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The Behavioral Foundations of Representative Bureaucracy

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ABSTRACT

Representative bureaucracy is a values-based theory of bureaucratic decision making. Its key assumption is that a bureaucrat's demography shapes her pre-organizational socialization, values, and ultimately her decisions, in a way that can advance the interests of a represented client or group (i.e., active representation). However, scholars have not critically examined the presumed links among these four factors. We review the literature and make an argument for representative bureaucracy scholars to incorporate a psychological perspective to better understand the behavioral mechanisms that influence active representation. We discuss the tripartite classification of the mind, dual-process theories of decision making, identity theory and the deservingness heuristic as theoretical perspectives scholars can use to investigate the behavioral foundations of representative bureaucracy.

"*The empirical literature on representative bureaucracy has found many correlations between passive representation and bureaucratic outcomes but has not gone down to the micro-level to determine exactly how these relationships come to exist*." (Meier & Morton, 2015, p. 107)

INTRODUCTION

All democracies wrestle with the tensions inherent in giving policy making authority and power to unelected bureaucrats. Many political scientists engage this problem through the lens of accountability and the political control of the bureaucracy. In this view, bureaucratic discretion is a necessary element which can (and generally should) be constrained through institutional arrangements and incentives (Epstein and O'Halloran 1999; Epstein and O'Halloran 1994; Huber and Shipan 2002; McCubbins, Noll, and Weingast 1987). Another view in this larger school demonstrates legislatures attempt to leverage bureaucratic discretion towards their preferred policy objectives by using civil service systems to develop unique expertise in bureaucrats (Gailmard and Patty 2007; Gailmard and Patty 2012).

Other scholars are more comfortable embracing discretion as a way to increase the quality of representation in a society (Meier and Bohte 2001; Meier and Morton 2015). Under representative bureaucracy, bureaucratic discretion can promote the interests of diverse social groups that sometimes lack representation by the state through traditional policy making processes (Krislov 1974; Mosher 1968). In its simplest form, the theory of representative bureaucracy is a theory of bureaucratic discretion which suggests a connection between bureaucrats' demographic characteristics and their behavior (i.e., the ways in which they exercise their discretion).

There are two components of representative bureaucracy: passive representation and active representation (Kennedy 2014; Mosher 1968). Passive representation is an organization-level phenomenon and increases as the demographic characteristics of an organization begin to mirror those of the population it serves. An idea underlying the theory of representative bureaucracy is that passive representation leads to active representation. Active representation occurs when bureaucrats engage in policy-making behavior that advances the interests of individual citizens from particular demographic groups or those groups as a whole. In other words, active representation can be understood as "decision-making behavior on the part of a specific group of civil servants, which tends to affect systematically the resource allocation of a specific group of citizens" (Hindera 1993, p. 419).

How do bureaucrats advance the interests of (disadvantaged) groups? As we far as we can tell, at the individual-level the underlying rationale of representative bureaucracy is that 1) a bureaucrat's demographic characteristics shape her 2) pre-organizational socialization experiences and 3) values which then shape her 4) policy-relevant decision making in a way that advances the interests of clients of the same demographic group (Krislov 1974; Meier 1993; Mosher 1968; Selden 1997). This is what we will subsequently refer to as the logic underlying the theory of representative bureaucracy.

The epigraphical quote suggests that despite a seemingly broad acceptance of the logic of representative bureaucracy, a thorough understanding of these linkages and the mechanisms that support them is not apparent in the literature. In addition, we believe there is a lack of serious attention given to the psychological mechanisms that influence the process of active representation. Despite this paucity of behaviorally focused research on representative bureaucracy, a few studies call scholars to advance our understanding of the micro-foundations of representative bureaucracy (e.g., Meier 2019; Meier and Morton 2015).

Our goal for this paper is to convince the reader of the value of situating the study of representative bureaucracy within a research framework based in psychology. We see this as a complement to, rather than a replacement of, previous approaches to scholarship on representative bureaucracy. This paper proceeds as follows. First, we clarify key perspectives and terms we discuss throughout this paper. Second, we unpack the meaning of values and value-based bureaucratic decision making. Next, we provide an overview of the theory of representative bureaucracy and present what we see as some of the limitations currently facing this body of scholarship. We then discuss some of the challenges in translating the theoretical logic of representative bureaucracy into practice after which we argue for the need for a psychological perspective on representative bureaucracy. Following this, we cover two psychological elements that likely influence the processes relevant to active representation: the tripartite classification of three decision making processes (affect, cognition, and conation) and dual-process theories of decision making (System 1 and System 2). We then discuss two theoretical frameworks which might help scholars analyze the underlying logic of representative bureaucracy: identity theory (both social identity theory and [role] identity theory) and the deservingness heuristic. For each, we describe them and discuss their application to the study of representative bureaucracy.

A CLARIFICATION OF KEY TERMS

We want to be clear about the perspective we take. We also need to clarify how we will use a few terms. We use the terms psychology, psychological, and behavioral frequently throughout this paper. Although we draw on literature from both cognitive psychology and social psychology, one intention is to highlight the value of insights from cognitive psychology for the theory of representative bureaucracy. We think of this as an interest in understanding how different affective, cognitive, and conative processes are relevant to bureaucratic decision making. Additionally, our discussion of identity theory draws on social psychology.

Our use of the terms behavior and behavioral fit these perspectives. Understood in this way, we believe the ethos of our argument is very much in line with a definition of behavioral public administration as "*the analysis of public administration from the micro-level perspective of individual behavior and attitudes by drawing on insights from psychology on the behavior of individuals and groups.*" (Grimmelikhuijsen, Jilke, Olsen, and Tummers 2016, p. 45). We should note that our discussion of psychology extends beyond subjects more commonly addressed in behavioral public administration research (e.g., bounded rationality, cognitive bias, and nudging) (Battaglio Jr., Belardinelli, Bellé, and Cantarelli 2019).

Second, we believe it is important to highlight a distinction in the use of the term "micro" that we feel is relevant to the theory of representative bureaucracy. Most scholars of public administration are probably familiar with the concept of "micro-level" found in the preceding quotation as pertaining to the individual—e.g., "*Micro-level research focuses on individual-level attributes and phenomena of various kinds, including people's characteristics, beliefs, or interactions with others.*" (Jilke, Olsen, Resh, and Siddiki 2019, p. 245). This approach is in line with the opening quote from Meier and Morton (2015). However, going "down" a level, in a few places we use the terms micro-foundations or micro-level to signify internal mental processes relevant to bureaucratic decision making.

VALUES AND VALUE-BASED BUREAUCRATIC DECISION MAKING

In the words of one scholar, theories of administrative responsibility that align with representative bureaucracy "assume that the mechanisms of responsiveness are the linkage of social characteristics to values and values to behavior and policy" (Saltzstein 1979, p. 467). Thus, as opposed to institutional theories of bureaucratic discretion, the theory of representative bureaucracy is a values-based theory of bureaucratic discretion (Meier and Morton 2015). One might be prone to ask, what is meant by a values-based theory of decision making?

We believe scholars of representative bureaucracy face a challenge clarifying the concept of *value*. Value, as it is commonly used in the representative bureaucracy literature, implies some subjective assessment that builds off or out of an individual bureaucrat's identity. At some levels of analysis, it has been acceptable to "black box" the specific elements that pertain to this process. However, at the micro-level analysis, it is essential to adequately conceptualize and describe the processes in question.

When talking about values, especially in the sense of values relating to the public and public values more specifically, beyond a few "very general areas of agreement there is remarkably little consensus" (Bozeman 2007, p. 114). This is due to the fact that the word "value" holds several distinct conceptual meanings relevant to public policy (Bozeman 2007; see especially Chapter 7). It is beyond the scope of this paper to grapple with the range of these distinct meanings. Nonetheless, several are immediately relevant to the idea we wish to convey.

As we have discussed, value, as it is commonly used in the representative bureaucracy literature, implies some subjective assessment that builds off or out of an individual bureaucrat's demographic identity. Another common use of the term value pertains to a system for valuing (the outcomes of) choices (i.e., expected utility theory). According to this perspective, "Value-based decision-making is pervasive in nature. It occurs whenever an organism makes a choice from several alternatives based on the subjective value that it places on them" (Rangel, Camerer, and Montague 2008, p. 545). This problem of subjectivity is related to a third use of the term value that pertains to the contextual nature of bureaucratic decision making in public agencies. We see this when, for example, people talk about different "values" that are important to managing in the public sector. Further complicating matters is that these values can be ends towards which we strive or ends in-and-of themselves. Taken in this way, value becomes an umbrella term that attempts to capture different mental processes as belonging to the same type of (allocative) decision making process.

The following example highlights the need for considering the complexity of value in studying representative bureaucracy. Arguably, the leading scholar on representative bureaucracy recently advanced the following hypothesis: "Bureaucrats are more likely to act for clients who are in the greatest need" (Meier 2019, p. 41). This hypothesis is intuitively appealing. Yet, it is unclear what is meant by need. It is possible that what is assessed as "need" could differ depending on the 1) characteristics of the individual making the decision and the client(s) being served, 2) the options before the individual, and 3) the context of the decision. How can we understand *how* public managers allocate public resources without a sense of what is meant by need (or other values bureaucrats might use to assess a decision)? In an objective need-based allocation setting, allocation decisions could be based on some "objective" sense of deservingness. Yet, this is merely a normative claim about how government should work. In the real world—e.g., in a rules-based agency setting in which bureaucrats make needs-based decisions—the question of need or how to allocate based upon need may be undefined to allow for bureaucratic discretion. In this view, need necessarily becomes value based. It is susceptible to perception and thus carries a psychological element.

Bozeman speaks to the psychological aspect of value-based decision making when he says, "A value is a complex and broad-based assessment of an object or set of objects (where the objects may be concrete, psychological, socially constructed, or a combination of all three) characterized by both cognitive and emotive elements, arrived at after some deliberation, and, because a value is part of the individual's definition of self, it is not easily changed and it has the potential to elicit action" (Bozeman 2007, p. 117).

Bozeman's definition of value is relevant to the theory of representative bureaucracy. In some ways, it is like the logic of representative bureaucracy, especially in how it talks about value being related to an individual's definition of self and how it can influence action. However, in other ways, it circumscribes our understanding of relevant processes. For example, although he suggests that "value" has psychological elements, it is unclear to us how much deliberation is necessary to claim something is a value. For example, it is not clear the deservingness heuristic would fit Bozeman's definition of a value. Nonetheless, it clearly is relevant to the study of allocating public goods and services through a bureaucracy (Jilke and Tummers 2018). Nor do we necessarily believe that values are not easily changed. In public organizations where context matters, the values we use to understand our decisions could easily change given any number of personal and organizational factors.

OVERVIEW AND LIMITATIONS OF THE THEORY OF REPRESENTATIVE BUREAUCRACY

The Theory of Representative Bureaucracy

According to the theory of representative bureaucracy, bureaucratic discretion can promote the interests of historically disadvantaged groups whose interests and needs are often overlooked or are not sufficiently represented in policy making processes (Krislov 1974; Mosher 1968). The theory expects that public servants with bureaucratic discretion will better represent citizens with shared values—i.e., they will better advocate for them. These values, it is argued, are largely shaped by pre-organizational socialization experiences which are themselves believed to be shaped by the demographic characteristics of the individuals involved in a scenario. In this sense, bureaucrats are argued to "represent" those with shared demographic characteristics and the proposed mechanism that aligns demographics and representation decisions is "values." In short, a public servant's decision making is expected to be more responsive to those citizens with whom they share demographic characteristics (and therefore values) (Bradbury and Kellough 2008; Dolan 2002; Meier and Nigro 1976). However, even if we could pin down what we mean by values, one scholar argues that "the value-congruence test of responsiveness is inadequate on theoretical grounds as a complete test of the theory of responsiveness" (Saltzstein 1979, p. 470).

Limitations in the Study of Representative Bureaucracy

Frederick Mosher wrote, "We know too little about the relationship between a man's background and preemployment socialization on the one hand, and his orientation and behavior in office on the other" (1968, p. 13). More recently, Kenneth Meier noted, "After decades of research, however, the evidence is mixed in terms of the translation of demographic representation into public policy outputs and outcomes" (Meier 2019, p. 39). We will discuss how previously employed frameworks for studying representative bureaucracy leave scholars facing challenges to demonstrate the presumed links among the bureaucrat's demography, pre-organizational socialization, values, and policy making decisions. In this section, we highlight previous individual-level studies that consider the role of contextual factors have not sufficiently addressed the psychological processes that capture the logic underlying the theory of representative bureaucracy.

Although some of these studies examine the relationship between a bureaucrat's demographic origins and policy-relevant values, they present limitations (Bradbury and Kellough 2008; Dolan 2002; Rosenbloom and Featherstonhaugh 1977). For example, Bradbury and Kellough (2008) found attitude congruence between African American administrators and African American citizens regarding implementing local government policies that promote the interests of African American communities. The finding suggested that the bureaucrat's demography—in this case, race—serves as a predictor of her policy-relevant values. However, the finding did not further examine whether value congruence shapes the administrators' behaviors. Rather, this study only suggested "the potential for active representation" (Bradbury and Kellough 2008).

Another line of research has investigated the demographic match between the bureaucrat and the client as well as the match's impact on client outcomes (Nicholson-Crotty, Grisson, Nicholson-Crotty, and Redding 2016; Theobald and Haider-Markel 2008). For instance, Nicholson-Crotty et al. (2016) found that African American students are more likely to be referred to a gifted program when they are matched with African American teachers. The authors showed this relationship is partially mediated by the teachers' ratings of students' academic performance and classroom behaviors; such ratings are proxy measures for teachers' values regarding advocating for co-racial students.

We acknowledge the value of these research contributions. However, these studies still assume the bureaucrat's individual values used in allocative decision making and thus the *process* of active representation. More specifically, we observe scholars using the term "values" as a proxy or shorthand for something or set of phenomena that they "observe"—or, more precisely, do not or cannot observe but would otherwise like to observe. An additional challenge pertains to understanding the temporality of values. That is, we can look at values as stable beliefs (i.e., attitudes) or values as some perspective or framework (e.g., equity) that applies to a given situation. These are conceptually distinct and could thus, ostensibly, influence decision making in different ways.

Other research more explicitly highlights that a bureaucrat's demographic characteristics alone may not be a sufficient indicator for her policy-relevant values and decisions (Andersen 2017; Kennedy 2014; Thompson 1978). In her study of the Farmers Home Administration's Rural Housing Loans program, Selden (1997) showed that bureaucrats' role adoption of serving the minority interests, rather than their race, matters more in their making decisions to award rural housing loans to racial minority clients. In the same research setting, Sowa and Selden (2003) found that bureaucrats, regardless of their race, who perceive a high level of discretion at work tend to award loans to racial minority clients. These studies assume individual-level processes that are implicitly presupposed by the theory of representative bureaucracy and through which bureaucrats decide to advance the interests of socially disadvantaged groups.

Other individual-level factors, such as motivation and perceived risks, are relatively underexplored in the representative bureaucracy literature. Meier (2019) recently proposed several hypotheses regarding the role of individual factors that shape the passive-active representation link. We find value in pursuing this line of inquiry by drawing insights through an approach incorporating psychology.

In addition to a bureaucrat's demographic characteristics, organizational-level studies investigate several contextual factors that condition the link between passive representation and active representation—for example, hierarchy, professionalization, organizational socialization, and organizational mission (Keiser, Wilkins, Meier, and Holland 2002; Meier and Morton 2015). Many organizational-level studies have looked at the correlation between the demographic composition of an organization and policy outputs or outcomes pertaining to certain client groups to demonstrate the presumed links of interest (Hindera 1993; Keiser et al. 2002; Lim 2006; Wilkins and Keiser 2004). However, these studies face difficulties in disentangling the processes that shape active representation from potential confounding factors and thus have only been able to speculate about bureaucrats' values and behavior.

CRITIQUING THE "CAUSAL CHAIN" OF REPRESENTATIVE BUREAUCRACY

As we mentioned, most studies that focus on representative bureaucracy at the individual-level do not focus on decision making processes. We believe there is value in critically examining each link in the logic of representative bureaucracy theory (the bureaucrat's demographic characteristic, pre-organizational socialization experiences, value, and behavior). We discuss and critique these links and assumptions in the following sections.

Link Between Demographic Origins and Pre-organizational Socialization Experiences

Socialization refers broadly to the life-long process by which individuals acquire the values, norms, attitudes, and beliefs of a society from familial and non-familial sources (Arnett 1995; Maccoby 1994). Demographic origins, such as race, gender, and religion, are associated with variation in pre-organizational socialization experiences (Meier, 1993; Selden, 1997). Among several demographic origins that are bases for pre-organizational socialization experiences, we discuss race, as an example that has been predominantly examined in studies of representative bureaucracy (Bishu and Kennedy 2019; Kennedy 2014). Most research on racial socialization focuses on African-American families (Hughes et al. 2006; Lesane-Brown 2006; Neblett, Smalls, Ford, Nguyên, and Sellers 2009). Scholars find, for example, that in comparison to White parents, African American parents provide children with more socialization messages related to the values, norms, and behaviors of their race (Boykin and Toms 1985; Brown and Tylka 2011). In addition to their parents, African American children receive socialization messages from people outside their families, such as peers, teachers, and the media (Barr and Neville 2008).

Racial socialization has multiple dimensions, such as racial pride messages, racial barrier messages, egalitarian messages, self-worth messages, negative messages, and socialization behaviors (Hughes et al. 2006; Lesane-Brown 2006; Neblett et al. 2009). Although the discussion of each dimension in detail is beyond the scope of our paper, we focus on two of the most common dimensions investigated in previous research: racial barriers and racial pride (Cooper and McLoyd 2011; Dotterer, McHale, and Crouter 2009; Hughes et al. 2006). Racial barrier socialization emphasizes African American children's awareness of and strategies for coping with racial inequalities and discrimination. Racial pride encourages African American children to embrace their African heritage and take positive attitudes toward their racial group. Recognizing multiple aspects of racial socialization, Stevenson (1994) acknowledges two categorizes: protective and proactive. The former is like racial barrier socialization, in that it consists of messages and practices related to awareness of racial inequalities and oppression, and strategies for coping with those. The latter is more in line with racial pride, as messages and practices related to African American unity, heritage, and pride are promoted.

Additionally, racial socialization experiences vary among individuals of the same race. Several factors, such as age, socioeconomic status, education, and gender, explain individual differences in the content and frequency of racial socialization messages received from familial and non-familial sources (Hughes et al. 2006; Lesane-Brown 2006). For example, some studies have revealed that African American boys receive more racial barrier messages than African American girls do from their parents (Bowman and Howard 1985; Thomas and Speight 1999). This may be due to the social tendency to view African American boys as more threatening than African American girls, and thus more apt to discriminate against the former than the latter (Fischer and Shaw 1999; Sampson and Laub 1993). As another example, some research has shown that African American parents of higher socioeconomic status, and who have greater awareness of and sensitivity to racial inequalities and discrimination, are more likely to provide their children with both racial pride and racial barrier messages (Caughy, O'Campo, Randolph, and Nickerson 2002; Hughes and Chen 1997).

These insights suggest that it is difficult to assume a monolithic pre-organizational socialization for any identity group. More specifically, given that individuals vary in their personal and social situations, we should not take for granted that all members of a demographic group have similar pre-organizational socialization experiences that could serve as predictors for policy-relevant values or active representation. Instead, we argue that scholars should consider different types of racial socialization (e.g., racial pride, racial barrier) and how these different forms of socialization may lead to similar or different policy-relevant values among bureaucrats of the same race. Additionally, scholars might consider other types of socialization experiences beyond just those pertaining to race. Although we focused on racial socialization, literature on other types of socialization (e.g., gender socialization and religious socialization) has also highlighted variation in socialization processes and outcomes among members of the same identity group (Carter 2014; Martin, White, and Perlman 2003).

Link Between Pre-organizational Socialization Experiences and Policy-Relevant Values

Research has revealed that racial socialization shapes people's racial identities (Hughes et al. 2006; Lesane-Brown 2006), which can be understood as "an enduring, fundamental aspect of the self that includes a sense of membership in an ethnic group and the attitudes and feelings associated with that membership" (Phinney 1996, p. 922). For example, Thompson (1994) found that the more frequently African Americans received racial socialization messages from adults in their families, the stronger these experiences were related to psychological and sociopolitical dimensions of their racial identities. Demo and Hughes (1990) showed that different types of racial socialization messages (e.g., assertive, cautious, and individualistic) are associated with African American racial identities characterized as African American separatism and a sense of closeness to other African Americans. Although it is not mentioned explicitly in the racial socialization literature, we argue that racial identity that is developed through life experiences encompasses personal values that can be understood as "an ideal to which the individual subscribes; it represents basic convictions that a specific mode of conduct is preferable (in a personal or social sense) to any other" (McKenna 2012, p. 269).

Racial socialization experiences, including both proactive and protective types (Stevenson, 1994), may be associated with minority bureaucrats' tendency to advocate for minority citizens whom they serve. That is, minority bureaucrats who have gained pride in their racial groups and awareness of race-based inequalities through racial socialization experiences prior to organizational entry could be more empathetic to the challenges and needs of co-racial citizens and be motivated to represent them. We argue that the representative bureaucracy literature mainly assumes the positive outcome of racial socialization experiences prior to organizational entry; the bureaucrat will advocate for citizens from the same demographic group, as they want to improve the status and well-being of the group. However, given that racial socialization experiences prior to organizational entry can also shape individuals' racial identities in a negative manner (e.g., race-related stress, silence about racial issues, and assimilation to the majority racial group), the link between pre-organizational socialization experiences and values should be examined more critically. For instance, minority bureaucrats who received mostly negative messages about their race during their childhoods can become passive and reluctant to foster racial equity in policy making and implementation.

Link Between Policy-Relevant Values and Bureaucratic Behavior

Frank Thompson wrote, "The concept of active, or substantive, representation means more than an administrator sympathizing with his/her racial group; it means more than an official having the same values as that group. Instead, it focuses on the actual behavior of officials, on whether they act for or on behalf of their racial communities" (1976, pp. 202–203). Yet, little representative bureaucracy research has directly addressed the link between policy-relevant values and bureaucratic behavior. Although a bureaucrat's value serves as a precursor for her active representation, this link can be weakened by personal, organizational, and environmental factors (Keiser et al. 2002; Meier and Morton 2015).

The theory of planned behavior offers a framework for discussing whether and how an individual's attitudes and values translate into her behavior. According to the theory, an attitude, defined as "the degree to which a person has a favorable or unfavorable evaluation or appraisal" of the behavior in question, influences the behavior along with subjective norms (i.e., others' expectations about the behavior) and perceived behavioral control (i.e., belief in the possibility of successfully executing a behavior) by behavioral intention (Ajzen 1991, p. 188). In addition, these three predictors can shape behavior through intention in an interactive manner (Ajzen 1991, 2002).

Aligned with this viewpoint, previous research suggests that the potential for active representation can be facilitated or hindered by a variety of factors. For example, organizational socialization experiences can outweigh personal socialization experiences (Meier and Nigro 1976; Romzek and Hendricks 1982; Wilkins and Williams 2009), which is linked to the potential role of subjective norms in suppressing the bureaucrat from pressing the interests of citizens of the shared demographic characteristic. In both the representative bureaucracy and street-level bureaucracy literatures, the question remains whether individual values shaped by pre-organizational socialization experiences remain over organizational tenure (Maynard-Moody, Musheno, and Musheno 2003; Oberfield 2010). As minority bureaucrats face peer and organizational pressure, ostensibly they would be less likely to pursue active representation under situations that do not support such advocating behaviors.

THE NEED FOR A BEHAVIORAL PERSPECTIVE ON REPRESENTATIVE BUREAUCRACY

> "*Public administration needs to engage with theories and established facts in psychology. Any scientifically sound study of perception, attitude formation, or decision making in our field must in some sense correspond to the thousands o*Olsen, 2015, p. 325)

In sum, we observe three challenges or limitations to previous scholarship on representative bureaucracy. First, observed demographic indicators present limitations as proxies of individual values. Second, our discussion of the logic underlying the theory of representative bureaucracy suggests that scholars have yet to embrace a perspective that can adequately describe the processes purported to foster active representation. Third, students of representative bureaucracy can benefit from more research that examines the role of individual and psychological factors that mediate, moderate, or otherwise influence the relationship between passive representation and active representation.

We believe one of the longstanding challenges in developing the theory of representative bureaucracy is a disconnect between the theory's assumptions and the approaches and empirical perspectives scholars use to study it. To be clear, we believe representative bureaucracy is fundamentally a theory that uses psychology to motivate our understanding of how bureaucrats make decisions. Thus, to advance our understanding of representative bureaucracy requires that we advance our understanding of the micro-foundations of active representation. For example, we argue that research should capture actual *decisions* in addition to the *outcomes* of decisions. In other words, instead of assuming (psychological) processes, we believe future research should work to observe and understand the (psychological) factors and processes that shape active representation.

Echoing Meier (2019), we believe future research on representative bureaucracy requires fresh perspectives that will allow us to understand the assumed theoretical logic. We believe an approach which rigorously considers both decision processes and outcomes can help us to advance scholarship on the theory of representative bureaucracy on theoretical, methodological, and normative grounds.

BEHAVIORAL REPRESENTATIVE BUREAUCRACY

Behavioral Public Administration

Earlier, we situated representative bureaucracy within the broader literature on bureaucratic discretion. In economic terms, discretion exists when an individual perceives the latitude to decide among competing alternatives (Marvel and Resh 2015). In the study of bureaucratic decision making (i.e., discretion), we want to observe a bureaucrat's choice among a set of options in a decision set after having some sense of a bureaucrat's values (not after *presuming* those values). Scholars use various methods of observation to capture decision making. Our perspective advocates the use of a behavioral perspective to isolate specific steps in the way that humans process information to understand decision making processes. We argue scholars should make the psychological processes that may influence bureaucratic decision making an active part of the program of research on active representation. We see this to be in line with the broader movement to understand the behavioral foundations of public administration (Grimmelikhuijsen et al. 2016; Nørgaard 2018). This will both allow and encourage scholars of representative bureaucracy to focus on 1) individuals and 2) decisions as appropriate units of analysis in this area of research.

Evidence for a Behavioral Representative Bureaucracy

Evidence suggests that citizens may receive positive psychological benefits from government organizations without any action on the part of the bureaucracy (Riccucci, Van Ryzin, and Jackson 2018; Riccucci, Van Ryzin, and Lavena 2014; Riccucci, Van Ryzin, and Li 2015; Van Ryzin, Riccucci, and Li 2016). This body of work suggests that symbolic representation has a psychological dimension wherein citizens' perceptions of legitimacy and trust in government may further influence the satisfaction they feel towards government (Riccucci and Van Ryzin 2016). In short, psychological processes in citizens influence the perceived quality of representation. These findings raise important questions for the study of representative bureaucracy in bureaucrats as well. Specifically, how might similar processes influence how bureaucrats choose to represent citizens? What role does perception play in how bureaucrats engage in active representation?

Unfortunately, scholars have only recently turned their attention to examining the psychological processes underlying active representation in bureaucrats rather than presume a direct assumption of values from social origins (Riccucci and Van Ryzin 2016). As Andersen noted, the representative bureaucracy literature "overlooked the role of attitudes or maybe implicitly assumed a direct link between bureaucrats' background, attitudes, and active representation" (Andersen, 2017, p. 401). The author demonstrated that a normative values frame led to differences in a minority-supporting policy. Additionally, Marvel and Resh (2019) provided evidence that prosocial motivation has an implicit, automatic processing foundation.

BEHAVIORAL FOUNDATIONS OF REPRESENTATIVE BUREAUCRACY: THE TRILOGY OF THE MIND AND THE DUAL-PROCESSING PERSPECTIVE

Despite some initial evidence that psychological processes representation, the processes pertaining to the logic of the theory of representative bureaucracy remain underexplored. To understand how a behavioral perspective can inform the study of representative bureaucracy, we turn to two well-validated perspectives from psychology. The first involves three distinct mental processes that influence how we process information. The second involves "dual-process" theories of human decision making.

The Trilogy of the Mind

The tripartite classification system distinguishes three unique mental processes: affect, cognition, and conation (or volition) (Hilgard 1980). Colloquially, we might refer to these as feeling, knowing, and willing, respectively. Affect pertains to our emotions, feelings, moods, etc. When someone is visibly angry, that is an example of affect driving their decision making. Cognition refers to our thinking—what we experience, know, learn, sense, etc. Descartes' *cogito ergo sum* is a classic example. Conation pertains to the desire or drive to perform an action. An example might be someone overcoming adversity to achieve some feat—e.g., Derek Redmond finishing his 400 m race at the 1992 Olympics with the help of his father despite tearing his hamstring.

A large body of research demonstrates connections between attitudes and cognition as well as attitudes and behavior (Ajzen 2001; Salzman and Fusi 2010; Todd, Miskovic, Chikazoe, and Anderson 2020). Yet, as one scholar argued, "The interplay of emotions and cognition in human judgment and decision making… has received scant attention within public administration" (Nørgaard 2018, p. 4). For this reason, how these processes relate to one another deserves our attention and understanding how affective, cognitive, and conative processes relate to one another is a critical aspect of refining the theory of representative bureaucracy.

The Dual-Processing Perspective

In a recent article, Meier argued that active representation may "rely on a subjective assessment of benefits and costs, but we know little about the motivations of individual bureaucrats in such cases" (2019, p. 47). If we accept the premise of this claim, we must also recognize we have a limited understanding of the sources of these motivations in individual bureaucrats. This is an important point; one we think scholars of representative bureaucracy should examine in more detail. Although much of the literature seems to presume that active representation is the result of a *deliberate* process, we do not *know* that this is the case.

The dual-process perspective acknowledges two decision making systems (conscious and unconscious) (Evans 2008; Schneider and Shiffrin 1977; Shiffrin and Schneider 1977; Stanovich and West 2000). The first, "System 1" is "quick" and involves automatic processing of information and decisions of which we are often unaware. This is the system that most commonly leads us to observe "bias" in how individuals respond to situations. Our brains use heuristics (i.e., System 1) to help us navigate a variety of decision making constraints and there is evidence these heuristics improve the quality of our decision making (Gigerenzer and Gaissmaier 2011).

The second, "System 2," is "slow." It is controlled. We are conscious of decisions made using this process. The following example may help us to distinguish these systems: add 2 + 2 or add 4,672 + 92,839. Most adults will use System 1 for the former but require System 2 processing for the latter.

Although most dual-process research focuses on cognition (Hilgard 1980), affective heuristics play a critical role in helping us navigate the social world (Bodenhausen 1993). We believe this is particularly relevant to the theory of representative bureaucracy through affect via the affect infusion model (AIM). The AIM attempts to explain how affect can influence our thinking and judgments via four judgmental strategies and processes: the direct access strategy, motivated processing, heuristic processing, and substantive processing (Forgas 1995). Following a continuum of these four strategies, affect is argued to play little or no role in the direct access strategy but increases throughout these strategies to the point that affect can play a major role in substantive processing. To illustrate, we can think of a bureaucrat performing a routinized task with which they enjoy a high level of proficiency (direct access strategy) or a new task. The former relies on easily retrievable knowledge and is less likely to involve affective processing. The latter requires the bureaucrat to "select, learn, and interpret novel information" and increases the probability that affect plays a role in the decisionmaker's choice (Forgas 1995, p. 47).

Additionally, although affective processing is primarily understood as a System 1 phenomenon, additional research by Forgas (2000) suggests that the management of different types of feelings—e.g., *emotions* (e.g., anger) and *moods* (e.g., feeling good or bad)—requires different systems of managing these feelings (Forgas 2000).

Application of These Perspectives to Representative Bureaucracy

As we have stated, the fundamental questions of interest to scholars of representative bureaucracy concern the links in the logic underlying the theory of representative bureaucracy. The tripartite classification system and dual-process theory allow scholars to question the assumptions we hold about this logic. Rather than thinking of these linkages as static or pre-determined, we believe these perspectives shed light on the complexity of representative bureaucracy that is heretofore underexplored. It is both a theoretical and empirical problem that, *a priori*, we may be unaware which mental processes are relevant in a situation without further investigation.

In some situations, a particular demographic identity may be salient in a bureaucrat's resource allocation decision making and they may have the discretion to weigh this factor strongly. But does this weighting arise from an automatic or a deliberate mental process? The idea that System 1 processes translate passive representation into active representation naturally is a simplifying assumption that presents two questions. First, it is assumed to be predictable. Second, it comes in contrast to the fact that bureaucrats operate in an institutional environment that may attempt to limit their discretion in several ways—e.g., through organizational socialization and training—which may induce more deliberative and reasoned decisions (i.e., System 2 thinking). Ergo, although humans are prone to use heuristics, bureaucrats operate in a world of formal rules, informal norms, political pressures, and social incentives that are designed to shape decision making processes. These constraints are the result of accountability problems and may create incentives to induce bureaucrats to process information in certain ways and, ostensibly, more objectively. However, this objectivity does not always exist in practice.

Although we often think of bureaucracies as a form of organization that can rationalize and systematize our decision making, automatic processing may play a role in making bureaucracies less "rational," especially through affect. The automatic processing of *affect* has been shown to have an impact on aspects of decision making that we typically think of as "*cognitive*," like risk assessments (Finucane, Alhakami, Slovic, and Johnson 2000; Slovic, Finucane, Peters, and MacGregor 2004). Additionally, many public employees operate in high-stress, high-workload environments. These, and other contextual factors, might trigger affective processes (e.g., influence feelings), which can then shape allocation decisions. To this point, previous work on coping suggests a potential role for coping behaviors in frontline work because "street-level bureaucrats who share the same characteristics as clients" may perceive them "as more motivated and help them more" (Tummers 2017, p. 160). This brief discussion suggests that our understanding of the role of *affect* in the theory of representative bureaucracy may currently be undertheorized.

Although in many cases it may be suitable to focus on a single mental process in our research, this discussion of these perspectives should give us pause regarding this assumption. To this point, as we will discuss in the next section, social identity theory can be understood in terms of both affect (i.e., attitudinal responses to in-group classifications) and cognition (i.e., in- and out-group classifications) (Stets and Burke 2000). In sum, the circumstances of a situation or the research question we wish to answer may call for us to consider different mental processes and the preceding discussion suggests that this could affect our understanding of representative bureaucracy in important ways.

BEHAVIORAL FOUNDATIONS OF REPRESENTATIVE BUREAUCRACY: SOCIAL IDENTITY THEORY AND IDENTITY THEORY

Previously, we discussed some of the challenges facing the study of representative bureaucracy due to a lack of understanding of the role of identity in active representation—as a mechanism, identity has not been sufficiently theorized.

A person's identity is formed both individually and in the context of the social structure and key referents therein: "The self is reflexive in that it can take itself as an object and can categorize, classify, or name itself in particular ways in relation to other social categories or classifications" (Stets and Burke 2000, p. 224). As we previously discussed, identity can shape the values a person holds and thus her choices about actions to take. In this way, how we think about identity may be critical to the way we conceptualize and study representative bureaucracy. Social identity theory and identity theory discuss groups and roles, respectively, but each theory uses a different conceptualization of identity as the basis for its outlook on the concept.

Social Identity Theory

In social identity theory, which emphasizes intergroup relations, a person uses demographic attributes such as gender and race to categorize others into in-group and out-group categories (Abrams and Hogg 2006; Oakes, Haslam, and Turner 1994). Individuals show favoritism towards in-group members in order to promote positive group images and satisfy psychological needs such as "needs for control, self-esteem, and belonging and meaning" (Greenaway, Cruwys, Haslam, and Jetten 2016, p. 303). Interestingly, identity loss appears to negatively affect these same needs. In other words, activating identity relationships protect individual well-being over both the short- and long-term and guard against its degradation in the event of identity loss. In the presence of (perceived) threats or challenges to their group identities, individuals may exhibit hostility toward out-group members through group-based prejudices, stereotypes, and discrimination (Oakes et al. 1994; van Knippenberg, De Dreu, and Homan 2004). From a social identity theory perspective, a person who has discretion in allocating resources is apt to grant more benefits to in-group members than to out-group members (Tajfel 1981). The activation of the group identity and its saliency depend on characteristics of situations that shape "the extent to which the categorization makes sense in relation to the individual's cognitive frame of reference (e.g., beliefs, expectations, stereotypes)" (van Knippenberg et al. 2004, p. 1014). We believe more can be done to understand the way in which pre-organizational and work context shapes in-group and out-group categorizations. Additionally, rather than focusing on whether a categorization has taken place, more work can be done to capture how these processes occur in natural settings as well as the potential implications for choices made after a categorization takes place.

(Role) Identity Theory

According to identity theory, individuals adopt identities based on roles. Individuals are likely to assume roles they believe are supported by key referents and that are consistent with personal values and beliefs (McCall George and Simmons 1978; Stets and Serpe 2013; Stryker 2002). Unlike social identity theory, which highlights uniformity of perceptions and actions among in-group members, identity theory claims that role identities are malleable in the interactional contexts and can vary among in-group members. Although social identity theory asserts that a person adopts a group identity in order to feel valued and worthy, identity theory highlights a person's motives for feeling competent and effective by accomplishing a role (Stets and Burke 2000). Both share a viewpoint that identities are not fixed but are fluid depending on the context in which individuals operate. However, identity theory adds nuance by focusing on "social structural arrangements and the link between persons" (Stets and Burke 2000, p. 231).

To further our understanding of the role of identity in the process of active representation, we argue scholars must think critically about several aspects of identity. First, what do we mean when we employ the concept of identity? Second, scholars should wrestle with the elasticity of identity (Kreiner, Hollensbe, Sheep, Smith, and Kataria 2015). Identity is a dynamic concept and humans emphasize or experience their identity in an assortment of ways. Additionally, the factors that shape this can emanate from the person or the context in which they find themselves. Third, what is the importance of one's work identities (Christiansen, 1999)? Fourth, in what ways does a managerial or leadership identity (or even a public service identity) shape processes of representation (Grøn, Bro, and Andersen 2020)? Bringing these ideas together, Grøn and colleagues suggest that both personal and organizational factors can shape the identity of managers in the public sector. We would like to raise two points here: 1) many of the factors that shape managerial identities ostensibly should influence employee identities too and 2) although the idea that both personal and organizational factors shape identity is not surprising, it does raise important questions for certain assumptions about the strength of demographic characteristics in shaping some of the "downstream" processes in the logic of representative bureaucracy. Finally, how do the relevance and salience of identities influence the steps in the causal chain of representative bureaucracy?

Application of These Perspectives to Representative Bureaucracy

Social identity theory assumes uniformity of cognition, attitude, and behavior among members of the same group identity. This aligns with the logic of representative bureaucracy, which assumes that the subsequent links among demographic characteristics, pre-organizational socialization experiences, values, and behaviors apply similarly to all members of the same demographic group. From a social identity theory perspective, the more bureaucrats commit to the group-based identity, the more favorably they treat in-group clients over out-group clients to enhance their and in-group clients' self-esteem and reinforce the expectations of group membership. In extreme cases, particularly in the face of identity threats from out-groups, bureaucrats may exhibit prejudice or negative stereotypes toward out-group clients.

However, we argue that social identity theory does not consider interactions between a focal individual and others in the environment. Moreover, given the place of racial socialization prior to organizational entry, social identity theory rules out the possibility that racial socialization works in ways that encourage bureaucrats to avoid their group-based identities (e.g., race-related stress and assimilation to dominant norms). Social identity theory leads to the question of how external situations activate a group-based identity that entails shared values and expectations for behaviors; this question has been addressed in the literature (e.g., Keiser et al. 2002; Meier and Morton 2015).

Identity theory takes an idiosyncratic approach because individuals may differ in which roles they assume in their interactions with others. According to this perspective, the logic of representative bureaucracy may not apply as expected. For example, as individuals develop and negotiate the meaning of assuming roles in various interactional situations, sharing demographic characteristics with the client is not sufficient for taking for granted that the bureaucrat would advocate for that client. Even if individuals have undergone pre-organizational socialization that stresses certain values and attitudes, bureaucrats can develop their own self-meaning and can assume that roles vary in different interactional contexts. In addition, in the context of racial and ethnic representation, other personal and organizational factors may encourage the bureaucrat to take the minority representative role (Selden, 1997).

Additionally, identity theory emphasizes individual level psychological factors (e.g., commitment and motivation) that condition an individual's behavior in an interactional context. According to Herbert (1974), minority administrators face multiple role expectations that may conflict with one another. Therefore, among several role expectations partly generated by race and other distinct personal experiences, individuals assume the roles to which they are committed because of their ties with others in their social networks and the degree of support they receive based upon that identity. This can be expanded to account for other individual-level and psychological factors that may condition the translation of passive representation into active representation [e.g., see hypotheses proposed by Meier (2019)].

Despite the differences discussed above, it is difficult to separate group identity from role identity—they are indeed related. Research shows that the race of a public servant is a strong indicator for whether they will take on a minority representative role (Selden 1997). However, to complicate matters, group and role identities are often played out simultaneously, sometimes in conjunction and sometimes not. For example, a bureaucrat's race can imply serving as an advocate for co-racial clients, but it does not necessarily imply the bureaucrat will assume this role. In other words, the bureaucrat's race has implications for, *but does not define*, the types of roles that the bureaucrat may assume, and the interactions associated with such roles (Hogg, Terry, and White 1995; Thoits 1991).

An acknowledgement that identity is multifaceted presents opportunities and challenges for representative bureaucracy research. Regarding social identity, the problem of identity salience encourages us to understand how cognition influences our understanding of identity and how affect shapes our perceptions of our and others' identities. For example, a bureaucrat may *learn* or *feel* different kinds of social identity threats arisen inside (e.g., performance appraisal) and outside (e.g., a political and social movement) her organization, all of which may impact her resource allocation decision making. An interesting question to consider is under which conditions group-based or role-based identities become more salient and play a larger role in shaping the process of active representation. Additionally, the multiple roles a bureaucrat can play open the door to exploring which mental processing systems shape role acceptance as well as the ways in which that role will ultimately influence downstream decision making.

BEHAVIORAL FOUNDATIONS OF REPRESENTATIVE BUREAUCRACY: THE DESERVINGNESS HEURISTIC

For some time, political scientists have debated the factors that shape the decision to allocate public goods to individuals or groups. Among different perspectives, one group of scholars suggests that deservingness is an evolutionarily learned heuristic that helps human beings regulate exchanges of small-scale help (Hansen 2018; Petersen 2012, 2015; Petersen, Slothuus, Stubager, and Togeby 2011; Petersen, Sznycer, Cosmides, and Tooby 2012). According to this perspective, "Modern welfare politics should arouse our help-giving psychology, as it basically revolves around whether benefits should be transferred to needy individuals" (Petersen 2012, p. 4). Empirical evidence on the evolutionary deservingness heuristic suggests that 1) individuals (e.g., bureaucrats) may categorize other individuals (e.g., clients) according to available effort cues—i.e., whether they are deserving (i.e., a "reciprocator") or not (i.e., a "cheater")—but 2) individuals are more attuned to differences of deservingness than they are to the scale of the social benefit (Petersen 2012). This suggests that bureaucrats may pay more attention to who deserves than what they deserve. In this view, the question of deservingness boils down to a yes/no decision.

In addition to understanding discretion as a yes/no decision, a recent study also advanced the idea that bureaucrats respond to different types of deservingness (see Jilke and Tummers 2018 for a description of these types). From this study, two types of deservingness appear to warrant further investigation vis-à-vis representative bureaucracy. In their study, teachers signaled they were more likely to provide time and resources to clients they assumed had "needed deservingness" and so-called "earned deservingness" (exhibited through high levels of effort). They also investigated whether the race or gender of the client influenced these decisions, finding evidence for race but not for gender. Although they found further evidence that in-group status can influence some allocations, their study did not set out to assess the relationship between deservingness and identity. Other recent evidence suggests that policymakers use their perceptions of client deservingness to inform their view of how much administrative burden is appropriate for the client to face (Baekgaard, Moynihan, and Thomsen 2020). Initial evidence suggests that the deservingness heuristic may shape active representation.

Application of the Perspective to Representative Bureaucracy

The deservingness heuristic offers one potential explanation of the dissonant findings where bureaucrats act in the interests of clients with whom they do not share demographic characteristics (Selden 1997; Sowa and Selden 2003; Zwicky and Kübler 2019). Moreover, we argue that the deservingness heuristic serves as a potential affective mechanism when bureaucrats engage in active representation. Because they involve a decision to transfer goods to an individual, the types of allocations which a bureaucrat considers will often fit the parameters of the deservingness heuristic. Thus, when a potential client petitions the state through the bureaucrat, we expect this to activate a deservingness cue on the part of the bureaucrat. The response to this cue—e.g., "this client is 'deserving' of public resources" or not—will influence the allocation choice. This expectation, if accurate, reflects Meier's hypothesis that *"bureaucrats are more likely to act for clients who are in the greatest need"* (Meier 2019, p. 41).

The Jilke and Tummers (2018) study raises two important challenges for the study of representative bureaucracy, both of which reinforce the need to consider its behavioral foundations. First, their study demonstrates that the foundational elements of representative bureaucracy—e.g., affect and System 1 processing—play an important role in helping us understand bureaucratic decision making in situations relevant to active representation. Their study also helps us to see the limitations in social identity theory as the foundation of active representation in that it provides too strong an assumption about the implications of the social identities of a bureaucrat and client. We believe that this evidence supports our argument to critically examine the elemental aspects of active representation.

Earlier, we argued that previous research did not adequately indicate *how* identity would shape values, and eventually decisions. We discussed the logic of the theory of representative bureaucracy in which identity shapes decisions through pre-organizational socialization and values, respectively. Jilke and Tummers (2018) take a different approach, arguing that identity is itself a value that shapes decisions. They describe deservingness as a cue which helps individuals (bureaucrats) place other individuals (clients) into different social categories. Explicitly, they describe their categorization of deservingness as an identity—it is a social categorization—but, implicitly, their description of deservingness reads more like a value. We believe that this is important in that it reinforces the challenge in understanding what a "value" is in representative bureaucracy research. It is somewhat ironic that despite not writing directly about representative bureaucracy that they may have provided the closest attempt to connect identity and the decisions of bureaucrats.

Additionally, their study calls attention to the role of both identity *and* deservingness in shaping allocation decisions by bureaucrats. Elsewhere, we argued that identity and values are not necessarily linked. One implication from the Jilke and Tummers study is that, under certain conditions, identity—as it is commonly construed to mean *social* identity—may play little to no role in shaping bureaucratic decisions. Clearly, there is evidence that identity matters in some way. But how? When? Why? The research on deservingness suggests that we should be mindful not to put too much emphasis on descriptive identities.

In summary, recent studies demonstrate that perceived deservingness is a heuristic that influences how individuals allocate social goods. Further work is needed to 1) clarify exactly how deservingness shapes actual allocation decisions, 2) understand the relationship between deservingness and identity, and 3) explore what factors (e.g., public service motivation, bureaucratic regulations, and organizational role) moderate the role of deservingness or identity.

CONCLUSION

> "*There is no need, at this late date, to justify the study of organization and administration in terms of the decision-making process, for decision-making concepts and language have become highly popular in writing about administration*." (Simon, 1965, p. 31)

Our assessment of the theory of representative bureaucracy is that there exists a disconnect between what the theory purports to show (i.e., the logic of representative bureaucracy) and what it can show. We believe this is an important constraint to refine and advance the theory of representative bureaucracy. We argue that a plausible way to advance scholarship in this area is to critically engage the role of psychology in shaping the processes that scholars believe are essential to active representation.

We engage this problem in several ways. First, we describe two well-known perspectives of decision making: the tripartite classification system and dual-process theories. We also discuss social identity theory and (role) identity theory, showing how each is relevant to analyze the process of active representation. Finally, we discuss the deservingness heuristic and suggest that it raises important questions for the study of representative bureaucracy.

For each section, we include a discussion of the implications of applying each perspective to the study of representative bureaucracy. One will notice that we do not include any formal hypotheses in this paper. As others have noted, the theory of representative bureaucracy must acknowledge and should account for the complexity of the subject (Meier and Morton 2015). Our emphasis on psychology seems to further emphasize how many moving parts are pertinent to the subject. Several variables—the interplay of mental processes, the complexities of identity, types of deservingness, and contextual factors—could influence active representation. On top of this, scholars will need to wrestle with what they mean by "value" as well as what it means to represent. Thus, although there are a multitude of ways in which scholars can utilize the processes we highlight, we have come to believe the aim and scope of this paper is not to narrow down these complexities to a few specific hypotheses but instead to call attention to the broad array of possibilities open to scholars to refine and expand our understanding of representative bureaucracy.

We hope this paper will encourage scholars of representative bureaucracy to assess the assumptions they bring to their research on representative bureaucracy more critically. Ideally, scholars will find a way to incorporate this perspective into their research. We additionally challenge them to connect and disentangle the different elements we discuss here. In the end, we believe a concerted effort to engage the behavioral foundations of representative bureaucracy can help us see the subject in a new light.

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