

## RELATIONAL BUREAUCRACY: STRUCTURING RECIPROCAL RELATIONSHIPS INTO ROLES

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We describe a hybrid relational bureaucratic form with structures that embed three processes of reciprocal interrelating—relational coproduction, relational coordination, and relational leadership—into the roles of customers, workers, and managers. We show how these role-based relationships of shared goals, shared knowledge, and mutual respect foster participants' attentiveness to the situation and to one another, enabling the caring, timely, and knowledgeable responses found in the relational form, along with the scalability, replicability, and sustainability found in the bureaucratic form. Through these role-based relationships, relational bureaucracy promotes universalistic norms of caring for particular others.

Relation is reciprocity. . . . Inscrutably involved, we live in the currents of universal reciprocity (Buber, 1937: 67).

Relational or network organizations have been conceptualized as having the capacity for caring, timely, and knowledgeable responses to others because of the reciprocal relationships that connect their participants (Heimer, 1992; Powell, 1990). However, these reciprocal relationships tend to be personal rather than role based, limiting their scalability, replicability, and sustainability over time. In contrast, bureaucratic organizations have been conceptualized as having the capacity for scalability, replicability, and sustainability because of their reliance on formal structures. However, they lack the capacity for caring, timely, and knowledgeable responses to emergent situations

(Heckscher, 1994). These observations suggest difficult organizational trade-offs. And yet we know of organizations that have become both large and stable without the associated downsides. For example, Southwest Airlines—dubbed the LUV airline—managed its evolution from a small, quirky Texas airline to one of the largest airlines in the world while maintaining the reciprocal relationships that drive its performance (Gittell, 2003).

Motivated by these observations, we theorize a hybrid organizational form that is not a hodgepodge of misaligned characteristics but, rather, a logically coherent higher synthesis of the two organizational forms from which it emerges. We conceptualize a hybrid of the relational and bureaucratic forms, with formal structures that support three processes of reciprocal interrelating—relational coproduction between workers and customers, relational coordination between workers, and relational leadership between workers and managers—each characterized by relationships of shared goals, shared knowledge, and mutual respect. Specifically, we theorize how formal structures such as hiring and training, performance measurement and rewards, job design, conflict resolution, protocols, and meetings can embed reciprocal relationships into the roles of managers, workers, and customers. Together, these role-based relationships foster participants' attentiveness to the situation and to one another, enabling caring,

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We thank guest editor Jane Dutton and the reviewers for their detailed and constructive guidance throughout the review process. We also thank participants of the MIT Institute for Work and Employment Relations Seminar, especially Lotte Bailyn, Joyce Fletcher, Ryan Hammond, Jason Jay, Tom Kochan, and Mike Piore; participants of the 2010 Wharton Conference on People and Organizations, especially Malika Banerjee, Diane Burton, Ruthanne Huising, and Holly Slay; and participants of the Copenhagen Business School Strategic Management Seminar, especially Nicholas Foss and Dana Minbaeva. We also thank Paul Adler, Niclas Erhardt, David Gil, Charles Heckscher, Paul Hess, Kate Kellogg, Seok-Woo Kwon, John Paul MacDuffie, Karlene Roberts, Edgar Schein, Ofer Sharone, and Richard Wexler for their valuable comments.

timely, and knowledgeable responses found in the relational form, as well as the scalability, replicability, and sustainability found in the bureaucratic form.

A Southwest operations agent illustrated reciprocal interrelating between workers and customers: "We treat the customer like family. . . . But that doesn't mean they are always right. They can't be abusive to us or to other customers" (Gittell, 2002b: 2). A Southwest ticket agent illustrated reciprocal interrelating between workers: "No one takes the job of another person for granted. The skycap is just as critical as the pilot. You can always count on the next guy standing there. No one department is any more important than another" (Gittell, 2003: 34). A Southwest ramp manager illustrated this process between workers and managers: "There's an open door policy so when employees have a problem, they know we can work on it together. It's a totally different environment here. We sit and listen. When that person walks away, he'll have self esteem" (Gittell, 2003: 75). These examples suggest that reciprocal interrelating can be embedded into roles whether the relationship is between worker and customer, worker and worker, or worker and manager.

This paradox of universalistic norms of caring for particular others was articulated by Heimer (1992) as a characteristic of effective network organizations; it was articulated by Buber (1937) as being at the core of relational ethics, and we argue here that it is at the core of relational bureaucracy. Yet caring is rarely discussed or defined in the organizational literature. Caring in the workplace is distinctive, just as caring is distinctive in other contexts, such as the home, friendships, and care work (Bowden, 1997). For example, caring for a dependent loved one is different from caring in the workplace or in friendships. We draw on the ethic of care literature to define caring as a practice in the organizational context (Bowden, 1997; Fine, 2007; Gilligan, 1982; Held, 2006; Noddings, 2002; Waerness, 1996).

Caring as a practice is about the quality of relations. Caring relations are characterized by trust and connectedness, a shared interest in mutual well-being, and identification with another's reality (Fine, 2007; Noddings, 2002). Caring relations are mutual, attentive, responsive to others' needs, and they embody a "sense of responsibility for the well-being of others, a con-

cern for specific human relations, rather than abstract or rarefied principles" (Fine, 2007: 54). Caring relations are built on high-quality connections characterized by positive regard, feelings of inclusion, and a sense of being important to others (Dutton & Ragins, 2007).

At the same time, caring in a relational bureaucracy is embedded in roles, elevating it to a universalistic principle that applies to particular others. An organization that values caring recognizes that relationships are a resource and attends to the social relations between its members; promotes responsiveness to the needs, expertise, and interests of others; and rewards caring responses and practices. For example, hiring and training for relational competence can reflect an organization's valuing of the respect, attentiveness, responsiveness, and concern for others that define caring relations. These structures uphold a way of being that goes beyond any particular customer, worker, or manager while being attentive to their particular needs. As a Southwest employee explained, "There is a code, a way you respond to every individual who works for Southwest Airlines. The easiest way to get in trouble here is to offend another employee" (Gittell, 2003: 34).

But for caring to be effective, it must be timely, in the sense of being attentive and responsive to the situation as it unfolds and to needs as they emerge. To be effective, caring must also be knowledgeable, informed by a perspective larger than one's own. Relational bureaucracy supports caring, timely, and knowledgeable responses through the use of structures that embed reciprocal interrelating into the roles of customers, workers, and managers. We begin by analyzing the relational and bureaucratic forms and by proposing the relational bureaucratic hybrid as a higher synthesis of the two.

## DISTINGUISHING THE RELATIONAL, BUREAUCRATIC, AND HYBRID FORMS

### The Relational Organizational Form

The relational organizational form—also known as the clan-based or network form—starts with the notion that people are fundamentally social beings and that our identities and understanding of the world around us are formed through our interactions with others. Follett (1942/1926a) argued that through reciprocal

interrelating, participants who work in different functions are able to see their own part in relation to the whole, providing them with a more holistic understanding of their own task and, thus, giving them a greater ability to work together as a whole. Burns and Stalker defined the relational or organic form as one that relies on "the adjustment and continual re-definition of individual tasks through interaction with the other"; "a network structure of control, authority and community"; and "a lateral rather than vertical direction of communication through the organization, communication between people of different rank, also, resembling consultation rather than command" (1995/1961: 121). They contrasted this organic form with the mechanistic form that is characterized by "the specialized differentiation of functional tasks into which the problems and tasks facing the concern as a whole are broken down"; "hierarchical structure of control, authority and communication"; and "a tendency for interaction between members of the concern to be vertical, i.e., between superior and subordinate" (1995/1961: 120).

Powell (1990) argued further that the relational or network form is distinguished from markets and bureaucracies by its reliance on relationships of reciprocity. In contrast, markets rely on individually negotiated contracts, and bureaucracies rely on hierarchical control. The network form is neither completely spontaneous, like markets, nor prescribed, like bureaucracies, but, instead, is based on patterns of reciprocity. Connecting to social capital theory (e.g., Adler & Kwon, 2002; Leana & Van Buren, 1999; Nahapiet & Ghoshal, 1998), the relational organizational form can be understood as a type of organization that fosters and benefits from the development of social capital—relationships that are resources for action—among its participants.

In sum, the relational form is characterized by three primary features. First, it is based on reciprocal relationships, resulting in high levels of information processing capacity and communication richness. Second, relationships are emergent and informal, not deliberately created or prescribed through formal organizational structures. Because communication channels are emergent rather than prescribed, participants can create them as needed to accomplish their work. Third, these relationships tend to be personal, built on close ties among individual participants that emerge through experiences they

have shared. The interpersonal nature of these relationships increases the potential for participant engagement, bonding, loyalty, and trust, enabling emotional as well as cognitive connection.

Because of these features, the relational form is theorized to have distinctive performance characteristics. According to Powell,

Networks are particularly apt for circumstances in which there is a need for efficient, reliable information. The most useful information is rarely that which flows down the formal chain of command in an organization, or that which can be inferred from shifting price signals. Rather it is that which is obtained from someone whom you have dealt with in the past and found to be reliable. You trust best information that comes from someone you know well. . . . Information passed through networks is "thicker" than information obtained in the "market" and "freer" than communicated in a hierarchy. . . . The open-ended, relational features of networks, with their relative absence of explicit quid pro quo behavior, greatly enhance the ability to transmit and learn new knowledge and skills (1990: 304).

Networks function through high levels of social capital—assets that are embedded in and mobilized through relationships. Theorists have explored the performance attributes of organizations with high levels of social capital, including the capacity for knowledge creation, knowledge transfer, and the coordination of work (Adler & Kwon, 2002; Nahapiet & Ghoshal, 1998).

**Attentiveness to the situation and to one another.** Follett (1942/1926a) and Heckscher (1994) argued that the relational form draws more fully on the intelligence of its participants via the continual interaction between part and whole carried out through interpersonal exchanges, fostering attentiveness to the situation as it emerges. These reciprocal relationships also foster participants' attentiveness to one another. Dutton and Heaphy (2003) defined a high-quality connection as one that is life giving and a low-quality connection as one that is life depleting. High-quality connections have in common a keen awareness of and attunement to the needs of the other and, thus, are energizing to the individuals involved in them (Dutton, 2003; Dutton & Ragins, 2007; Kahn, 1998; Lewin & Regine, 2000; Williams & Dutton, 1999). The energizing nature of high-quality connections stems from the recognition and validation of one's self by others

(Dutton & Ragins, 2007). Positive regard is feeling "known and loved, or being respected and cared for in the connection" (Stephens, Heaphy, & Dutton, 2012: 386).

These insights from positive organizational scholarship have deep philosophical underpinnings. In the socially embedded view of the human subject, human subjects mutually create their identities and their selves through their social relations (Buber, 1937; Gergen, 1997; Unger, 1975). Relationships of reciprocity or mutual recognition, characterized by high-quality connections, provide the basis for treating others as subjects rather than objects and, thus, provide the very basis for caring. The ability to foster caring is a distinctive capability of the relational form.

**Vulnerability to favoritism.** The pure relational form has some disadvantages, however. Weber (1984/1920) argued that organizations built on personal ties are particularly vulnerable to the abuse of power, to favoritism, and to inefficiencies that arise from behaviors that are driven by the need to curry personal favor rather than by the need to accomplish organizational goals. Furthermore, personal ties do not necessarily emerge at the critical junctures where they are most needed for coordinating work because they are more likely to emerge among those who are similar, owing to the existence of occupational cultures (Van Maanen & Barley, 1984), functional thought worlds (Dougherty, 1992), communities of practice (Faraj & Sproull, 2000), or homophily more generally (Ibarra, 1992).

**Lack of replicability.** The reliance on personal relationships also limits the interchangeability of participants. One participant cannot easily substitute for another because the personal ties that are needed to get work done are embedded in specific individuals. The relational form is therefore particularly vulnerable to participant turnover and to the temporary absence of specific individuals, making scheduling flexibility, including work/life balance, challenging to achieve (Briscoe, 2006).

**Lack of scalability.** In addition, the larger, more diverse, and more geographically dispersed an organization becomes, the less feasible it is that coordination can be achieved through personal relationships because of the difficulty of forming and preserving personal relationships with more people, who are more different, across greater distances. The rela-

tional form is therefore less scalable (Bigley & Roberts, 2001) and more vulnerable to diversity and geographic dispersion (Carlson & Zmud, 1999) than the bureaucratic organizational form, the impersonal relationships of which are designed for interchangeability, scalability, and geographic dispersion.

**Lack of sustainability.** Another weakness of the relational form is the shortage of insights about how organizations can reinforce and sustain the relationships that are fundamental to its operation. It is commonly accepted that these relationships are not designed; rather, they emerge from the common experiences of organizational participants. As a result, theorists have tended to see little room for prescribed or formal structures of any kind in the relational form and have tended instead to see structures as emerging from the informal relationships themselves (Krackhardt & Brass, 1994).

In sum, the relational form, with its reciprocal relationships that foster participant attentiveness to the situation and to one another, is well suited for ensuring caring, timely, and knowledgeable responses. The relational form is hampered by its reliance on personal ties, however, because of their limited scalability, replicability, and sustainability.

### The Bureaucratic Organizational Form

In contrast, the bureaucratic organizational form is designed to segment participants into areas of functional specialization, shaping their communication and even their thought processes into narrow areas of expertise. Information moves within functional silos and is integrated primarily at the top, while those on the frontline work with some autonomy but only within their area of expertise (Weber, 1984/1920: 18). The bureaucratic form has four key characteristics: reliance on formal rules, functional specialization, hierarchy without domination, and professionalism.

Each of these features provides some advantages over alternative organizational forms. First, bureaucracy's emphasis on formal rules can be seen as a substantial improvement over both the despotic and relational forms, in which work is carried out through personal favor (Weber, 1984/1920). Bureaucracy in its ideal form equalizes all whom it serves by acting without regard for the individual person, offering in-

stead a depersonalized application of rules to situations.

Second, through functional specialization bureaucracy leverages the power of the division of labor as conceptualized by both Marx (1886) and Taylor (1911). According to Weber, "Bureaucratic apparatus . . . rests upon expert training, a functional specialization of work, and an attitude set of habitual virtuosity in the mastery of single yet methodically integrated functions" (1984/1920: 988). To protect functional specialization and to accommodate the bounded rationality or limited information processing capacity of human actors, the bureaucratic form deliberately limits horizontal connections across roles (March & Simon, 1958).

Third, hierarchy without domination offers the advantage of unified control to facilitate the achievement of organizational goals. Hierarchy without domination means that a subordinate who reports to the person in the hierarchy above does so within the parameters of the job—not at the personal will or whim of the superior, as in the despotic form.

Finally, professionalism offers the advantage of workers who are obligated to and governed by the requirements of their roles, rather than personal considerations, consistent with the first principle of decisions driven by formal rules and the third principle of hierarchy without domination. Weber argued that these characteristics together would enable bureaucracy to endure over time, to the point of being nearly impossible to destroy.

**Lack of knowledgeable responses.** But bureaucracy has its disadvantages as well. Follett (1942/1926a) noted the failure of bureaucracy to systematically foster horizontal relationships and argued that, as a result, effective coordination in a bureaucracy often depends on whether people in different departments happen to have personal relationships with each other. Follett argued further that the functional division of responsibility overshadows the sense that all participants are responsible for the whole. Other scholars have recognized this shortcoming of bureaucracy—referring to it as the loss of the gains from cooperation—and have noted other inefficiencies as well, including limits to the managerial span of attention when all coordination is achieved at the top of the hierarchy, along with the difficulty of evaluating activities that are organized by function (Barnard, 1954/

1938; Taylor, 1911). In particular, March and Simon (1958) argued that bureaucracy is vulnerable to subgoal optimization, which occurs when participants strive to achieve narrow functional goals, even when their attainment means losing sight of the organization's broader goals or the customer's broader needs. Bureaucracy thus fosters inattentiveness to the emerging situation, focusing participants' attention instead on their narrowly defined tasks.

**Lack of caring responses.** In the same way, bureaucracy fosters inattentiveness to the needs of others. While Weber believed that bureaucracy was a superior form that would be nearly impossible to destroy because of its replicability and scalability, he also worried that the depersonalization inherent in bureaucracy and its deliberate prevention of emotional connection would produce alienation and a crippling of the human spirit (Weber, 1958/1904). By positioning competence in opposition to caring, rules in opposition to specialness, and fairness in opposition to specialness, bureaucracy can "disappear" relational work practices (Fletcher, 1999; Noddings, 1990; Stone, 2000). Bureaucracy fragments the emotional from the rational, just as it fragments parts from the whole. Losing sight of the whole, and thus missing the forest for the trees, is a fundamental shortcoming of the bureaucratic form.

**Lack of timely responses.** While the bureaucratic form works well under some conditions, it works poorly under the conditions that increasingly characterize modern life. In particular, traditional bureaucratic structures work relatively well when the environment is slow moving and predictable, but in environments that are uncertain, ambiguous, or complex, bureaucratic segmentation hampers the flexible, caring, timely responses that are needed (Burns & Stalker, 1995/1961). Bureaucracies thus become vulnerable when speed is required or when a holistic perspective on the work process is required. In sum, bureaucratic segmentation systematically hampers the formation of emotional connections throughout the organization while wasting the intelligence of participants by fostering bounded rationality.

### Relational Bureaucratic Hybrid

Relational bureaucracy is a hybrid of the relational and bureaucratic forms. Specifically,

we theorize relational bureaucracy as a hybrid that uses formal structures to embed reciprocal relationships into the roles of customers, workers, and managers, enabling caring, timely, and knowledgeable responses to others. Gittell (2006) has theorized that relationships of shared goals, shared knowledge, and mutual respect tend to support frequent, timely, accurate, and problem-solving communication, further reinforcing relationships of shared goals, shared knowledge, and mutual respect. As we argue below, this positive dynamic increases participants' attentiveness to the situation and to one another, enabling caring, timely, and knowledgeable responses.

But these responses are not scalable, replicable, or sustainable if they depend on reciprocal relationships among particular individuals, as in the pure relational form. The formal structures in relational bureaucracy serve to support and sustain reciprocal relationships by embedding them into customer, worker, and manager roles, enabling caring, timely, knowledgeable responses to be scaled up, replicated, and sustained over time as individual participants come and go. We theorize below that these formal structures therefore enable the practice of caring on a larger scale than is possible in the purely relational form.

Our proposed relational bureaucratic hybrid integrates the strengths of the relational form (reciprocal relationships) with the strengths of the bureaucratic form (role-based relationships) while counteracting their weaknesses—excessive reliance on personal relationships on the one hand and excessive reliance on fragmented, hierarchical relationships on the other. Another relational bureaucratic hybrid does the opposite, retaining the hierarchy and fragmentation of the bureaucratic form along with the personal relationships of the relational form (see Heckscher, 1994). This dysfunctional hybrid, found in corrupt, inept bureaucracies around the world, encourages participants to use formal structures to guard their turf while using relationships for personal gain. In contrast, our relational bureaucratic hybrid represents a different synthesis of the two forms from which it arises, promoting universalistic norms of caring for particular others.

In the following sections we theorize how relational bureaucracy works, starting with the core of the relational bureaucratic form—

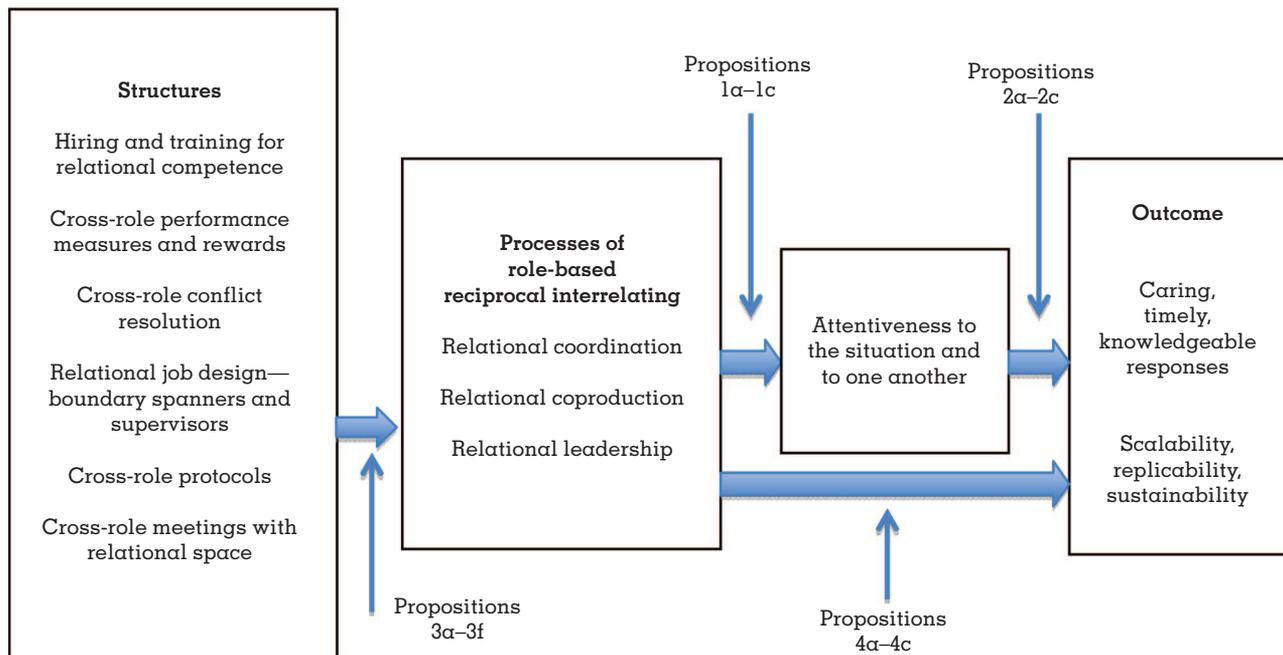
reciprocal interrelating among customers, workers, and managers—and showing how these processes of reciprocal interrelating foster attentiveness to the situation and one another (Proposition 1a through 1c), thus enabling caring, timely, and knowledgeable responses (Propositions 2a through 2c). We explicate the structures that embed reciprocal interrelating into roles, over and above individual participants (Proposition 3a through 3f), thus achieving scalability, replicability, and sustainability over time (Propositions 4a through 4c). See Figure 1.

### THREE PROCESSES OF RECIPROCAL INTERRELATING

Three processes of reciprocal interrelating constitute the core of relational bureaucracy: relational coproduction between worker and customer, relational coordination between worker and worker, and relational leadership between worker and manager. Although any one person can and often does play all three roles, the roles themselves are distinct and so the relationships between the roles are also distinct. The worker-customer relationship is distinguished by its linking of organizational participants with the outside parties for whose benefit the work is done. The worker-worker relationship is distinguished by its linking of organizational participants who play complementary roles in the horizontal division of labor. And the worker-manager relationship is distinguished by its linking of participants who play different roles in the vertical division of labor, with each level requiring a more in-depth, focused perspective than the level above it. See Figure 2.

Despite their distinctiveness, however, these three relationship types have important similarities. First, all are characterized by task interdependence between the parties in the relationship, meaning that each party needs the other in some way in order to fully achieve the desired outcomes. Second, the three relationship types are all characterized by the degree to which *goals are shared versus fragmented*, the degree to which *knowledge is shared versus fragmented*, and the degree to which *respect is mutual versus hierarchical*. To the extent that these relationships are reciprocal, characterized by shared goals, shared knowledge, and mutual respect, they enable distinct perspectives to interpenetrate with each other in a way that is

**FIGURE 1**  
Structures, Processes, and Outcomes of Relational Bureaucracy

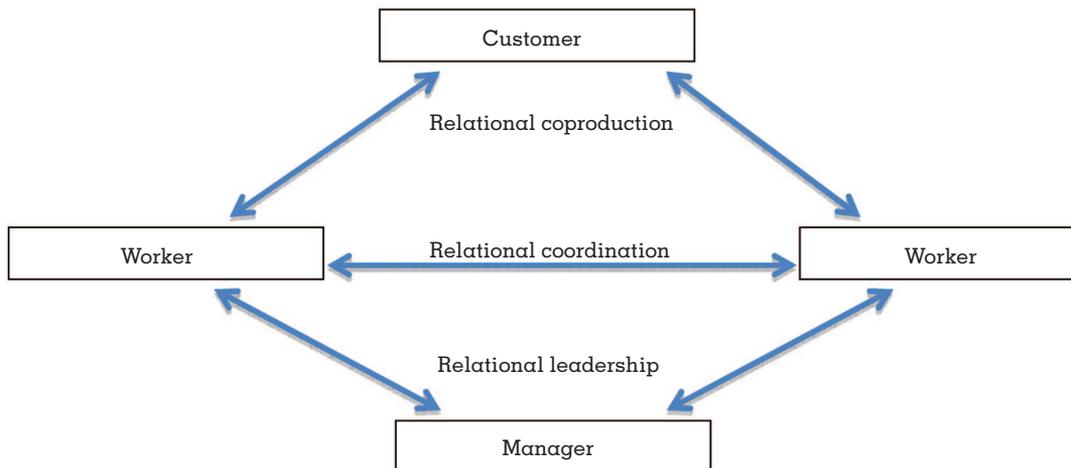


integrative rather than additive, fostering attentiveness to the situation as it emerges. Moreover, to the extent these relationships are reciprocal, they enable participants to treat each other as subjects rather than objects, fostering attentiveness to one another. We now describe reciprocal interrelating as found in the worker-customer, worker-worker, and worker-manager relationships.

**Relational Coproduction in the Worker-Customer Relationship**

The first key relationship is the worker-customer relationship. In the bureaucratic form this relationship is defined by norms of professional autonomy and role-based “power over” rather than “power with,” whereas in the pure relational form this relationship is characterized

**FIGURE 2**  
Three Processes of Role-Based Reciprocal Interrelating



by personalized reciprocity, doing favors, and acting based on personal rather than organizational criteria. In contrast, relational bureaucracy is composed of reciprocal relationships between workers and customers that are based on roles rather than personal favor. In the context of mutual respect, each party brings distinct knowledge to the table, contributing to the establishment of shared goals and enabling responsiveness to customer needs.

Conventional bureaucratic norms for worker-customer relationships direct workers to maintain relations with customers based on equal treatment, objectivity, and emotional detachment, all from a position of power over the customer, justified by professional expertise. These bureaucratic professional norms can interfere in the process of reciprocal interrelating that is needed to achieve a holistic, flexible, emergent response to customers (Douglass & Gittel, in press). Alternative theories of professionalism articulate a more democratic, collaborative, reciprocal, and flexible relationship with customers (Adler, Kwon, & Heckscher, 2008; Sachs, 2003). Yet as noted previously, reliance on personal relationships increases vulnerability to favoritism and lacks the systematic approach that is conducive to scalability and replicability.

Relational coproduction provides an alternative to both of the above. Coproduction is defined as the joint production of services, knowledge, or products through the combined contribution of the worker and the client (Brudney & England, 1983; Needham & Carr, 2009). The concept of coproduction has been well explored in the human and public services literature (Brudney & England, 1983). Relational coproduction is based on relational norms of professionalism—but relational norms in which role-based relationships predominate over personal relationships. Rather than workers telling customers what they need, relational coproduction involves reciprocal interrelating between workers and customers regarding what is to be done and how best to do it. As in the other relationship types, this reciprocal interrelating is characterized by high levels of shared goals, shared knowledge, and mutual respect that together foster attentiveness to the situation and to one another.

Bureaucracy interferes with the process of reciprocal interrelating between workers and customers in three important ways. First, bureau-

cracy shares many common elements with conventional notions of professionalism that can reinforce worker-customer relations characterized by emotional detachment and professional power over the client. While professionalism has traditionally been seen as an alternative to bureaucracy, we view professionalism and bureaucracy as dual and complementary forces that influence worker-customer relationships. Consensus is growing that professionalism and bureaucracy are positively related, especially as professionals increasingly work within an organizational context (Adler et al., 2008; Toren, 1976). The historical autonomy of most professions is lessening. At the same time, demands for accountability and consumer empowerment are increasing, leading to a transformation in professionalism (Adler et al., 2008). Professional practice within the formal organizational context can lead to an “accommodation of professionalism to bureaucracy” (Burbules & Densmore, 1991: 50). While professionals have been traditionally bound by a code of ethics to represent the interests of clients, bureaucrats have been responsible to the interests of the organization (Blau & Scott, 2003). Professionalism within the bureaucratic context may accommodate the bureaucratic norms that deter special consideration for individual circumstances, but it also has the potential to develop relational norms that support the interests of individual customers.

Second, bureaucracy discourages the use of caring or knowledge of individual circumstances to guide decisions and actions. Weber described the bureaucratic administrator’s relationship to employees and customers as “personally detached and strictly objective,” not “moved by personal sympathies” (1968: 975). The professional boundaries and expert knowledge that characterize conventional notions of professionalism mirror the emotional neutrality and scientific rationality of Weber’s ideal bureaucracy. Davies argued that the formality and distance in Weber’s ideal “are seen as the only route to a rational decision” (1995: 25), thereby excluding emotion or individual circumstances as an element of decision making. Weber saw bureaucracy as a way to eliminate unjustifiable differences in how people are treated, yet these differences are often justifiable from a human perspective and, moreover, form the very basis of relational work (Barley & Kunda, 2001).

Third, not only does this notion of professionalism impose restrictions on emotional connectivity and responsiveness, but it can also position the worker as an expert with power over the customer, disrupting the potential for shared goals and shared knowledge (Douglass & Gittell, in press). The possibility that the customer may have knowledge that enables him or her to contribute in a fundamental way to the achievement of desired outcomes is not considered, making coproduction impossible. Hwang and Powell have argued that this professional orientation "can lead to diminished experimentation as well as an orientation towards doing *for* others rather than *with* them" (2009: 207), creating a barrier to shared goals and mutual respect.

These challenges for relational work processes posed by conventional notions of the worker-customer relationship are well documented, and alternative forms of professionalism have been proposed that address the worker-customer power imbalance and the constraints of rigid, rule-based interactions with customers. These theories contribute to our understanding of relational coproduction, characterized by the combined contributions of workers and customers to outcomes. Collaborative, democratic, and transformative models of professionalism (Adler et al., 2008; Sachs, 2003) all suggest moving beyond the exclusive control of expertise that characterizes conventional professionalism. Adler et al. describe a collaborative professional as one who learns to "see other professional communities and non-professionals [perhaps customers] as sources of learning and support, rather than interference" (2008: 15). Gutek (1995) describes the relational dynamics of service relationships through which customers move beyond being passive recipients to adding significant value by sharing their knowledge with that of the service provider. The move away from the professional-as-expert suggests a more "fluid expertise" that aligns with the move toward a more collaborative worker-customer relationship (Fletcher, 2007: 356). Moreover, a transformative notion of professionalism can embrace both the emotional and the rational, recognizing that emotions are a source of valuable data about individuals as well as situations (Kahn, 2005). Rather than marginalizing emotional ways of knowing and connecting with others, relational coproduction affirms relational capacities.

This process of reciprocal interrelating connects workers and customers as they communicate to develop shared goals and knowledge in the context of respect for the humanity and expertise of the other. Together, shared goals, shared knowledge, and mutual respect foster worker and customer attentiveness to the emerging situation and to one another. For example, shared goals and knowledge and mutual respect between a parent and a teacher foster attentiveness to the child in the context of his/her school, family, and community life and to how that particular parent and teacher might most effectively partner to support the child. The parent and teacher together determine what is to be done, and how best to do it, from a holistic perspective gained from shared goals, shared knowledge, and mutual respect. This attention to the situation and to the unique needs, interests, and emotions of the other is fostered by the process of reciprocal interrelating.

*Proposition 1a: Relational coproduction between workers and customers fosters attentiveness to the situation and to one another.*

### **Relational Coordination in the Worker-Worker Relationship**

The second key relationship is the worker-worker relationship linking organizational participants who play complementary roles in the horizontal division of labor. In the pure relational form the worker-worker relationship is characterized by personalized reciprocity—acting based on personal rather than organizational criteria. In contrast, in the bureaucratic form coordination is exercised primarily at the level of top management, keeping frontline workers largely divided within their areas of expertise and unaware of the larger picture, thus encouraging subgoal optimization and limiting employees' ability to share in the process of coordination (March & Simon, 1958; Weber, 1984/1920). Relational bureaucracy is instead composed of reciprocal relationships among workers characterized by shared goals, shared knowledge, and mutual respect, supported by structures that embed reciprocal interrelating into workers' roles.

Follett conceptualized coordination as a process of reciprocal interrelating:

My first principle, coordination as the reciprocal relating of all factors in a situation, shows us just what this process of coordination actually is, shows us the nature of unity. . . . This sort of reciprocal relating, this interpenetration of every part by every other part and again by every other part as it has been permeated by all, should be the goal of all attempts at coordination, a goal, of course, never wholly reached (1949: 214).

Follett further distinguished between coordination as an additive total versus coordination as a relational total, arguing that this distinction plays a role in the social sciences similar to the role that Einstein's theory of relativity plays in the natural sciences. The process of coordination is not one of adding up all the factors in a situation but, rather, one of understanding their interpenetration or interdependence. Effective coordination requires systems thinking, a sharing and integration of knowledge itself. Because coordination occurs through the integration of knowledge, and because that integrated knowledge then informs action, Follett contended that coordination should occur throughout the organization, not just at the level of top management.

The downsides of bureaucratic coordination are clear. Follett argued that the functional division of responsibility tends to overshadow the sense that all participants are responsible for the whole. Referring issues up the chain of command for resolution is not sufficient because that solution ignores the process of reciprocal interrelating through which people come to understand and act effectively on the world around them. "When you have a purely up and down the line system of management . . . you lose all the advantage of the first-hand contact, that backwards and forwards, that process of reciprocal modification" (Follett, 1949: 198). One of bureaucracy's fundamental flaws is its disruption of the intersubjective cognitive process through which workers gain their understanding of a situation and their ability to respond holistically to it (Piore, 1993: 16).

The dominant approach by organizational scholars after Follett was to identify conditions—such as uncertainty and interdependence—favoring the relational form of coordination and then to seek ways to *minimize* those conditions, enabling the survival of a more mechanistic, bureaucratic way of coordinating work that was assumed to be simpler and more cost effective. To minimize the need for relational coordination, organizations were advised

to build buffer inventories—work in process inventories that enable each task to proceed relatively independently from other tasks and to be relatively robust to unpredicted changes that might occur in other task areas or in the external environment (March & Simon, 1958).

Thompson (1967) described relational forms of coordination as "mutual adjustment"—a process of adjusting all factors of the situation to each other—similar to Follett's definition of coordination. But like March and Simon, he argued that relational forms of coordination are prohibitively difficult and can be avoided except under the conditions of "reciprocal task interdependence," where the outcome of one activity affects the performance of another activity and vice versa, a condition that Follett argued is always essentially present. Inserting buffers to reduce reciprocal task interdependence enabled the bureaucratic form of coordination to endure by minimizing the need for direct relationships between workers.

In the increasingly high-velocity, unpredictable environment of subsequent decades, a range of innovations emerged to address the challenge of coordinating work, many of them placing an emphasis on achieving coordination directly among frontline workers. If frontline workers are strategically positioned at the interface between the organization and a high-velocity environment, rather than simply operatives who respond to orders from above, then coordination should occur at this interface as well as at higher levels of the organization. Galbraith (1972), Tushman and Nadler (1978), and Argote (1982) proposed an information processing theory of coordination, shifting the weight of attention toward relational forms of coordination and demonstrating their increasing usefulness under conditions of uncertainty.

Relational forms of coordination have been further developed in recent years, highlighting the intersubjectivity of the coordination process by paying close attention to the quality of communication and relationships among participants (Bechky, 2006; Faraj & Xiao, 2006; Gittel, 2002a; Heckscher & Adler, 2006; Stephens, 2010). Weick (1995), for example, argued that coordination occurs through the development of mutually reinforcing interpretations among participants, enabled by collective sensemaking. The notion of coordination as collective mind was further developed by Weick and Roberts (1993) in their

study of heedful interrelating on flight decks, demonstrating that collective mind and heedful interrelating enable organizations to achieve reliable performance under demanding conditions. Shared cognitions are at the heart of expertise coordination, as proposed by Faraj and Sproull (2000), suggesting how reciprocal relationships foster awareness of a situation as it emerges. Quinn and Dutton (2005) have argued that reciprocal relationships are critical for achieving the state of flow and exchange of energy that enable participants to coordinate work directly with each other by fostering workers' attentiveness to the emerging situation and to one another. For example, staff in a primary care clinic may use reciprocal relationships of shared goals, shared knowledge, and mutual respect to foster their attentiveness to the emerging situation and to one another as scheduled patients arrive on time, late, or not at all, with both expected and unexpected conditions to be treated.

*Proposition 1b: Relational coordination between workers fosters attentiveness to the situation and to one another.*

### **Relational Leadership in the Worker-Manager Relationship**

The worker-manager relationship connects participants who are assigned to different roles in the vertical division of labor, with in-depth focused knowledge associated with frontline roles and broader, less-focused knowledge associated with managerial roles. This vertical division of labor creates an interdependence between roles, with managers depending on the deeper, more focused knowledge of workers and workers depending on the broader contextual knowledge of managers at successive levels of the organization. Both are necessary, neither is sufficient, and neither is intrinsically more important than the other.

In the pure bureaucratic form, in contrast, the worker-manager relationship is defined by norms of hierarchy and power over rather than power with (Weber, 1984/1920). At the same time this hierarchy is embedded in roles that provide some protection against outright domination (Weber, 1984/1920). "Hierarchy without domination" means that a realm of autonomy exists

within the confines of a worker's job description, protected by formal rules from outright domination (Weber, 1984/1920). Theories of street-level bureaucracy (Lipsky, 1980), as well as more recent theories of job crafting (Berg, Grant, & Johnson, 2010; Wrzesniewski & Dutton, 2001), suggest that workers do indeed have a realm of autonomy in traditional bureaucratic organizations, providing them discretion within the confines of their job descriptions and even enabling them to reshape their job descriptions. This realm of autonomy can be used to withhold work effort but can also be used to take action on behalf of particular customers or to increase the meaning of the work. Effective use of this autonomy is limited, however, when workers lack understanding owing to their subordinate position in the hierarchy and their disconnected role in the horizontal division of labor.

In the pure relational form leaders exercise power and influence based on their personal qualities rather than positional authority. The upside of the relational form is that leaders must find a way to earn the commitment or loyalty of organizational participants. The downside of the relational form is that the lack of role-based authority means there are no formal limits to the use of that authority, which can degenerate into despotism or nepotism, as Weber argued when making his case for the superiority of the bureaucratic form.

Relational bureaucracy is characterized instead by worker-manager relationships that are both role based and reciprocal. Follett described this reciprocal control as being not coercive but, rather, "a coordinating of all functions, that is, a collective self-control" (1949: 226). Achieving this collective self-control, she argued, requires a form of leadership that is distributed throughout the organization rather than concentrated in a few positions. Follett observed some organizations in which "we find responsibility for management shot all through a business . . . [and] some degree of authority all along the line . . . [such that] leadership can be exercised by many people besides the top executive" (1949: 183). Rather than vesting authority in one person over another based on his or her position in the hierarchy, authority is shared (Fletcher, 1999). The heart of reciprocal or relational leadership is to recognize authority in each position, based on the knowledge associated with it.

Consistent with Follett's argument, McGregor argued that

the capacity to exercise a relatively high degree of imagination, ingenuity and creativity in the solution of organizational problems is widely, not narrowly, distributed in the population . . . [but] under the conditions of modern industrial life, the intellectual potentialities of the average human being are only partially utilized (1960: 47–48).

Realizing these potentialities requires reliance on integration and self-control rather than on external direction and control, with managers and workers engaging with each other to articulate the goals of the organization and how best to achieve those goals.

Ancona and Bresman (2007) explored distributed leadership as a form of leadership that is carried out by both formal and informal leaders throughout the organization to facilitate achievement of organizational objectives. They demonstrated that leadership is a form of influence that can be exercised by participants at any level of an organization and that leaders are most effective when they can inspire others to engage in the responsibilities of leadership, rather than attempting to carry out all leadership responsibilities on their own. Distributed leadership thus requires facilitative leadership behaviors more so than directive leadership behaviors and transformative leadership behaviors more so than transactional or passive leadership behaviors. Consistent with this argument, Carson, Tesluk, and Marrone (2007) found that supportive supervisory behaviors predict greater engagement of frontline workers in shared leadership.

Relational leadership owes much to the concepts of distributed and shared leadership. However, relational leadership does more than draw upon expertise and leadership from participants throughout the organization. It is a process of reciprocal interrelating through which the expertise held by different participants interpenetrates, creating a more holistic perspective that is integrative rather than additive. Relational leadership thus requires the ability to facilitate the interpenetration of expertise among others such that their expertise is not simply added up but, rather, each participant is influenced by the other to achieve a more integrated understanding of the situation. Relational leadership therefore also draws on the

concept of "connective leadership," as articulated by Lipman-Bluman:

Connective leadership derives its label from its character of connecting individuals not only to their own tasks and ego drives, but also to those of the group and community that depend upon the accomplishment of mutual goals. It is leadership that connects individuals to others and to others' goals, using a broad spectrum of behavioral strategies. It is leadership that "proceeds from a premise of connection" (Gilligan, 1982) and a recognition of networks of relationships that bind society in a web of mutual responsibilities (1992: 184).

Relational leadership is, thus, a process of cocreation that requires a particular set of skills, as reflected in Fletcher's concept of "fluid expertise":

Power and/or expertise shifts from one party to the other, not only over time but in the course of one interaction. This requires two skills. One is a skill in empowering others: an ability to share—in some instances even customizing—one's own reality, skill, knowledge, etc. in ways that make it accessible to others. The other is skill in being empowered: an ability and willingness to step away from the expert role in order to learn from or be influenced by the other (1999: 64).

Willingness to step away from the expert role in order to learn from the other is also known as leading through humble inquiry (Schein, 2009). When designated leaders demonstrate this willingness, they help to create a safe space for all participants to set aside egos in order to connect for a shared purpose. Leading through humble inquiry is therefore foundational to the process of relational leadership. Leading through humble inquiry does not require one to be humble in the sense of lacking confidence in one's own contributions. On the contrary, it requires the confidence to recognize that one's own contributions, however essential, are not sufficient to achieve the desired outcomes given the distribution of relevant expertise and the need for distinct areas of expertise to interpenetrate to create a more holistic understanding of the situation.

In sum, relational leadership requires workers and managers to develop shared goals, shared knowledge, and mutual respect, fostering attentiveness to the emerging situation and to one another, as when engineers and their project managers negotiate revised deadlines, drawing on their differential knowledge regarding the

challenges of the work, the needs of the client, and the scheduling demands posed by other projects.

*Proposition 1c: Relational leadership between workers and managers fosters attentiveness to the situation and to one another.*

### CARING, TIMELY, AND KNOWLEDGEABLE RESPONSES

In this section we outline three key outcomes that are expected to result from these positive relational dynamics. As seen above, when worker-customer, worker-worker, and worker-manager relationships are reciprocal, they enable distinct perspectives to interpenetrate with each other in a way that is integrative rather than additive, enhancing participant attentiveness to the situation. Moreover, when these relationships are reciprocal, participants treat each other as subjects rather than objects, fostering their attentiveness to each other. By fostering attentiveness to the situation and to others, these forms of reciprocal interrelating enable caring, timely, and knowledgeable responses.

#### Caring Responses

Caring responses, by definition, require attentiveness to others in the context of the situation. How does role-based reciprocal interrelating enable caring responses? On a relational level, organizations can be thought of as systems of attachment or detachment, both cognitively and emotionally (Kahn, 1998). As Kahn explains, "Caring occurs in the context of meaningful relationships and attachments. Control occurs in the context of systems and processes that maintain distance between people in different roles" (2005: 156). Whereas bureaucracy disrupts attachment by "disappearing" emotion and maintaining distance and the relational form relies on personal rather than role-based attachments, relational bureaucracy connects participants both cognitively and emotionally. This connectivity provides participants with critical insights to enable caring responses. Through the sharing of goals and knowledge, participants learn about one another, their perspectives, and their expertise. Through mutual respect, partic-

ipants recognize, value, and attend to the feelings and needs of particular others.

For example, Douglass (2011) describes a situation in which a preschool teacher requested a particular day off after learning that her adult son would be coming home unexpectedly from military service abroad. Other teachers had previously requested this same day off, making it impossible to honor the teacher's request. The program director shared the situation with all the staff, enabling an empathic response to emerge in which another teacher volunteered to take a different day off. Caring behaviors such as this are responsive to the situation and another's needs and interests.

*Proposition 2a: By fostering attentiveness to the situation and to one another, reciprocal interrelating enables caring responses.*

#### Timely Responses

Attentiveness to one another and to the situation as it unfolds enables participants to respond to that situation, individually and collectively, in a timely way. This dynamic is well explored in the literature on situational awareness (Faraj & Xiao, 2006), heedful interrelating (Weick & Roberts, 1993), and high-reliability organizing (Weick & Sutcliffe, 2003; Weick, Sutcliffe, & Obstfeld, 2005). The insight we add here is the importance of reciprocal interrelating among all participants—customers, workers, and managers—in order to bring their unique perspectives to bear on the development of collective awareness and, thus, to sense when a response is needed.

*Proposition 2b: By fostering attentiveness to the situation and to one another, reciprocal interrelating enables timely responses.*

#### Knowledgeable Responses

Similarly, attentiveness to one another and to the situation as it unfolds enables participants to respond to that situation, individually and collectively, in a knowledgeable way. The same literature on situational awareness (Faraj & Xiao, 2006), heedful interrelating (Weick & Roberts, 1993), and high-reliability organizing (Weick & Sutcliffe, 2003; Weick et al., 2005) sug-

gests that collective awareness enables participants to respond in a knowledgeable way to unexpected events. The insight we add here is the importance of reciprocal interrelating among all participants—customers, workers, and managers—for bringing their unique perspectives to bear on the development of collective awareness and, thus, to sense the nature of the response that is most appropriate given the unique situation that they are facing.

*Proposition 2c: By fostering attentiveness to the situation and to one another, reciprocal interrelating enables knowledgeable responses.*

If reciprocal interrelating occurs only among individual participants, however, the organization will fail to ensure the scalability, replicability, and sustainability of these responses over time. Relational bureaucracy therefore needs formal structures to embed reciprocal interrelating into roles, over and above the individual participants.

### STRUCTURES THAT EMBED RECIPROCAL INTERRELATING INTO ROLES

How do organizations embed reciprocal interrelating into roles, over and above the individuals who inhabit them? Weick (1995) recognized this challenge, arguing that because organizations are composed of patterns of intersubjectivity, their primary challenge is to sustain these patterns over time as participants come and go. To sustain these patterns, organizations must find a way to bridge intimate intersubjectivity and generic intersubjectivity.

It is precisely the quality of susceptibility of an interaction to replacement and substitution of the interactants that is an important defining property of organizations. If the capability to make mutually reinforcing interpretations is lost when people are replaced, then neither organization nor sense-making persist (Weick, 1995: 73).

Heimer (1992) argued further that while sociologists like Parsons have tended to elevate universalistic relationships above particularistic or personal relationships, the key for an effective network organization is to move beyond this dichotomy by applying universalistic principles to the treatment of particular individuals.

But there are alternative ways to overcome this dichotomy. Ouchi (1980) argued that partic-

ipants must be socialized from the start into accepting the organization's goals without question, thus enabling the organization to achieve control without either hierarchy or contracts. While Ouchi's solution may be convenient, asking participants to accept organizational goals without question is clearly antithetical to the concept of relational leadership and therefore antithetical to the relational bureaucratic form. Another solution is to foster repeated interpersonal interactions over time. Lawler, Thye, and Yoon (2008) argued that, over time, person-to-person ties can become generalized into person-to-group ties, thus generating group obligations from interpersonal obligations. Leana and Van Buren (1999) identified formal practices, such as employment security and reciprocity norms, that build organizational social capital by fostering repeated interpersonal interactions.

However, Leana and Van Buren (1999: 545) suggested another path, pointing out that formal structures can be used to define relationships in terms of roles rather than individuals. Gittell, Seidner, and Wimbush (2010) have taken this argument further, proposing that organizations can develop relational work systems—formal structures that foster relationships of shared goals, shared knowledge, and mutual respect among workers—enabling workers to more effectively coordinate their work. In this section we build on previous work by showing how formal structures can foster role-based reciprocal interrelating between worker and worker, worker and customer, and worker and manager.

### Selection and Training for Relational Competence

Selection and training are typically used to ensure that participants have the requisite knowledge, skills, and abilities for the work at hand, and sometimes also to ensure commitment to the organization and its goals. Going a step further, the relational bureaucratic form requires participants—workers, customers, and managers—to be selected and trained for their relational competence to develop shared goals, shared knowledge, and mutual respect with others. Relational competence involves skills such as perspective taking and empathy, which are deeply rooted in personal traits but also can be learned (Williams, 2011). Perspective taking can

enable empathy, thereby motivating caring relations (Williams, 2011). Fluid expertise requires both managers and workers to have relational skills, such as openness to learning from others, enabling them to move back and forth between expert and nonexpert roles (Fletcher, 2007). In addition, Fletcher (2007) argues that fluid expertise also requires a “relational stance,” an underlying belief in the potential for human growth-in-connection. Selection and training can be designed to identify and develop these relational competencies (Baker & Dutton, 2007).

Selection and training not only have the potential to identify and develop relational competence but also have the potential to elicit it. Given that individuals have a range of potential capabilities that can be either elicited or suppressed, selection and training for relational competence can signal that participants are indeed welcome to bring their relational capabilities to work. Even customers can be selected and trained with an eye toward their role as partners in the work process, encouraging them to develop shared goals, shared knowledge, and mutual respect with the workers who are serving them, as well as with their fellow customers, as in a school, for example, where coproduction may require collaboration among students as well as with their teachers. In all three role relationships, selection and training can uphold a way of being that is attentive to each individual while going beyond any particular individual to reflect a more universal sense of “how we treat each other here.”

*Proposition 3a: Selection and training for relational competence help to embed reciprocal interrelating into customer, worker, and manager roles.*

### **Cross-Role Performance Measures and Rewards**

Traditional performance measures and rewards tend to focus on local goals in order to achieve accountability, but in doing so they encourage subgoal optimization—that is, optimizing one’s local goal at the expense of the broader goal (March & Simon, 1958). In addition, they often ignore caring altogether, in favor of more readily quantifiable goals (Cancian, 2000; Davies, 1995; Eaton, 2000; Fletcher, 1999). In contrast, cross-role performance measures and re-

wards encompass all roles that are involved in achieving desired outcomes, encouraging participants to focus on problem solving rather than assigning blame (Chenhall, 2005; Deming, 1986; Locke & Latham, 1990). Such an approach reduces finger-pointing and supports the development of shared goals, shared knowledge, and mutual respect across roles (Gittell et al., 2010).

Cross-role performance measures and rewards also encourage participants to take a broader perspective on their work, thus fostering the quality of relationships among participants. Davies (1995), Fletcher (1999), Cancian (2000), Eaton (2000), and Watson (2009) suggest ways to align relational work with organizational norms in measurable ways, such as creating measures and rewards for relational work and explicitly including relational work in regulatory or reimbursement systems. Performance measures that hold workers, managers, and customers jointly responsible for achieving desired outcomes can encourage the development of shared goals, shared knowledge, and mutual respect. For example, when hospital leaders, support staff, and patients are given shared accountability for outcomes of care along with clinicians, they are more likely to partner to achieve the desired outcomes.

*Proposition 3b: Cross-role performance measures and rewards help to embed reciprocal interrelating into customer, worker, and manager roles.*

### **Structured Cross-Role Conflict Resolution**

Follett (1942/1926b) argued that conflict is not a problem to be suppressed but, rather, an opportunity for the creative juxtaposition of opposing perspectives, generating new insights and innovative solutions. Conflicts have been found to improve performance when they occur in a context that values task-related conflict; however, unresolved conflicts undermine relationships and hinder performance over time (Jehn, 1995). Moreover, when participants are divided by power differences, geographical separation, or distinct thought worlds, conflicts are not likely to be resolved spontaneously. In such a context the laissez-faire approach—“we just hope people use common sense and work it out with each other”—is expected to enable dysfunctional relationship patterns to persist (Gittell, 2009).

Cross-role conflict resolution structures provide a systematic way to articulate and accommodate multiple points of view, each with the potential to add value to the work process. Structured conflict resolution provides opportunities for building shared goals and a shared understanding of the work process and for identifying and correcting disrespectful interactions, whether in the context of the worker-worker, worker-manager, or worker-customer relationship (Gittell, 2000; Mareschal, 2003). In a school context, for example, conflict resolution structures should be able to address conflicts between teachers, between principals and teachers, between teachers and students, and even between students. While several studies conclude that relationship conflict should be avoided in favor of task conflict (Jehn, 1995; Simon & Peterson, 2000), relationship conflict is arguably just as valuable (Edmondson & Smith, 2006). When addressed constructively, both kinds of conflict have the potential to build relationships (Gittell, 2003).

*Proposition 3c: Structured cross-role conflict resolution helps to embed reciprocal interrelating into customer, worker, and manager roles.*

### Relational Job Design—Boundary Spanners and Supervisors

Responsive engagement with others inherently involves some degree of ambiguity, a factor that bureaucratic systems attempt to eradicate (Mumby & Putnam, 1992). Rather than reducing ambiguity through rigid rules and a one-size-fits-all approach, relational bureaucracy incorporates role flexibility to allow for ambiguity while still ensuring effective work processes. To respond in a knowledgeable, timely, and caring way to others, participants need the discretion to legitimately go “off script,” and organizations need the structures to coordinate and align this improvisation with organizational goals. To preserve the richness of reciprocal interrelating in role-based relationships, formal roles must be designed in a way that is flexible enough to include principled customization to the needs of individual role inhabitants, consistent with the ethic of care and responsibility (Grant, 2007; Grant & Parker, 2009). Going beyond existing literature, relational job

design in our model includes not only role expectations to support reciprocal interrelating but also the staffing levels to enable it.

Moreover, relational job design can be used to design specific roles, such as the boundary spanner, whose job is to integrate the work of other people around a project, process, or customer (Mohrman, 1993). Because boundary spanners build understanding between areas of expertise, they are expected to add value when existing boundaries are highly divisive. But boundary spanner roles support relational processes only when they are staffed sufficiently to provide the time needed to engage in relational practice (Gittell, 2000; Gittell et al., 2010). For example, case management jobs can be designed with large caseloads and the expectation of managing a checklist of clients. As one case manager explained, “I am responsible for about 30 patients. . . . With this number, I just look at the list for problem patients” (Gittell, 2003: 139). Alternatively, boundary spanner jobs can be designed with more moderate caseloads and role expectations that enable ongoing conversations among themselves, the client, and colleagues who serve that client. This alternative, more relational job design was described by a nurse in the following way:

Case managers have to be very, very, very good communicators and negotiators and very assertive but also have a good sense of timing. . . . Willing to be a patient advocate but also be able to balance the financial parameters, think “out of the box” and have a system perspective (Gittell, 2009: 143).

Similarly, theorists have argued that relational approaches to leadership tend to be more time consuming than autocratic forms of control. According to McGregor,

Roles cannot be clarified, mutual agreement concerning the responsibilities of a subordinate’s job cannot be reached in a few minutes, nor can appropriate targets be established without a good deal of discussion. It is far quicker to hand a subordinate a position description and to inform him of his objectives for the coming period (1960: 76).

Small spans of control increase the time a supervisor can work alongside any given worker, and therefore provide greater opportunities for building shared goals, sharing “fluid expertise,” and providing coaching and feedback (Fletcher, 2007; Likert, 1961; Tannenbaum, 1968). Gittell

(2001) found that smaller spans of control enabled managers to play a more facilitative coaching role, increasing relational coordination and desired performance outcomes.

*Proposition 3d: Relational job design helps to embed reciprocal interrelating into customer, worker, and manager roles.*

### Flexible Cross-Role Protocols

Flexible cross-role protocols enable participants to develop a sense of shared goals, shared knowledge, and mutual respect by providing them with a mental map of how their individual tasks are connected to the overall process, enabling them to more readily adapt to emergent needs over time (Feldman, 2003; Gittell, 2002a). Similarly, Adler and Borys argue that

enabling procedures provide users with visibility into the processes they regulate by explicating key components and by codifying best practice routines. . . . [Although tasks are specialized and partitioned] procedures are designed to afford [workers] an understanding of where their tasks fit into the whole (1996: 72).

Feldman and Rafaeli (2002) show that routines can serve as sources of connections, shared understandings, and shared meanings among participants, while Faraj and Xiao (2006) show that epistemic coordination practices such as protocols contribute to successful outcomes in dynamic settings by providing a common point of reference for workers with distinct areas of expertise.

For example, organizations can develop “soft and selective standards that do not prescribe how trade-offs must be made but provide direction for making trade-offs” (Noordegraaf, 2007: 779; see also Davies, 1995). Mass customization offers a model for this approach by integrating principles of standardization with customization (Selladurai, 2004). In her study of child care centers, Douglass (2011) shows how flexible protocols can be designed to support workers’ use of flexible and caring responses with clients. Similarly, in mental health clinics counselors can be trained to follow a prespecified set of rules, or they can be provided with protocols for responding flexibly and sensitively to the differing needs of clients. The flexible protocol enables a counselor to engage in reciprocal interrelating

with a client, with fellow staff members who work with that client, and with managers who can play a supportive, cocreative role.

*Proposition 3e: Flexible cross-role protocols help to embed reciprocal interrelating into customer, worker, and manager roles.*

### Cross-Role Meetings with Relational Space

Knowledge of the other party’s needs, feelings, wishes, or individual circumstances is required in order to implement a flexible protocol. Thus, role-based reciprocal interrelating also requires scheduled or planned interactions between participants. In a study of nursing homes, Lopez (2006) found that organizations can foster authentic worker-customer relationships through the use of “organized emotional care”—specific organizational structures and practices that support, rather than restrict or coerce, worker-customer relationships. In one of the nursing homes in his study, Lopez found a hybrid approach to emotional care in which bureaucratic procedures were used to support interactive work. The organization established rules about when and how workers should interact with customers—for example, instructing workers to involve customers in decisions about leaving their rooms and to engage customers in conversations promoting relationship building. Lopez argues (2006: 152) that rather than being coercive bureaucratic structures that impede relationships, these rules emphasize the humanity and contribution of the customer and create “new possibilities for meaningful relationships” between workers and customers.

Similarly, cross-functional meetings give workers a chance to coordinate their tasks interactively on the spot (Argote, 1982), thus providing an opportunity to develop relational coordination (Gittell, 2002a). Faraj and Xiao (2006) argue that meetings are a dialogic coordination practice that contributes to successful outcomes in dynamic, time-constrained settings by providing a setting in which distinct perspectives can interpenetrate and influence one another. Face-to-face interactions help to ensure effective communication because of their higher bandwidth, their immediacy, and their ability to build connections among participants through the use of

nonverbal clues (Goffman, 1961; Nohria & Eccles, 1992).

As Kellogg (2009) suggests, however, it is not the cross-role meeting itself but the creation of a relational space that embeds reciprocal interrelating into participant roles. One physician described her efforts to create relational space in the context of family-centered rounds:

We introduce ourselves to the family, and we'll say something like—"May is your nurse and she's awesome—she's been a nurse longer than I've been a doctor." We say hello to the family and ask how are things going since I last saw you? We ask the nurses and pharmacists to participate during the rounds—and they do—then they know they are valuable. We show them that there's value to them being in the room. Then they feel more comfortable answering the family's questions afterward (Gittell & Suchman, in press).

*Proposition 3f: Cross-role meetings with relational space help to embed reciprocal interrelating into customer, worker, and manager roles.*

### ENABLING SCALABILITY, REPLICABILITY, AND SUSTAINABILITY

The formal structures described above allow organizations to go beyond the fleeting, precarious nature of the pure relational or network form, enabling reciprocal interrelating to be scaled up, replicated, and sustained over time.

#### Scalability

As noted earlier, one key weakness of the pure relational form is its reliance on personal ties, which limits its scalability (Bigley & Roberts, 2001) and its vulnerability to diversity and geographic dispersion (Carlson & Zmud, 1999) relative to the bureaucratic form, with impersonal relationships designed for interchangeability, scalability, and geographic dispersion. To the extent that the formal structures described above succeed in embedding relationships into roles, the caring, timely, knowledgeable responses found in the relational form can be scaled up to enable large-scale endeavors to be carried out across geographic boundaries.

*Proposition 4a: Role-based reciprocal interrelating enables the scalability of caring, timely, and knowledgeable responses.*

#### Replicability

Reliance on personal ties also limits the replicability of the relational form relative to the bureaucratic form. As individual participants come and go to pursue their broader work and nonwork goals, the pure relational form is challenged to create consistent, repeatable outcomes (Briscoe, 2006). Moreover, the need to continually reinvent the wheel results in wasted time and resources. To the extent that formal structures succeed in embedding relationships into roles, the caring, timely, knowledgeable responses found in the relational form can be more readily replicated, resulting in greater consistency and efficiency of resource utilization while giving individuals the freedom to come and go as needed.

*Proposition 4b: Role-based reciprocal interrelating enables the replicability of caring, timely, and knowledgeable responses.*

#### Sustainability

As noted above, another key weakness of the pure relational form is the shortage of insights about how organizations can sustain the relationships that are fundamental to its operation. Theorists have tended to see little room for prescribed or formal structures of any kind in the relational form and have tended instead to see structures as emerging from the informal relationships themselves (Krackhardt & Brass, 1994). To the extent that formal structures succeed in embedding relationships into roles, the caring, timely, knowledgeable responses found in the relational form can be sustained over time.

*Proposition 4c: Role-based reciprocal interrelating enables the sustainability of caring, timely, and knowledgeable responses.*

### DISCUSSION

In this article we capitalize on the creative friction that comes from the integration of alternatives that are commonly considered to be mutually exclusive (Ashcraft, 2001: 1316; Follett, 1942/1926b). Specifically, the relational bureaucratic hybrid seeks to preserve the reciprocal interrelating among customers, workers, and

managers found in the relational form while redesigning the formal structures found in the bureaucratic form to embed these reciprocal relationships into roles rather than individual participants, resulting in a higher synthesis of the relational and bureaucratic forms. In short, the synergies of relational bureaucracy arise from combining one core aspect of the relational form—reciprocal interrelating—with one core aspect of the bureaucratic form—formal structures—to support the development of something that neither form is able to achieve on its own—role-based reciprocal interrelating.

### Alternative Relational Bureaucratic Hybrids

Previous hybrid models have conceptualized the interplay of the relational and bureaucratic forms differently than we have here. Heckscher (1994) described a dysfunctional hybrid that combines the rigid hierarchy and fragmentation of the pure bureaucratic form with the reliance on personal relationships to get things done, as found in the pure relational form. Heckscher proposed, in contrast, a postbureaucratic form that is consistent in many ways with the relational bureaucratic model that we introduce here, but without embracing or developing the role of formal structures. MacDuffie (1995) proposed a flexible production model, now more commonly known as lean production, drawing from the bureaucratic form its use of structured methodologies to standardize work, while drawing from the relational form the idea of placing this structured methodology into the hands of frontline workers, enabling them to connect with each other across their specialized roles and to connect with customers by pulling customer information into a highly responsive lean production system. Adler et al.'s (2008) collaborative community model pulls together this stream of work, with its emphasis on fostering cognitive responsiveness, describing an organizational form in which reciprocal interrelating can be found in worker-customer, worker-worker, and worker-manager relationships.

Ashcraft's (2001) feminist bureaucracy model introduced a new approach to relational bureaucratic hybrids by explicitly integrating the emotional aspects of organizational life along with the rational, seeing each as part of an integrated whole that contributes to workers' capacity to perform their jobs, focusing in particu-

lar on integrating hierarchical and egalitarian modes of power. Lopez's (2006) organized emotional care model further explored the emotional aspects of organizational life, striving to understand the management of emotion in care work settings and illustrating how formal rules and flexible protocols enable caring relationships between workers and customers. Conceptualizing this stream of work more broadly, Dutton, Worline, Frost, and Lilius (2006) described the "social architecture of the organization"—the use of formal structures to enable delivery of compassionate responses.

Building on these two streams of work, we have articulated an organizational form that promotes both cognitive and emotional responsiveness. In sum, relational bureaucracy conceptualizes reciprocal interrelating in three relationship types that are fundamental to work organizations—worker-customer, worker-worker, and worker-manager—while theorizing how structures can embed these processes of reciprocal interrelating into roles, ultimately conceptualizing how these role-based reciprocal relationships foster attentiveness to the situation and to one another, enabling caring, timely, and knowledgeable responses that can be scaled up, replicated, and sustained over time.

### Contributions

Our model of relational bureaucracy offers four distinctive contributions to organizational theory. Most broadly, we have articulated a new theoretical framework for understanding how organizational forms can facilitate positive relationships among customers, workers, and managers. This framework addresses the intermeshing of personal life in organizations and impersonal bureaucratic structure, using a relational perspective to address the "spaces between" (e.g., Bradbury & Lichtenstein, 2000) and drawing on a number of theoretical lenses that privilege relationships (e.g., Dutton & Heaphy, 2003; Fletcher, 2007; Follett, 1949; Gittell, 2002a; Weick & Roberts, 1993). By framing the issue in basic terms, such as worker-customer, worker-worker, and worker-manager relationships, we have provided a framework that is both understandable and generalizable.

A second contribution of this model is our conceptualization of how formal organizational structures can embed reciprocal interrelating into the roles of participants. Role-based rela-

tionships help organizations achieve scalability, replicability, and sustainability by enabling individuals to come and go without disrupting the web of relationships through which work is accomplished, thus facilitating scheduling flexibility for the benefit of organizations as well as for the benefit of participants (Briscoe, 2006). Relational bureaucratic structures are designed to foster reciprocal connections between roles, rather than disconnecting them or connecting them through power hierarchies, as traditional bureaucratic structures are designed to do. Formal structures in relational bureaucracy thus serve as the social architecture of an organization (Dutton et al., 2006), one that systematically enables connectivity and caring throughout all levels of the organization. In doing so relational bureaucracy preserves role specialization while identifying structures that foster both cognitive and emotional connections between roles, consistent with relational approaches to job design (e.g., Gittell, Weinberg, Bennett, & Miller, 2008; Grant, 2007; Grant & Parker, 2009). Relational bureaucracy highlights the potential for protocols to structure patterns of interaction in a way that enhances connection and visibility into the whole, facilitating rather than inhibiting adaptation to changing needs (e.g., Adler & Borys, 1996; Feldman, 2003).

The third key contribution of our model is showing how reciprocal interrelating fosters participants' attentiveness to the situation and to each other, thus linking the growing literature on relational practice with the literature on high-reliability organizing. In effect, the relational bureaucratic model works because role-based reciprocal interrelating provides a foundation for developing collective awareness of both emerging situations and the needs of particular individuals in those situations, enabling the achievement of desired outcomes.

A final contribution of our model is the resolution of a fundamental paradox at the heart of any attempt to integrate the bureaucratic and relational forms: embedding reciprocal relationships into work roles to ensure their scalability, replicability, and sustainability while retaining their cognitive and emotional connectivity. One can question whether role-based relationships are "real," in the sense of having the potential for emotional connection that gives relationships their power to

shape organizational life in a positive way (e.g., Dutton, 2003; Dutton & Heaphy, 2003; Dutton & Ragins, 2007). However, caring can indeed exist in role-based relationships as well as in personal relationships. Relationships of reciprocity call for treating others as subjects rather than objects (Buber, 1937; Hoffer, 1985; Unger, 1975), thus supporting universalistic principles of caring for the needs of particular others. The structures of relational bureaucracy reinforce this reciprocal interrelating by embedding it into roles through hiring and training, structured conflict resolution, flexible protocols, relational job design, and so on.

These reciprocal relationships serve as a basis for coproduction, coordination, and leadership between roles while at the same time serving as a source of positive connection between individuals themselves. Consistent with this idea, Dutton and Ragins (2007), Fletcher (2007), and Fletcher and Ragins (2007) have argued that positive personal relationships need not precede positive role-based relationships and that role-based relationships need not preclude the development of personal relationships. Indeed, positive role-based relationships can serve as a starting point for the development of positive personal relationships, connecting even those who are dissimilar.

Clearly, our model of relational bureaucracy owes much to the theory of relational coordination, but relational bureaucracy extends that theory in three distinct and important ways. First, we conceptualize two additional processes of role-based reciprocal interrelating—relational coproduction between workers and customers and relational leadership between workers and managers—each with its own theoretical underpinning, in effect tripling the theoretical scope and impact of the model. Second, we develop the theoretical argument for how structures foster relational coordination, as well as relational coproduction and relational leadership, and show how these three forms of reciprocal interrelating foster participant attentiveness to the situation and to one another. Third, we extend relational coordination theory by exploring the significance of role-based relationships and how they foster universal norms of caring for particular individuals.

### Limitations and Directions for Further Theorizing

Although we have theorized the three forms of reciprocal interrelating as distinct from each other, we have reason to believe they are mutually reinforcing. We anticipate that engaging in one reciprocal relationship will increase the likelihood of developing reciprocity in one's other relationships, through positive spirals in which "positive acts are met with positive acts" (Kahn, 2007: 281). Conversely, engagement in a nonreciprocal relationship may increase the likelihood of developing nonreciprocity in one's other relationships. This mutual reinforcement can work both within and across role relationships. For example, the lack of relational leadership is likely to hinder the development of relational coordination, and the lack of relational coordination is likely to hinder the development of relational coproduction. Other role relationships might also be considered, such as reciprocal interrelating among customers, given the growing importance of customer communities. While synergies across role relationships and the development of additional role relationships are beyond the scope of this article, our model is amenable to extension in those directions.

Another limitation of the model articulated here is its overly simplistic, unidirectional path of causality between structures and relationships. Those who develop this model further should consider the possibility of a mutually reinforcing causality between structures and relationships as suggested by structuration theory (e.g., Orlikowski & Yates, 1994; Perlow, Gittell, & Katz, 2004). In particular, a relational bureaucratic theory of change needs to account for feedback loops between formal structures and the relationships they support. Rather than intervening in formal structures and expecting relationship patterns to change in response, a mutually reinforcing model of causality would suggest the need to intervene in both structures and relationships to enable an organization to break out of its current state into a new state of being (e.g., Fletcher, Bailyn, & Blake-Beard, 2009).

Reciprocal interrelating is an inherent human capability that has been key to human development (Mitchell, 2003; Wexler, 2006); however, our work identities tend to be entrained toward nonreciprocal interrelating. These nonreciprocal re-

lational patterns are deeply embedded in existing roles and self-concepts and are not easily changed. A relational bureaucratic theory of change will require deeper understanding of relational transformation and serious consideration of the role that our schools play in fostering nonreciprocal interrelating. A relational bureaucratic theory of change will also require explicit attention to power differentials, which tend to prevent people from engaging in reciprocal interrelating. One key insight for moving forward is that neither party, regardless of its relative power, can fully accomplish its task-related goals without cooperation from the other under conditions of task interdependence. The change process could begin, first, by establishing the salience of task-related goals to the parties; second, by enabling the parties to discover their task interdependence; third, by creating a relational space in which to experiment with new patterns of interrelating; and fourth, by changing formal structures to support these new patterns.

### Conclusion

We have theorized how formal structures can reinforce reciprocal relationships between worker and customer, worker and worker, and worker and manager—each characterized by shared goals, shared knowledge, and mutual respect—by embedding them into roles. In so doing, relational bureaucracy fosters caring, timely, and knowledgeable responses to others—responses that are scalable, replicable, and sustainable over time. There are several managerial implications of this relational bureaucratic model. For example, in the human service sector there has been pressure for small organizations to merge to achieve economies of scale but also concerns about undermining the caring that is central to human services, as well as concerns about creating diseconomies of scale owing to the fragmentation that accompanies bureaucratization. The relational bureaucratic form has the potential to mitigate these trade-offs and is therefore useful when endurance is valued but must not be achieved at the expense of caring, timely, and knowledgeable responses to others.

The most fundamental theoretical insight of relational bureaucracy is arguably its resolution of the tension between personal and role-

based relationships in organizations. As Buber (1937: 67) reminds us, the reciprocity that we find in high-quality relationships is universalizable. Similarly, Gilligan (1982) describes female development as particularizing norms through an ethic of caring and male development as universalizing norms through an ethic of rights. Together, Gilligan (1982) argues, the two represent a more complete moral development than either on its own. Taking these insights to the organizational level, Heimer (1992) argues that the key is to move beyond the universalistic/particularistic dichotomy by applying universalistic principles to the treatment of particular individuals. Our conceptualization of relational bureaucracy provides substantial new insight into how organizations can do just that, as well as insight into the outcomes they can expect to achieve in return.

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