, as the local misalignment increases, the difference shows up: highly controversial firms

systematically are more likely to route an advocacy support through the low-visibility channel, while firms with little controversy seem mostly unaffected by recipient-local political misalignment. The growing disparity in likelihood of low-visibility channel choice highlights again how discretion becomes increasingly favorable for firms afraid of further bad optics. Taken together, these results highlight the economically meaningful role of local political considerations in shaping how visibly firms choose to support advocacy recipients.

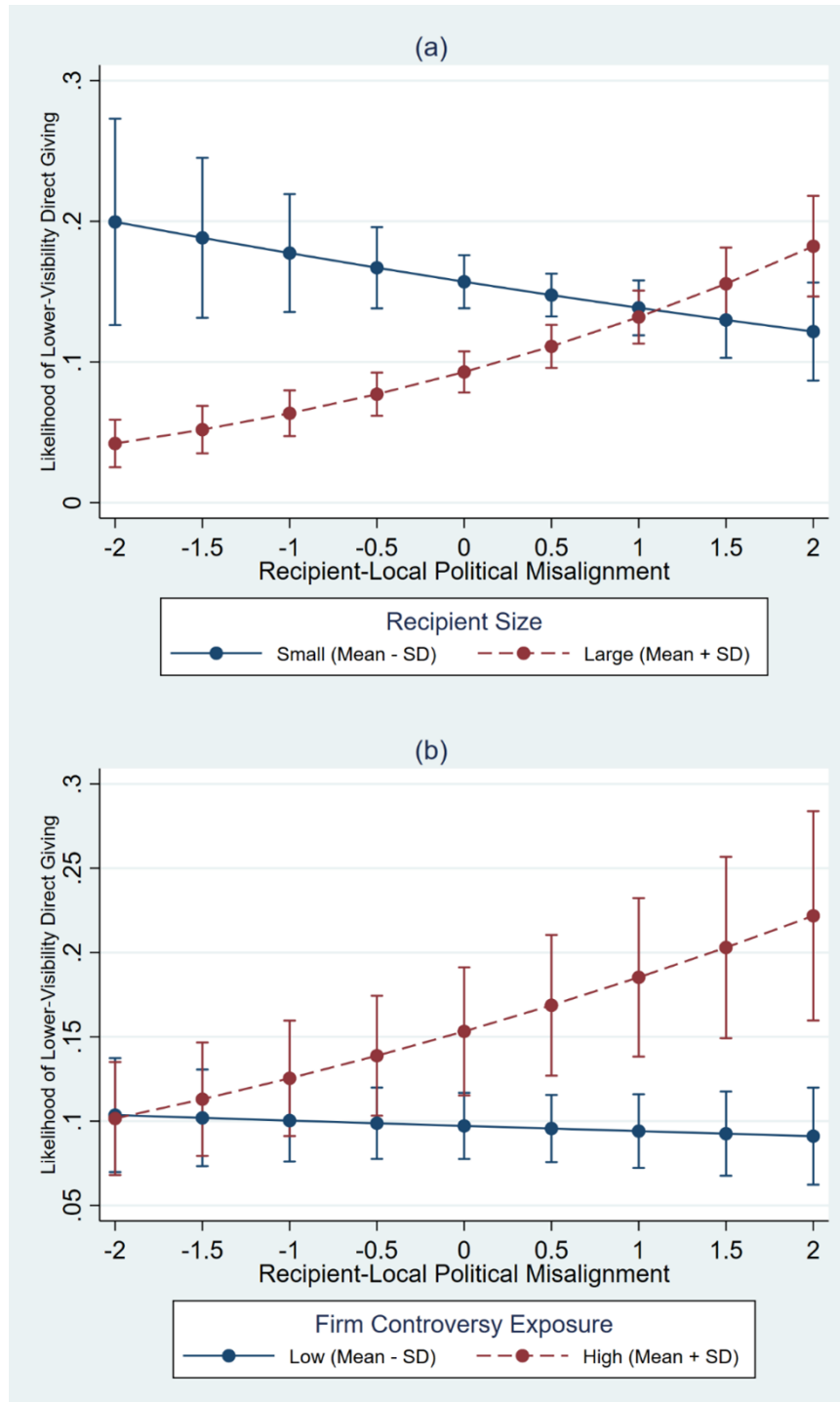


Figure 3.1. Marginal Effects of Advocacy Nonprofit's Local Political Misalignment on Likelihood of Lower-Visibility Corporate Direct Giving

Discussion

Corporate giving is commonly understood as a way for firms to build stakeholder goodwill. Advocacy giving, however, creates cross-pressures: the same donation can generate approval among some audiences while provoking backlash from others. This makes continued giving in politically hostile environments puzzling if philanthropy is assumed to be uniformly and reputationally beneficial. In this chapter, I highlight visibility as a strategic dimension of corporate giving. Firms manage stakeholder conflict not only through what they support, but also through how visible that support is to different audiences.

I argue first that advocacy giving is shaped by employee preferences, such that firms are more inclined to support recipients whose ideological orientation aligns with that of their workforce. At the same time, firms operate across politically heterogeneous environments in which external stakeholders may judge the same donation very differently. Under these conditions, firms can preserve support for contested causes while limiting political exposure by lowering the visibility of particular giving ties. This need for discretion is greatest when a recipient's ideology is misaligned with its local political environment, and it should be amplified when the tie is more likely to attract attention or scrutiny. I therefore propose that low-visibility giving will be especially likely when the advocacy recipient is larger and when the firm is more controversial.

Using data on S&P 500 firms' giving to advocacy nonprofits in the United States between 2018 and 2024, I show that direct versus foundation giving serves as a structural lever for this form of visibility management. While advocacy giving

of firms mirror their employees' ideology, firms shift toward direct giving when an advocacy recipient is politically out of step with its local environment, and this relationship is stronger for larger recipients and more controversial firms. Taken together, the findings show that firms actively manage the visibility of philanthropic ties in response to how those ties are likely to be interpreted by external audiences in local political contexts.

Contributions

This chapter makes several contributions to the corporate giving and the larger CSR literature. First, the chapter shows that visibility is a strategic design dimension of corporate philanthropy (Douglas Beets & Beets, 2019; H. Wang et al., 2021). Traditional corporate giving research often treats philanthropy as broadly positive and reputationally beneficial (Luo et al., 2018). Here, when giving in politically contested domains, firms face sanction risk and therefore use low-visibility channel choice as a nonmarket strategy (Bertrand et al., 2020; Marquis et al., 2016; Shanor et al., 2021). Thus, firms manage conflicting stakeholder demands not only by deciding whether to support a cause, but by choosing a giving channel that calibrates the visibility of that support. In this regard, this chapter takes a step further from H. Wang et al. (2021) by shifting attention from quiet giving as silence after the fact to low-visibility channel choice as an ex ante organizational response to politically heterogeneous audiences.

This contribution also reframes the role of corporate foundations in CSR impression management. Organizational scholarship has long recognized that CSR initiatives can serve symbolic and impression-management purposes (Bansal & Clelland, 2004; Carlos & Lewis, 2018; McDonnell & King, 2013;

Westphal, 2023). Distinguishing direct from foundation giving clarifies why foundations may be especially useful for front-stage CSR: foundation grants are structured to be comparatively transparent and brandable, while firms can simultaneously route other gifts through direct channels that are less subject to routine disclosure (Douglas Beets & Beets, 2019; Minefee et al., 2015, p. 66; Morris & Bartkus, 2015). This separation suggests that foundation giving may function, in part, as a visible CSR “shop window” that shapes stakeholder perceptions even when it does not represent the full philanthropic portfolio.

Second, this chapter shifts attention from the donor–recipient dyad to the recipient’s stakeholder environment as a driver of philanthropic strategy. Existing work emphasizes corporate–community relations and local embeddedness, typically from the donor firm’s side (T. J. Choi & Deutsch, 2023; Marquis & Tilcsik, 2016). I instead foreground the recipient nonprofit’s local political climate, arguing that local audiences surrounding the beneficiary shape the reputational risk of visible support. This perspective broadens stakeholder theorizing in corporate social practices by incorporating third-party audiences beyond the benefactor–beneficiary relationship (Gautier & Pache, 2015). It highlights that both parties’ social contexts condition the value, and potential liabilities, of the symbolic capital generated through giving (Liket & Simaens, 2015; Shymko et al., 2023).

Third, this study advances work connecting ideology and CSR by showing that stakeholder ideologies shape how firms give. Prior research has simply equated liberalism as “pro-CSR” and conservatism as shareholder value maximization and resistance to CSR (e.g., DesJardine, Shi, & Westphal, 2024; Gupta et al., 2017). However, different ideological leanings might also mean different kinds of

CSR. Conservative values, with their emphasis on community and faith, also motivate targeted giving (T. J. Choi & Deutsch, 2023; Seo, 2021). By focusing on the visibility strategy, this chapter reframes corporate philanthropy as a tool for managing ideological faultlines in stakeholder environments (Mohliver et al., 2023; Seo, 2025), rather than a uniformly public signal of corporate liberalism.

More broadly, my findings contribute to conversations about nonmarket strategy and stakeholder management in polarized environments (Gupta et al., 2025; Homroy & Gangopadhyay, 2025; Wowak & Busenbark, 2024). I highlight disclosure design and channel structure as consequential strategic levers of large firms. By building philanthropic brands through corporate foundations while routing ideologically sensitive gifts through less visible channels, firms get to mitigate backlash, manage internal–external audience tensions, and sustain legitimacy across divided stakeholder publics (Bhagwat et al., 2020; Hambrick & Wowak, 2021).

Limitations and Future Research

Prior U.S. research rarely distinguishes direct from foundation giving, often treating foundation grants as a proxy for corporate philanthropy and, by extension, assuming that giving is inherently public and signal-like. By separating the two channels and combining foundation filings with recipient-reported donations, this study shows that firms' philanthropic portfolios contain systematic variation in disclosure. However, conflicting sociopolitical preferences of different stakeholders might not be the only reason firms need to toggle between different channels. In particular, the same logic might not apply to service nonprofits with weaker ideological coding. Low-visibility channel choice might serve other

purposes, including covert political mobilization (Bertrand et al., 2021), R&D-oriented collaborations (Bereskin, Campbell, & Hsu, 2016), and managerial agency (Ofer, 2025). Nonprofits might also have agency in deciding how they want to be supported (McDonnell et al., 2021; Odziemkowska, 2022b).

While the theory developed here concerns visibility management in corporate giving, the empirical setting is specific to the U.S. disclosure regime. In other jurisdictions, firms may not face the same transparency distinction between direct and foundation giving, and they may instead manage visibility through other arrangements in their cross-sector relationships (Odzienkowska, 2022a; H. Wang et al., 2021). The relevant unit of “local political climate” may also vary with the structure and power of subnational political actors. These institutional contingencies lie beyond the scope of this chapter. Still, wherever firms face political sanctions or stakeholder backlash over ties to certain nonprofits, similar incentives to reduce the visibility of those ties should arise (Minefee & Yue, 2025).

In conclusion, this chapter examines how recipient–local political misalignment shapes firms’ use of low-visibility giving channels in advocacy philanthropy. I argue that, although firms are motivated by employee preferences to support certain advocacy nonprofits, they may reduce the visibility of that support when local external stakeholders are likely to impose political costs. By bringing insights from corporate political activity and sociopolitical activism into the corporate giving literature, the chapter identifies low-visibility channel choice as a nonmarket strategy for sustaining contested advocacy giving under conflicting stakeholder demands and anticipated external sanctions. In doing so, it lays a foundation for future research on visibility management in corporate philanthropy.

GENERAL DISCUSSION

This dissertation examines strategy in the context of contested social issues. It begins by reviewing and integrating scholarship across strategy, organization theory, social movement theory, and nonprofit management to develop a broader understanding of how organizations navigate contested issues. Firms, social movement organizations, and third-sector organizations may each be targets of contestation, active contestants in their own right, or organizations that choose to engage with issues in which they were not initially implicated. Despite differences in strategic objectives, the review identifies common patterns in how diverse organizations strategically navigate contested social issues. In doing so, it invites broader inquiry into organization–issue relationships across organizational forms and the strategic positions organizations occupy within contested issue arenas.

Building on classic social movement theory, the dissertation then examines how contestation affects the performance of issue-driven organizations. When a focal issue comes under threat, incumbents and their constituents often mobilize in opposition. I theorize and show that, under such conditions, supporters of the focal side also evaluate the efficacy of the organizations that represent their stance. Under conditions of urgency, specialist and short-term-oriented organizations become more attractive vehicles for counteraction, whereas generalist and long-term-oriented organizations perform worse as opposing movement threat intensifies. These findings contribute to social movement theory, organization theory and deepen our understanding of resource mobilization in contested issue fields.

The dissertation then turns to organizations outside the immediate arena of contestation. These organizations are not directly implicated by a contested issue, yet they may engage strategically. I focus specifically on corporate philanthropy, where firms can support solutions to social problems to strengthen stakeholder relations. When issues are contested, however, such support always risks provoking backlash from at least some stakeholders. I propose and provide evidence that firms manage this tension by publicly displaying “appropriate” giving aligned with the preferences of external stakeholders, while channeling support for employees’ preferences discreetly. These findings have clear implications for stakeholder management, nonmarket strategy and CSR research, which has often treated philanthropy as unambiguously beneficial and therefore naturally public. They also advance our understanding of the strategic role of public-facing, corporate-sponsored philanthropic foundations in managing conflicting stakeholder demands.

Taken together, the dissertation advances a framework for analyzing organizations in and around contested issues. Rather than portraying firms simply as seizing opportunities or avoiding threats, it centers the interactions among diverse organizational actors and the consequences of those interactions for each. It also recognizes that issue engagement is often driven by complex motives, including ideological commitments and collective identities, such that organizational outcomes may extend beyond financial performance alone. By integrating perspectives across disciplines, the dissertation lays the foundation for a more accurate understanding of contested issue arenas, the positions organizations occupy within them, and the strategies available to them.

DISCUSIÓN GENERAL

Esta tesis examina la estrategia en el contexto de cuestiones sociales controvertidas. Comienza revisando e integrando trabajos procedentes de la estrategia, la teoría de la organización, la teoría de los movimientos sociales y la gestión de organizaciones sin ánimo de lucro, con el fin de desarrollar una comprensión más amplia de cómo las organizaciones navegan cuestiones controvertidas. Las empresas, las organizaciones de movimientos sociales y las organizaciones del tercer sector pueden ser, cada una de ellas, objeto de contestación, contendientes activos por derecho propio u organizaciones que deciden implicarse en cuestiones en las que inicialmente no estaban involucradas. A pesar de las diferencias en sus objetivos estratégicos, la revisión identifica patrones comunes en la forma en que organizaciones diversas navegan estratégicamente cuestiones sociales controvertidas. Al hacerlo, abre la puerta a una investigación más amplia sobre las relaciones entre organizaciones y cuestiones, a través de distintas formas organizativas y de las posiciones estratégicas que las organizaciones ocupan dentro de las arenas de cuestiones controvertidas.

A partir de la teoría clásica de los movimientos sociales, la tesis examina después cómo la contestación afecta al desempeño de las organizaciones impulsadas por una cuestión. Cuando una cuestión focal se ve amenazada, los actores establecidos y sus públicos suelen movilizarse en oposición. Teorizo y muestro que, en tales condiciones, los partidarios del lado focal también evalúan la eficacia de las organizaciones que representan su postura. En condiciones de

urgencia, las organizaciones especializadas y orientadas al corto plazo se convierten en vehículos más atractivos para la contraacción, mientras que las organizaciones generalistas y orientadas al largo plazo obtienen peores resultados a medida que se intensifica la amenaza del movimiento opositor. Estos hallazgos contribuyen a la teoría de los movimientos sociales, a la teoría de la organización y profundizan nuestra comprensión de la movilización de recursos en campos de cuestiones controvertidas.

A continuación, la tesis se centra en organizaciones situadas fuera de la arena inmediata de contestación. Estas organizaciones no están directamente implicadas por una cuestión controvertida, pero aun así pueden implicarse estratégicamente. Me centro específicamente en la filantropía corporativa, donde las empresas pueden apoyar soluciones a problemas sociales para fortalecer sus relaciones con los grupos de interés. Sin embargo, cuando las cuestiones son controvertidas, ese apoyo siempre entraña el riesgo de provocar reacciones adversas por parte de al menos algunos grupos de interés. Propongo y apporto evidencia de que las empresas gestionan esta tensión exhibiendo públicamente donaciones “apropiadas” alineadas con las preferencias de los grupos de interés externos, al tiempo que canalizan de manera discreta el apoyo a las preferencias de sus empleados. Estos hallazgos tienen implicaciones claras para la gestión de los grupos de interés, la estrategia no de mercado y la investigación sobre responsabilidad social corporativa, que con frecuencia ha tratado la filantropía como algo inequívocamente beneficioso y, por tanto, naturalmente público. También amplían nuestra comprensión del papel estratégico de las fundaciones

filantrópicas corporativas, visibles al público y patrocinadas por empresas, en la gestión de demandas conflictivas de los grupos de interés.

En conjunto, la tesis desarrolla un marco para analizar a las organizaciones dentro y en torno a cuestiones controvertidas. En lugar de presentar a las empresas simplemente como actores que aprovechan oportunidades o evitan amenazas, sitúa en el centro las interacciones entre diversos actores organizativos y las consecuencias de esas interacciones para cada uno de ellos. Asimismo, reconoce que la implicación en una cuestión suele estar impulsada por motivaciones complejas, incluidos compromisos ideológicos e identidades colectivas, de modo que los resultados organizativos pueden ir más allá del mero desempeño financiero. Al integrar perspectivas de distintas disciplinas, la tesis sienta las bases para una comprensión más precisa de las arenas de cuestiones controvertidas, de las posiciones que las organizaciones ocupan en ellas y de las estrategias que tienen a su disposición.

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APPENDIX A. WEB OF SCIENCE QUERY FOR LITERATURE REVIEW

I include papers only if they analyze organizational strategy/decision/performance under contested issues. To be able to identify these papers, I intersect three blocks: contestation / contestedness, organizational actor, and strategy / decision / performance. In Web-of-Science terms, the query is specified as the following:

I first define a query for contested issues.

```
(  
  ((social OR societal OR public OR political OR moral) NEAR/1 issue*)  
  OR ((contested OR contentious OR controvers* OR polariz* OR divisiv*)  
NEAR/1 issue*)  
  OR ((contested OR contentious OR controvers* OR polariz* OR divisiv*)  
NEAR/3 (social OR societal OR public OR political OR moral OR sociopolitical))  
  OR (social NEAR/1 activis*) OR (stakeholder* NEAR/3 activis*) OR  
(corporate NEAR/1 activis*) OR (sociopolitical NEAR/1 activis*)  
  OR protest* OR boycott* OR (social NEAR/1 movement*) OR advocacy  
  OR (public NEAR/1 politics) OR (private NEAR/1 politics)  
  OR (contentious NEAR/1 politics)  
  OR counterposition*  
)
```

These keywords can show in either title (TI), abstract (AB) or author keywords (AK), so I create these sets:

#1a = TI=([contestedness block above])

#1b = AB=([contestedness block above])

#1c = AK=([contestedness block above])

#1 = #1a OR #1b OR #1c

Then I look for references to organizations.

#2 = TS=(

organi?ation* OR firm* OR corporation* OR compan* OR business* OR
enterprise*

OR nonprofit* OR non-profit* OR not-for-profit* OR ngo*
)

Then the paper should relate to strategy.

#3 = TS=(

strateg* OR decision* OR response* OR performance
OR nonmarket OR (non NEAR/0 market)
OR legitim* OR reput* OR collaborat* OR alliance*
OR (stance NEAR/1 taking)
)

#4 = #1 AND #2 AND #3

#4 is the final set of papers I deem to be within scope, which I then filter through
journal scope and reading of the abstract.

APPENDIX B. NEWSPAPERS USED IN MEASURING THREAT BY STATE

State	Titles
1) AL	Anniston Star, The
2) AR	Arkansas Democrat-Gazette*
3) AZ	Arizona Daily Star, The
4) CA	Cupertino Courier, The; Daily Breeze; Daily News of Los Angeles; Davis Enterprise, The; Fresno Bee, The; Half Moon Bay Review; Long Beach Press-Telegram; Mercury News, The; Modesto Bee, The; Orange County Register, The; Press-Enterprise, The; Press Democrat, The; Sacramento Bee, The; San Diego Union-Tribune, The; San Francisco Chronicle; Sonoma Index-Tribune, The; Sunnyvale Sun; Willow Glen Resident; Los Angeles Times, The*
5) CO	Denver Post, The*; Gazette, The; Pueblo Chieftain, The
6) CT	Hartford Courant, The*; New Haven Register; News-Times, The; Record-Journal
7) DC	Washington Times, The; Washington Post, The*
8) DE	Delaware State News
9) GA	Atlanta Journal-Constitution, The*; Augusta Chronicle, The; Ledger-Enquirer; Macon Telegraph, The
10) HI	Garden Island, The; Honolulu Star-Advertiser*; Molokai Dispatch, The
11) IA	Gazette, The; Hawk Eye, The; Sioux City Journal; Telegraph Herald
12) ID	Idaho Statesman, The*; Lewiston Tribune; Post Register
13) IL	Arlington Heights Post; Barrington Courier-Review; Beacon News, The; Buffalo Grove Countryside; Chicago Sun-Times; Courier News; Daily Herald; Deerfield Review; Dispatch-Argus, The; Evanston Review; Glenview Announcements; Harrisburg Register; Herald & Review; Herald News, The; Lake County News-Sun; Lake Forester; Lake Zurich Courier; Naperville Sun, The; Northbrook Star; Pantagraph, The; Peoria Journal Star, The; Register-Mail, The; Southern Illinoisan, The; State Journal-Register, The; Chicago Tribune, The*
14) IN	Herald-Times; Journal Gazette, The; Post-Tribune, The; South Bend Tribune; Times-Mail, The; Times, The
15) KS	Chanute Tribune, The; Garden City Telegram, The; Hays Daily News, The; Manhattan Mercury, The; Ottawa Herald, The; Parsons Sun; Wichita Eagle, The*
16) KY	Lexington Herald-Leader; Owensboro Messenger-Inquirer
17) LA	Advocate, The; Town Talk, The
18) MA	Boston Herald; Daily Hampshire Gazette [30 Day Embargo]; Provincetown Banner; Recorder, The [30 Day Embargo]; Republican, The; Valley Advocate; Worcester Telegram & Gazette; Boston Globe, The*
19) MD	Capital, The; Frederick News-Post, The; Herald-Mail, The; Jewish Times; Sun, The
20) ME	Bangor Daily News; Portland Press Herald/Maine Sunday Telegram*
21) MI	Flint Journal, The; Holland Sentinel, The; Muskegon Chronicle, The
22) MN	Duluth News Tribune; St. Paul Pioneer Press; Star Tribune Newspaper of the Twin Cities*
23) MO	Kansas City Star, The; St. Louis Post-Dispatch*

Continued on next page.

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State	Titles
25) MS	Delta Democrat Times; Enterprise-Journal; Greenwood Commonwealth, The; Meridian Star, The; Sun Herald, The
26) NC	Charlotte Observer, The*; Fayetteville Observer, The; Herald-Sun, The; News & Observer, The; News & Record; StarNews; Winston-Salem Journal
27) NH	New Hampshire Union Leader/New Hampshire Sunday News*
28) NJ	Hunterdon County Democrat; Press of Atlantic City, The; Record, The; Star-Ledger, The*; Times, The
29) NM	Albuquerque Journal*; Santa Fe New Mexican, The
30) NV	Las Vegas Review-Journal*; Las Vegas Sun
31) NY	Buffalo News, The; Daily Gazette, The; New York Daily News; New York Observer, The; Post-Standard, The; Staten Island Advance; Times Union, The; Watertown Daily Times; New York Times, The*
32) OH	Akron Beacon Journal; Blade, The; Columbus Dispatch, The; Dayton Daily News; Lima News, The; Plain Dealer, The*
33) OK	Daily Ardmoreite, The; Lawton Constitution, The; Oklahoman, The*; Shawnee News-Star, The; Tulsa World
34) OR	Oregonian, The*
35) PA	Centre Daily Times; Delaware County Daily Times; Erie Times-News; Morning Call, The; Patriot-News, The; Philadelphia Daily News; Philadelphia Inquirer, The*; Pittsburgh Post-Gazette; Sentinel, The; Times Leader, The
36) RI	Providence Journal*
37) SD	American News, The; Black Hills Pioneer; Capital Journal; Daily Republic, The; Rapid City Journal, The; Watertown Public Opinion
38) TX	Austin American-Statesman; Brownsville Herald, The; Fort Worth Star-Telegram; Houston Chronicle*; Odessa American; San Antonio Express-News
39) UT	Deseret News, The*; Salt Lake Tribune, The*
40) VA	Daily News-Record; Daily Press; Richmond Times-Dispatch*; Roanoke Times, The; Virginian-Pilot, The*
41) WA	Columbian, The; News Tribune, The; Seattle Times, The*; Wenatchee World, The; Yakima Herald-Republic
42) WI	Capital Times, The; Journal Times, The; La Crosse Tribune; Milwaukee Journal Sentinel*; Wisconsin State Journal
43) WY	Star-Tribune*; Wyoming Tribune-Eagle

Notes. *Most circulated in the state according to Alliance for Audited Media (AAM), 2004-2013.

The nationally most circulated newspaper, USA Today's coverage is added onto every state's threat measurement.

The Los Angeles Times, The Washington Post, Chicago Tribune, The Town Talk, and The Boston Globe articles are sourced from ProQuest, The New York Times and USA Today from Factiva, the rest from Access World News.

APPENDIX C. MEASURING POLITICAL IDEOLOGY OF NONPROFIT ORGANIZATIONS

To measure nonprofits' political ideology, I implement a Bayesian text classifier trained on Congressional speech. The raw mission statement is cleaned using the misspelling–correction dictionary of Paxton, Velasco, and Ressler (2019). And then both the mission statements and the Congressional speeches are preprocessed with standard steps: lowercasing, tokenization, removal of English and Congress-specific stop words (procedural terms, state names, legislator surnames), and Porter stemming. As detailed below, I adapt the classifier of Han et al. (2023) to yield a continuous liberal–conservative score for each mission statement—the posterior likelihood that the text aligns with Democratic vs. Republican speech (see also Gentzkow & Shapiro, 2010; Laver, Benoit, & Garry, 2003).

Let V be the vocabulary of partisan-relevant one-word phrases (unigrams) selected from the Congressional records. It is obtained by Pearson χ^2 feature screening on party-labeled speeches; I retain the top 20% most discriminating unigrams. Following a standard bag-of-words approach, each document is represented only by the counts of tokens in V ; grammar and word order beyond the unigram are ignored.

For each party $p \in \{D, R\}$, let $C_{w,p}$ denote the number of times unigram $w \in V$ appears in speeches by party p , and $N_p = \sum_{w \in V} C_{w,p}$ be the total unigram count for party p .

For nonprofit i , let n_{wi} be the count of unigram w in its mission statement, and $L_i = \sum_{w \in V} n_{wi}$ be its unigram length that is restricted to V .

A key assumption in such textual scaling methods is that conditional on party p , tokens in a document are assumed to be generated as independent draws from a multinomial distribution over V , i.e., the canonical “naïve” assumption. It treats token occurrences as conditionally independent given p . While stylized, it yields transparent, stable estimates and has a long track record in political-text scaling.

I estimate party-specific token probabilities by Laplace-smoothed relative frequencies:

$$\hat{P}(w|p) = \frac{C_{w,p} + \alpha}{N_p + \alpha|V|}, \alpha = 1$$

This is the standard “add-one” (Laplace) smoothing used by Multinomial Naïve Bayes and prevents zero probabilities for rare or unseen tokens. Priors are set to be uninformative: $\pi_R = P(R) = \pi_D = P(D) = 0.5$.

Mission statements vary in length. To remove mechanical dependence on length, I re-scale each mission’s unigram counts to the average mission length $\bar{L}$ in my scoring sample:

$$\frac{\bar{L}}{L_i} \times n_{wi} = n_{wi}^*$$

Intuitively, this treats every mission as if it contained $\bar{L}$ tokens, preserving its composition but not its raw size. The score produced with these scaled counts is my main measure of political ideology for a nonprofit (its mission statement).

For each nonprofit i , the Republican posterior probability¹⁸ is

¹⁸ In implementation, to avoid numerical underflow, I work in log-space:

$$l_{pi} \equiv \log \pi_p + \sum_{w \in V} n_{wi}^* \log \hat{P}(w|p), p \in \{D, R\},$$

And return

$$P(R|\text{mission } i) = \frac{e^{l_{Ri}}}{e^{l_{Ri}} + e^{l_{Di}}}.$$

$$P(R|\text{mission } i) = \frac{\pi_R \prod_{w \in V} \hat{P}(w|R)^{n_{wi}^*}}{\pi_R \prod_{w \in V} \hat{P}(w|R)^{n_{wi}^*} + \pi_D \prod_{w \in V} \hat{P}(w|D)^{n_{wi}^*}}$$

I interpret this as the nonprofit recipient's political ideology. It is technically a generative classifier: I compare how likely the observed mix of words would be if spoken by a typical Republican vs. a typical Democrat speaker, then normalize to a probability in $[0, 1]$. Higher values indicate language closer to Republican speech and more conservative.

Han et al. (2023) validated the methodology using both unigrams and two-word phrases (bigrams). Unigrams capture the overall vocabulary. Bigrams capture partisan catchphrases that only emerge when two words appear together. For each mission statement, I obtain both scores and then take the average as the final ideology measure.

This is the same thing as what a MultinomialNB classifier with Laplace smoothing computes when given the mission's unigram vector and the speech-based parameter estimates.