

THESIS

**A Lived Experience Theory of Schism (LETS):
 Exploring the Complex Social Dynamics Powering
 Factionalised Conflict in Nonprofit Organisations**

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BSc Hons, MBA

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I dedicate this work to my amazing mum, Elizabeth Sugars,

Who founded the Family School

Because schooling should simply be about children and learning and joy

And because she was not afraid of a challenge.

Thesis Declaration

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The content in this thesis was developed by the Candidate with advice from their supervisory panel.

The following individuals contributed to the thesis.

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Megan Paull	10	x	x	x	x
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Contribution indicates the total involvement the Candidate has had in the creation of the thesis. Placing an 'X' in the remaining boxes indicates what aspect(s) of the thesis each individual engaged in.

By signing this document, the Candidate and Principal Supervisor acknowledge that the above information is accurate and has been agreed to by all other contributors.

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Abstract

Schism is a widespread phenomenon of social groups which has persisted over centuries. An intense form of factionalised conflict, schism can be distressing for people to experience and challenging for groups to navigate. Schism research has roots in anthropology, organisation studies, and social psychology, and has been studied in societies, religions, social movements, political parties, nonprofit organisations, and other contexts. Despite broad and enduring relevance to social organising, schism research is surprisingly scant. Across disciplines and contexts, findings are disjointed and contradictory. No widely accepted definition or theory of schism was found in the literature.

The aim of the current research was to gain insight into the social dynamics powering the incidence, progression, and lived experience of schism. The goal was to increase human agency and control in schism based on emerging theoretical knowledge, and thereby improve experiences and outcomes for people and organisations.

A qualitative study of schism in nonprofit organisations in Western Australia was undertaken using an exploratory qualitative research design and a lived experience lens. Participant-centred interviews were conducted, typically of 1 hour, with 41 people who described schisms in 24 organisations. Sampling was initially by convenience then purposive snowball sampling, enabling a range of organisations, roles, and experiences to be represented. Interviews were transcribed to form a rich primary data set. Systematic coding and thematic analysis complemented immersion in individual stories. Data collection, data analysis, and theory development were iterative and interdependent. Emerging themes forced problematisation of prior knowledge. The ongoing process of theory construction employed both inductive and abductive reasoning.

A novel conceptualisation of schism emerged from this research project, representing schism as a complex social construction in an open system rather than a linear process in a bounded system, and privileging the human experience over the organisation as the entity of concern. A new

definition of schism is proposed which provides a foundation for the lived experience theory of schism (LETS) presented in this thesis. Together, the definition and theory contribute to knowledge of schism in organisations and other social systems, and provide a foundation for future schism research. Findings from this project have implications for nonprofit sector policy and practice, especially in group leadership and governance.

Keywords: complexity, conflict, contest, factionalisation, group leadership capacity, human needs, LETS, lived experience, nonprofit, power, schism, transformation, worldview impingement

Table of Contents

Dedication	2
Thesis Declaration.....	3
Attribution Statement.....	4
Acknowledgments	5
Abstract.....	6
Table of Contents.....	8
Table of Figures	12
Table of Tables.....	12
Chapter 1 Introduction.....	13
<i>Schism is a Real-Life Problem</i>	<i>13</i>
<i>Schism Definition in Use</i>	<i>15</i>
<i>Schism Literature Overview</i>	<i>15</i>
<i>Research Problem.....</i>	<i>17</i>
<i>Research Questions</i>	<i>18</i>
<i>Research Design</i>	<i>18</i>
<i>Findings and Discussion.....</i>	<i>20</i>
Proposed New Definition.....	21
Lived Experience Theory of Schism (LETS)	22
Practice and Policy Implications	23
<i>Outline of Thesis by Chapter.....</i>	<i>23</i>
<i>Presentation of Data and Discussion.....</i>	<i>25</i>
Chapter 2 Literature Review	26
<i>Schism Literature.....</i>	<i>27</i>
Fields of Study.....	27
Schism as a Process of Conflict, Factionalisation, and Mass Exit	28
Factors Associated with Schism Incidence, and Outcomes of Schism	30
Theoretical Perspectives on Schism.....	34
Qualitative Schism Research.....	44
Quantitative Schism Research	47
<i>Identity</i>	<i>48</i>
<i>Power</i>	<i>52</i>
<i>Sensemaking</i>	<i>54</i>

<i>Limitations and Problematisation of Schism Literature</i>	57
Chapter 3 Research Design	61
<i>An Emerging Research Project</i>	61
<i>Research Questions</i>	63
<i>Role of the Researcher</i>	65
<i>Philosophical Foundation</i>	65
<i>Ethical Considerations</i>	68
<i>Robustness of Research Design</i>	71
<i>Rationale for Nonprofit Context</i>	75
<i>Sampling</i>	77
<i>Interviews</i>	82
<i>Data Analysis</i>	84
<i>Theory Development</i>	89
<i>Summary of Research Design</i>	91
Chapter 4 Proposed New Definition of Schism	92
<i>What is Schism?</i>	92
<i>Five Uses of the Term Schism</i>	93
<i>Theories and Definitions of Schism in Literature</i>	96
<i>Inflection Point</i>	98
<i>Proposed New Definition of Schism</i>	100
<i>Four Definitional Elements of Schism</i>	101
<i>Worldview Impingement</i>	103
<i>Transformation</i>	106
<i>Factionalisation</i>	111
<i>Contest</i>	116
<i>Case for New Definition Over Existing Definitions</i>	121
<i>Proposed New Definition Identifies and Distinguishes Schism</i>	128
<i>Summary of Proposed New Definition of Schism</i>	131
Chapter 5 Performative Elements	133
<i>Human Needs</i>	133
<i>Identity Threat</i>	136
<i>Personal–Embodiment</i>	141
<i>Crisis</i>	145
<i>Liminality</i>	151
<i>Human Needs in Schism</i>	155
<i>Balance of Power</i>	155
<i>Narrative</i>	156

Organisation.....	160
Righteousness	166
Legitimation	172
Contesting the Balance of Power in Schism.....	179
<i>Group Leadership Capacity</i>	180
Evolution of Terms and Concepts	181
People	186
Network	192
Structure	200
Group Leadership Capacity and Schism	207
<i>Summary of Performative Elements</i>	209
Chapter 6 Lived Experience Theory of Schism (LETS).....	212
<i>Lived Experience Theory of Schism (LETS)</i>	212
Foundational Principles of LETS	214
Elements of LETS.....	215
<i>LETS Applied to Analysing Neville’s Story</i>	220
<i>LETS Advances Current Theory</i>	225
LETS is Conceptually Precise	226
Review of Advantages of Proposed New Definition	226
LETS Foundational Principles: Complexity, Boundedness, and Normativity	230
<i>LETS in Practice</i>	235
Expand Agency: Multiple Levers for Intervention	237
Improve Control: Allow for Prevailing Conditions	245
When the “Good Guys” Lose	251
<i>Summary of Lived Experience Theory of Schism</i>	256
Chapter 7 Conclusion	257
<i>Research Project Overview</i>	257
Research Questions are Embedded in Findings.....	259
<i>Contributions to Knowledge</i>	259
Contributions to Schism Theory.....	259
Contributions to Practice and Policy.....	262
<i>Generalisability and Limitations of Research</i>	266
<i>Future Research</i>	269
<i>Final Reflection</i>	273
Reference List	274
Table of Glossary and Appendices	294

Glossary.....	295
Appendix A Human Research Ethics and Participant Recruitment.....	297
Appendix B Participant Pseudonyms and Organisations	305
Appendix C Coding Schema	307
Appendix D Interim Model of Schism.....	310

Table of Figures

Figure 1 Research Questions in Context of Project	64
Figure 2 Generating Themes from Data	87
Figure 3 Themes to Theory	88
Figure 4 Proposed New Definition of Schism.	100
Figure 5 Existing Research Focuses on Causes and Outcomes	134
Figure 6 Human Needs Central to Individual and System Response	134
Figure 7 Lived Experience Theory of Schism (LETS)	213

Table of Tables

Table 1 Six Core Theoretical Models in Schism Literature	35
Table 2 Insights from Qualitative Schism Research	44
Table 3 Participants	80
Table 4 Organisations	80
Table 5 Clusters in Participant Interviews	81
Table 6 Code Combination for Use of Embodiment Metaphors for Sensemaking	85
Table 7 Five Uses of the Term Schism	95
Table 8 Comparison of Six Core Schism Conceptualisations in Literature	97
Table 9 Outline of Definitional Elements of Schism	102
Table 10 Six Core Literature Conceptualisations Mapped to Proposed New Definition	127
Table 11 Proposed New Definition Distinguishes Schism from Other Social Processes	129
Table 12 Sub-Elements of Group Leadership Capacity Relative to Existing Literature Concepts	185
Table 13 LETS Applied to Analysing Neville's Schism Story	221

Chapter 1 Introduction

Schism is a Real-Life Problem

Schism is a form of factionalised conflict common in social systems, and a normal part of group development (Balsler, 1997; Bateson, 1935; Dyck & Starke, 1999; Hart & Van Vugt, 2006; Kreiner et al., 2015; Sani, 2008; Turner, 1980). For people, engaging in schism has potential costs. The lived experience of schism can be intense, hostile, and traumatic (Briody, 2016; Hobbs, 2011; Kalifon, 1991; Minahan & Inglis, 2005). Personal losses can be significant including well-being, group membership, employment, valued identities, life activities, and relationships. For organisations, schism is associated with financial and reputational damage (Devers et al., 2009; Paetzold et al., 2008), perceived failure of conflict resolution processes (Gamson, 1975; Miller, 1983), operational and emotional upheaval (e.g., Minahan & Inglis, 2005), injury to working relationships (e.g., Kalifon, 1991), loss of group unity (Sani, 2008), loss of members (Balsler, 1997; Dyck & Starke, 1999), and existential threat (Fernandez, 2008). Schism is, however, a mechanism for transformation and renewal (Gorup & Podjed, 2015; Kreiner et al., 2015). Despite high stakes and ample opportunity to observe and practise, little is understood about the inevitability or otherwise of schism, how actors navigate schism more or less successfully, or how and from what perspective success might be judged.

Research tends to be directed at identifying causes or triggers of schism and outcomes for organisations, rather than how people can have agency and control over the incidence, progression, and lived experience of schism. Anecdotally, avoiding schism incidence is seen as the surest way to avoid potential loss since once schism begins it easily escalates (Bateson, 1935; Dyck & Starke, 1999) despite genuine efforts at resolution (Briody, 2016). An overfocus on schism incidence and an overreliance on avoidance approaches, however, can preclude developing knowledge and strategies for when schism inevitably does occur. A more complete and productive approach may consider

what a broader set of successful outcomes might look like, given the current state of the social system, and how to work towards this. Schisms that have already begun are of particular interest.

Avoidance of schism may not always be possible or desirable. Even prior experience of schism is no guarantee that people will recognise signs of onset or be able to avert schism.

I don't think anything really shocked me, but it did sadden me... the intensity of some of those feelings... I have seen a lot of it before. The fallout, and the hurt... You make this commitment saying, "We won't do that again"... and it just doesn't.... seem to work.... Is there a pattern to those... things? Or is it just because of human nature, it's always a little bit different and it catches you off guard every time? (Anne)

The impetus for this research was to investigate whether personal lived experiences of schism had been shared by others. If so, whether theory could be developed which had the potential to empower people to shape experiences of schism to reduce loss and pain.

A qualitative, exploratory research design was considered appropriate based on the underdeveloped state of the literature, the phenomenon being studied, and the research goals. An interpretivist approach valued participants as knowledgeable and intuitive actors who understand and shape their environment. A lived experience lens was applied within a social constructivist paradigm, recognising plurality and conflict. Data was collected through semi-structured, discovery interviews, and analysed through immersion in participant narratives and thematic coding. Theory development was an iterative process of inductive and abductive reasoning. The dominant view of schism as a linear group process ending in mass exit was problematised, and schism was reconceptualised as a complex social construction in an open system.

A new definition of schism is proposed, which can be used across multiple contexts, and distinguishes schism from other social phenomena. A lived experience theory of schism (LETS) builds on the definition, advancing theoretical understanding of social dynamics in schism. The proposed new definition and theory represent an original conceptualisation of schism and advance schism theory. The definition and theory integrate and reconcile schism literature from different disciplines,

and provide a theoretical foundation for future research. They invite discussion on group leadership and power in nonprofit organisations and suggest practical ways to improve human agency and control during episodes of schism.

This introductory chapter begins by defining schism as it emerged from this work. Research questions are then framed by outlining concepts and limitations in schism literature. Research design, research findings, and contribution to theory, practice, and policy are briefly described. Lastly, the structure of the thesis by chapter is outlined and some notes on data presentation are made.

Schism Definition in Use

At the beginning of the research project, schism was understood as an extreme version of group conflict involving factionalisation, conflict, and member exit. This conceptualisation originated in personal experience and aligned with early literature investigation. After preliminary analysis of data, and close comparison with other literature definitions and case studies, neither this understanding nor any single or compiled definition from the literature seemed entirely fitting.

Schism was deliberately kept undefined and ambiguous until the late stages of the research process. The definition in use in this thesis emerged from the research and is the first of two main findings; the proposed definition is substantiated in Chapter 4. Schism is defined here as a complex social process identified by the concurrence of four interacting elements: worldview impingement, transformation, factionalisation, and contest.

Schism Literature Overview

Schism research is scattered across decades and academic fields including anthropology (Bateson, 1935; Turner, 1980), social psychology (Hart & Van Vugt, 2006; Sani, 2008), organisation studies (Dyck & Starke, 1999), religious studies (e.g., Kreiner et al., 2015; Potz, 2016), political studies (e.g., Desan, 2019; Sani & Pugliese, 2008), and social movement studies (Balsler, 1997; Gamson, 1975; Kretschmer, 2017; Zald & Ash, 1966). Theoretical underpinnings, research goals, and findings

are disconnected and contradictory, and neither a widely accepted definition nor a generalisable theory was found in the literature search.

A common conceptualisation of schism is as a linear process in a bounded social system involving conflict, factionalisation, and mass exit (Balser, 1997; Dyck & Starke, 1999; Hart & Van Vugt, 2006). In the past, attention has been given to the process of schism, its steps and stages, and tendency for escalation (Bateson, 1935; Dyck & Starke, 1999; Turner, 1980). There has been interest in context and events associated with schism, but few strong correlations have been established (Asal et al., 2012; Balser, 1997; Gamson, 1975; Sani, 2008). Case studies have illustrated any number of circumstances that may cause or trigger schism (e.g., Balser & Carmin, 2009; Gorup & Podjed, 2015; Harris, 2015; Potz, 2016; Sani & Reicher, 2000) but research does not show why these factors only sometimes lead to schism. Some authors have framed schism as a transformative social process, challenging the assumption of schism as negative (Gorup & Podjed, 2015; Kreiner et al., 2015; Shriver & Messer, 2009). More recently, Desan (2019) characterised schism as a struggle through which factional divisions are made meaningful, a promising move towards complexity and constructivism.

The lack of a robust theoretical framework to date appears to have inhibited schism research. Some few more recent publications in the social psychology field have been based on the social psychological model of schism (Kreiner et al., 2015; Sani, 2008; Wagoner et al., 2019; Wagoner & Hogg, 2016). This model focuses on identity-based psychological processes of individuals developing schismatic intent, a relatively narrow lens. Turner's (1980) social drama model has also provided a reference point for some organisational researchers, and has recently been applied to studies of liminality in change management (Briody, 2016; McCabe & Briody, 2016; Walker, 2019; Winkler & Kristensen, 2021). A theory of schism generalisable to other purposes and other fields of research is needed, notably in nonprofit leadership and management. Little progress has been made unfortunately, in the twenty-five years since Balser (1997) sketched an outline of what should be considered in a theory of schism.

Research Problem

The underlying goal of this research was to empower people, especially in nonprofit organisations, to shape the incidence, progression, and lived experience of schism. These three dimensions of schism have been deliberately separated because the *incidence* of schism—whether a schism is likely to occur or the fact of schism occurrence—has tended to dominate research and practice. A focus on preventing incidence of schism may have led to a paucity of research on schism management: exploring how practitioners may achieve desired outcomes once schism is fully engaged. The dimension of schism *progression* was therefore considered—what happens and how the schism progresses—including how schism is managed by the group, turning points, escalations and de-escalations, and multiple outcomes. A third dimension considered was the *lived experience*—what the experience of schism was like for people—the degree of trust and reciprocity in relationships; the degree of engagement, inflammation, and distress; and losses incurred.

Two opportunities to contribute to schism research, which were directly relevant to the underlying research goal, were identified from a review of the literature. First, past research has focused on the organisation as the entity of concern, obscuring people's active role in the construction of schism and the inherent significance of their lived experience. A participant-centred research design and lived experience lens offered the opportunity to gain new insight. Second, existing definitions and models are context specific and contradictory, and no shared language, widely accepted definition, or general theory was found. Theory needed to be built, not built upon.

The research problem was emerging, to develop a theory of schism generalisable across contexts and disciplines, which reconciled rather than discarded existing research, and was based on a clear and coherent set of assumptions. The theory would be grounded in data and recognise the human and social nature of conflict and organisation. Finally, to meet the research goal, new theoretical knowledge would empower practitioners to expand agency and improve control in schism.

Research Questions

Given the objective of developing theory based on lived experience, this research began with an overarching interpretivist question:

OQ How do people understand and express their experience of schism?

Four additional questions emerged during engagement with the literature, data collection, and data analysis, which were fundamental to the research problem and goal:

Q1 What is a schism?

Q2 How do people feel, behave, make sense, and respond in schism?

Q3 What contexts, social dynamics, and characteristics (elements) do schisms have in common?

Q4 What insights from this research can help people recognise and have agency in schism?

Research Design

Not a quest for scientific truth, but a quest for meaning. (Rhodes & Brown, 2005, p. 167)

This research was undertaken from an interpretivist standpoint. Each participant was the author of their own story, and insight was sought through immersion in their reality for a time. Schism was considered a universal and unique social phenomenon, distinct from other social phenomena, and recognisable by the people experiencing it. Foundational to choosing a lived experience approach was the conviction that people—not organisations—bear the brunt of distress and loss during schism, and people—not processes—have the creativity and motivation to affect the incidence, progression, and lived experience of schism. Further, that insight into the social dynamics of schism would empower human agency and control in a way that identifying associations between discrete events or contextual factors and schism incidence has not.

It would be naïve to presume passive observation, without filter, judgment, or prior understanding of the world. Indeed, an interview is a discourse for the purpose of shared meaning

making, and involves a degree of relationship, mutual trust, and understanding. Thus, this thesis and any new knowledge therein is a social construction. Robusticity has been enhanced through clarity of goals, assumptions, methods, and logic of concept development (Eisenhardt & Graebner, 2007). Rigour has been achieved, not through objectivity, but transparency about what the researcher believes to be true, and why they believe it.

An exploratory research design was considered appropriate, considering the disjointed and under-theorised state of the literature. Theory as an end point, rather than a framework, is characteristic of an interpretivist approach. The phenomenon of schism was examined through the lens of people's lived experiences in nonprofit organisations. Interviews generated stories, a rich, thick form of data (Kilmann & Mitroff, 1976). A lived experience lens supported assumptions of pluralism and subjectivity appropriate to the conflict setting (Rhodes & Brown, 2005).

Social constructivism provided a philosophical foundation for the research process, and for understanding the phenomenon of schism. In a social constructivist worldview, reality is formed through powerful social processes of reification. It is a "paradox that man is capable of producing a world that he then experiences as something other than a human product" (Berger & Luckmann, 1966, p. 57). Constructivism privileges understanding, allows for complexity, plurality, and conflict, and recognises social and historical context. It was a suitable frame for asking why seemingly ordered social systems are regularly disrupted by schism, and why people find the lived experience of such disruptions so challenging.

Social constructivism was consonant with other concepts drawn upon in this thesis including a Foucauldian view of power (Clegg et al., 2006; Fleming & Spicer, 2014; Foucault, 1977; Haugaard, 2020; McHoul & Grace, 1993), the influence of language in the construction of organisation (Cornelissen & Kafouros, 2008a; Fairhurst & Putnam, 2004; Morgan, 1997), identity construction (Albert & Whetten, 1985; Ashforth & Mael, 1989; Petriglieri, 2011; Tajfel & Turner, 1979), sensemaking (Cunliffe & Coupland, 2012; Sandberg & Tsoukas, 2015; Weick et al., 2005), and narrative (Polkinghorne, 1995; Rhodes & Brown, 2005; Sandelowski, 1991).

Data was collected and analysed iteratively, as new themes and questions emerged, and theory was generated using inductive and abductive analysis (Creswell, 2013; Ezzy, 2002). Interviews were conducted in Western Australia with 41 employees, volunteers, and members of nonprofit organisations, and professionals with expertise in group conflict resolution. An initial convenience sample was followed by purposive snowball sampling (Eisenhardt & Ott, 2018). Semi-structured interviews used a discovery interview approach (Bridges et al., 2008). Interview questions evolved as responses indicated saturation and new questions emerged. The resulting rich data set was comprised of participant narratives and responses to questions.

Data analysis involved switching between immersion in narratives, coding and thematic analysis (Ryan & Bernard, 2003), testing mental models, and generating theory through induction and abduction (Ezzy, 2002). A particular challenge in the process of abstracting to theory was retaining the sense of participant stories as personal, raw, and complicated. A turning point was in problematising the dominant linear process, mass-exit definition of schism, and beginning theory building anew with fewer assumptions and more questions (Alvesson & Sandberg, 2011). A second shift occurred through developing confidence in situating power as central to understanding organisations, leadership, and schism (Clegg et al., 2006; Fleming & Spicer, 2014; Haugaard, 2020).

Findings and Discussion

Meeting the participants, and immersion in their stories, supported the premise that people are profoundly affected by schism. Participant lived experiences involved all aspects of self: cognition, emotion, physicality, relationships, identity, and sense of justice. Hearing stories of unwavering resolve, ethical dilemmas, personal heartache, and plain hard work supported the conviction that people can, in turn, have a profound effect on the collective lived experience of schism. Insights into the human experience of schism were inherently valuable, but were also the key to understanding schism in the abstract, as a social process and phenomenon.

A proposed new definition and lived experience theory of schism are the principal contributions of this research. They represent schism as a social phenomenon defined by complex human dynamics, a novel perspective that is ontologically distinct from linear group process conceptualisations, which dominate existing literature.

Proposed New Definition

The research question “What is a schism?” emerged as pivotal to the project. The proposed new definition emerged from data, and is elaborated in Chapter 4. The new definition captures the nature of schism as a phenomenon, process, and state of a social system at a point in time. Familiar concepts from schism literature, including factionalisation, conflict, and identity threat are refined and incorporated into the proposed definition. Schism is defined as a complex social process identified by the concurrence of four interacting elements: worldview impingement, transformation, factionalisation, and contest.

The proposed definition has advantages for identifying and explaining schism compared to linear, mass-exit models. First, complexity allows for elements to develop and manifest in different sequences, concurrently, and iteratively, which better matches data and resolves inconsistencies between literature models. Second, the new definition does not impose boundedness on the social system. Defining a boundary overlays a social system attribute of “wholeness,” which implies schism is a fracturing of the whole, and this presupposes normativity. Organisational boundaries are more accurately represented as permeable, variable, contested, and socially constructed. Third, mass-exit definitions do not account for the variability of exit costs and options nor unity within the exiting faction. The new definition, more appropriately, includes and excludes instances of schism based on social dynamics rather than formal separation. Fourth, using the new definition, schism can be defined in the present moment since there is no requirement to wait until after a schism-ending marker, which is advantageous for both research and practice. Finally, the new definition is not based on discipline-specific theory or terminology and is readily used in different contexts.

Lived Experience Theory of Schism (LETS)

Ultimately, this research led to the development of a theory of schism called LETS, derived as an acronym of Lived Experience Theory of Schism, which is presented in Chapter 6. LETS builds on the new definition by incorporating three emerging elements: human needs, balance of power, and group leadership capacity. These elements were observed to affect schism dynamics in the three dimensions of incidence, progression, and lived experience.

Schism construction was shown to be driven by people's responses to perceived threatened or unmet human needs like belonging, security, predictability, empowerment, and justice. So, while conditions in schism affected people's lived experiences, the reverse was also true.

A factional contest to shift the balance of power was also characteristic of schism, and had the effect of escalating and inflaming schism, and driving the development of other schism elements. Factions competed for the power to control decision making, as distinct from competing to influence decisions. While such power struggles were often perceived as dysfunctional, since energy seemed to be directed at gaining factional advantage in place of achievement of organisational goals, a response to contest for power was understandable when considered from the perspective of human needs. People perceived a high level of threat to themselves and their organisation, and responded with a long-term view of securing the future, and this meant *whatever it takes*.

Group leadership capacity emerged as an element of schism subject to human agency, and influential in schism incidence, progression, and lived experience. Every case of schism described by participants in the study featured a breakdown in the group's capacity to enact leadership. LETS advances theoretical knowledge of schism, and thereby provides the opportunity to expand agency and improve control in real-life schismatic conditions.

Practice and Policy Implications

Overall, this research offers an opportunity to engage with practitioners by presenting a fresh perspective on schism, which promotes the importance of the human experience and of social dynamics. LETS highlights enhanced opportunities for intervention, available to a range of actors with different goals, from activists promoting system transformation, to policy makers shaping governance and accountability structures, to group leaders maintaining robust organisations, introducing change, or responding in the midst of schism.

Leading a group in active schism is difficult. Advice on prevention or early intervention predominates but has limited value once schism is underway. A preference for avoidance strategies implies that averting schism is the “correct” approach. The persistent occurrence of schism in social systems over centuries, nonetheless, implies people are willing to instigate and participate in schism despite potentially negative experiences and outcomes. One enduring rationalisation of schism’s continuing existence is that human beings and organisations have conflict because they fail at *not* having conflict (Gamson, 1975; Pondy, 1967). But not having conflict is not always the primary driver of human behaviour. This work challenges expectations about governance, group leadership, conflict resolution, and schism, inviting a conversation about new approaches based on realistic assumptions of social dynamics in schism.

In short, this work provides a theoretical foundation for future schism research, and a realistic and practical new look at schism for policy makers and practitioners.

Outline of Thesis by Chapter

Chapter 1, Introduction, outlined the real-world relevance of schism as a research topic, the underdeveloped state of existing theory, the rationale for the research, the research design, and the principal research findings.

Chapter 2, Literature Review, focuses on schism literature, outlining limitations and contradictions, and framing the research problem. Necessarily brief introductions to literature on

social identity theory, power, and sensemaking are included for the purpose of contextualisation and researcher positioning.

Chapter 3, Research Design, discusses the utilisation of interpretivist and social constructivist worldviews, and a lived experience lens, as the philosophical foundation for the research. The choice of a nonprofit context is supported. Finally, data collection, data analysis, and theory development are discussed.

Chapter 4, Proposed New Definition of Schism, presents data and analysis supporting the first principal finding, a proposed new definition of schism in a social system. The process of developing the definition is described, each definitional element is explained, and alignment with or departure from concepts in the literature is justified. Arguments for the utility of the new definition are made.

Chapter 5, Performative Elements, presents data and analysis supporting the inclusion of human needs, balance of power, and group leadership capacity as elements in a theory of schism. These three elements emerged most strongly from data and were observed to have a performative effect on the incidence, progression, and lived experience of schism. Insights about the lived experience of schism highlighted by these elements are elaborated in depth in this extended chapter.

Chapter 6, Lived Experience Theory of Schism (LETS), presents the second principal finding of the research. LETS combines the definition, supported in Chapter 4, with each of the performative elements supported in Chapter 5. The theoretical robustness and practical utility of the proposed theory are explored.

Chapter 7, Conclusion, discusses the contribution of this research to schism theory and to nonprofit practice and policy. Generalisability and limitations of the research, and possibilities for future research, are outlined.

Presentation of Data and Discussion

Chapters 4, 5, and 6 combine the presentation of data with data analysis, theory development, and integration with literature. Multiple ways of presenting data were considered, and this emerged as the most efficient and effective. This presentation naturally follows concept development and enables a faithful portrayal of participant lived experiences.

Some terms or phrases have a specific meaning in the context of this thesis, including terms originating in literature and terms derived from data and during concept development. These terms have been italicised and defined in the relevant context. Terms important to the conceptual clarity of findings are collected in a Glossary (see p. 295). Citations from older literature which contain gendered pronouns are not individually noted, since gendered terms are not a central theme of this research, but the use of “man” for “human” has been noted.

In this thesis, participants, their organisations, and other protagonists in their stories have been deidentified with a pseudonym or label. Participant quotes are italicised, followed by a pseudonym in brackets; if relational information adds clarity or context to quotes this relationship is included. When a participant has stressed a word in speech, it is capitalised. Phrases prototypical of language used by participants are utilised in text, to add nuance and to ground the narrative in the lived experience viewpoint; these are italicised without attribution. Occasionally, participant quotes have been presented as block quotes, for extra emphasis, regardless of length. Otherwise, this thesis is formatted, written, and referenced in APA 7th edition style (American Psychological Association, 2020).

Attention has been drawn to the voices of participants to acknowledge them as narrators and active sensemakers. Their version of their story has almost always been presented as “reality.” On occasion, quotes may appear to be more a small story than a piece of evidence supporting a claim in the narrative. Cases seemed to have an “irreducible quality” (Flyvbjerg, 2006, p. 237). The minutiae of circumstance and language brings the characters to life and aids understanding. Real people and their experiences are the reason this research matters.

Chapter 2 Literature Review

The drama remains to the last simple and ineradicable, a fact of everyone's social experience and a significant node in the developmental cycle of all groups that aspire to continuance. The social drama remains humankind's thorny problem, its undying worm, its Achilles' heel—one can only use cliches for such an obvious and familiar pattern of sequentiality. At the same time it is our native way of manifesting ourselves to ourselves and of declaring where power and meaning lie and how they are distributed. (Turner, 1980, p. 158)

The focus of this review is theoretical representations of schism in the literature, to frame the proposed new definition and lived experience theory of schism presented in this thesis.

Exploration of other literatures was required to aid understanding about aspects of schism. These topics were sampled, rather than searched exhaustively. This review orients the reader to author positioning in the most salient of these topics: social identity theory, power, and sensemaking.

Scholars do not all use the term schism, nevertheless it is the only term that properly fits the phenomenon being studied. The decision to embrace the term schism was supported by its historical tenacity, its meaning in common use (Ferguson, 2017; Harris, 2018), the concept of schismogenesis (Bateson, 1935), and its use in social movement studies (Balsler, 1997), social drama (Turner, 1980), the social psychological model of schism (Sani, 2008), and the schismatic metaphor (Morgan, 1981).

A review of the literature began with research on schism in nonprofit organisations but the relative scarcity of schism literature, and the question of whether there is a meaningful distinction between schism in different contexts, led to expanding the scope of the search. Through identifying cross-referenced works, the search settled in organisation studies (nonprofit, and a selection from social movement, political, and religious), social psychology, and anthropology. Identifying schism research was subjective and emergent since a definition of schism was developed through the research process.

This chapter begins with an overview of schism literature, followed by more in-depth discussion of six core theoretical models of schism. Insights from qualitative and quantitative schism

literature are then outlined. Last is a brief review of social identity theory, author positioning on power, and an introduction to sensemaking.

Schism Literature

Despite agreement that “schisms constitute a widespread phenomenon” (Sani & Todman, 2002, p. 1647), schism research is sparse. It is spread over multiple disciplines, uses inconsistent terminology, has returned contradictory findings, and formal development of concepts is contextual.

Schism is especially associated with religion (e.g., Kreiner et al., 2015; Potz, 2016; Sani & Reicher, 2000), social and environmental movements (e.g., Balsler, 1997; Gamson, 1975; Shriver & Messer, 2009; Zald & Ash, 1966) and political parties (e.g., Asal et al., 2012; Sani & Pugliese, 2008), but has been studied in other social systems including profit and nonprofit organisations, national and ethnic groups, criminal cartels, sporting associations, professional associations, and hunter–gatherer groups (Hart & Van Vugt, 2006; Sani, 2005).

Fields of Study

This literature review focuses on schism research in organisation studies (Asal et al., 2012; Balsler, 1997; Dyck & Starke, 1999; Morgan, 2016), social psychology (Ashforth & Mael, 1989; Hart & Van Vugt, 2006; Sani, 2008; Tajfel & Turner, 1979), and anthropology (Bateson, 1935; Boulding, 1969; Firey, 1948; Lincoln, 2014; Turner, 1980). Each offers a unique perspective and comes with its own limitations, and there is value in comparing and integrating research from these three disciplines.

Within organisation studies, schism does not feature in leadership, management, crisis, or even conflict literature, rather it is more often found in social or political movement studies. The common presumption of the organisation as the entity of concern can subsume both systemic effects and the lived experience. When considering research findings, it can be necessary to disentangle schism from studies of organisational demise (Fernandez, 2008; Gamson, 1975; Hager, 1999), new group formation (Dyck & Starke, 1999), power struggles (Hobbs, 2011; Potz, 2016), or

leadership change (Balsler & Carmin, 2009), since the initial purpose of the research affects methodology and findings. It is also worthwhile noting when normative assumptions about organisations have been made, such as unity and order are expected and desirable, or conflict is an aberration (Pondy, 1967, 1992), and considering whether these assumptions have influenced findings.

“Within social psychology, schisms have been virtually ignored” (Sani & Reicher, 2000, p. 96). Sani (2005) speculated this could be partly because of a discipline bias towards uniformity, cohesion, and consensus at the expense of fragmentation, fluidity, and change, and partly because studying schism is practically and methodologically problematic. The social psychological model of schism (Sani, 2008) stresses individual psychological and cognitive processes over collective sensemaking and action. Hart and Van Vugt (2006) noted the focus in this discipline on individual exit from groups, and that conjunctive exit is more complex.

Anthropology considers schism in the context of societies. Bateson’s (1935) concept of schismogenesis and Turner’s (1980) social drama are the most cited of the models discussed later in this review, and have both been applied in some organisational and other contexts (Briody, 2016; Hobbs, 2011; McCabe & Briody, 2016; Morgan, 1981; Puustinen et al., 2012; Walker, 2019; Winkler & Kristensen, 2021). Anthropology provides an important counterpoint to organisation or group-focused research because exit is not as simple, and so representations differ in how they portray schism resolution.

Schism as a Process of Conflict, Factionalisation, and Mass Exit

Schism is most often represented as a process (Balsler, 1997; Dyck & Starke, 1999; Turner, 1980) but is also referred to as a phenomenon of social groups (Bateson, 1935; Sani, 2008; Turner, 1980). There are overlaps and inconsistencies between process models, including how schism is triggered, how and why it progresses, how it ends, and whether mass exit and new group formation are included. A detailed process model was developed by Dyck and Starke (1999), and other models

include processual elements (Bateson, 1935; Turner, 1980). Desan's (2019) case study, showing the construction of ideological difference to justify factionalisation and conflict, is an important counterpoint to the typical process view because it reverses stereotypical cause and effect and order of elements.

Conflict is considered an integral element of schism: escalating hostility of interactions (Bateson, 1935), a precondition (Hart & Van Vugt, 2006), or a key contributing factor (Asal et al., 2012; Balsler, 1997; Sani, 2005). "Counter-definitions of reality and identity are present as soon as... individuals congregate in socially durable groups" (Berger & Luckmann, 1966, p. 152). Whether certain types of conflicts are more likely to lead to schism (e.g., ideological) is a question asked but not satisfactorily answered.

Factionalisation is also considered characteristic of schism. Representations include groups in dynamic equilibrium (Bateson, 1935), subgroups (Tajfel & Turner, 1979), factions (Balsler, 1997; Dyck & Starke, 1999), pre-existing faultlines (Hart & Van Vugt, 2006; Lau & Murnighan, 1998), and subcultures (Boulding, 1969). These concepts are similar but not completely equivalent.

Different process models of schism have subtly different ways of simplifying the nature of social groups. Studies may assume schism begins in a social system whose dominant characteristic is unity, that divides in response to conflict. "Social dramas occur within groups of persons who share values and interests and who have a real or alleged common history" (Turner, 1980, p. 149). Others may assume inherent heterogeneity or division, activated by conflict. "Sociocultural systems are never logical systems or harmonious *gestalten* but are fraught with structural contradictions and norm-conflicts" (Turner, 1980, p. 157). Both can be true, including at the same time in the same social system. Assuming conflict precedes factionalisation or vice versa may oversimplify real-life contexts. Rather, factionalisation and conflict may develop in complex, iterative fashion. Examples of developing factionalisation in the literature include countercultures developing underground (Boulding, 1969), colonisation of nonprofit organisations by business logic, practice, and rhetoric (Maier et al., 2016), divergence of previously common beliefs (termed factionalism by Balsler, 1997),

or confronting and contesting ideological differences (Sani & Reicher, 2000). Subgroups and tensions between them appear to be inherent within groups, but conflict is not always activated.

Assumptions about the state of the social system prior to schism appear to affect how schism is represented in a model. In particular, if unity is assumed to be characteristic of a social system not in schism, then formal separation—mass exit—tends to be inferred as characteristic of schism. This is seen in process models which assume formal separation is definitional of schism (Balser, 1997; Dyck & Starke, 1999; Hart & Van Vugt, 2006; Sani, 2008). On the other hand, anthropologists study social systems where formal separation is problematic, and their theories tend to be inclusive of the entire process without assuming mass exit, for example, schismogenesis (Bateson, 1935) or social drama (Turner, 1980), which posit the process will end in system breakdown, or reintegration or schism (“schism” in the sense of division within a society), respectively.

In short, schism is often represented as a linear process including conflict, factionalisation, mass exit, and sometimes new group formation. Problematically, however, the order of elements and the inclusion of mass exit and new group formation is inconsistent.

Factors Associated with Schism Incidence, and Outcomes of Schism

Researchers are interested in “causes” of schism: termed contextual factors, sources of conflict, events, tipping points, or triggers (Balser, 1997; Bateson, 1935; Boulding, 1969; Dyck & Starke, 1999). Statistical associations found to date, between factors preceding schism and schism incidence, have been weak (Asal et al., 2012). Some factors can be unavoidable, such as leadership change (Balser & Carmin, 2009) or identity development (Kreiner et al., 2015), or ideologically desirable in a nonprofit setting, like distributed power (Gamson, 1975). Association is often conflated with cause, which could be an artifact of the apparent temporal order of events—the post hoc, ergo propter hoc fallacy. Why associated factors precede schism in one situation, but not another, is not well understood.

Identity and identity subversion are commonly seen as sources of schismatic conflict, with some studies focusing directly on them (Dyck & Starke, 1999; Kreiner et al., 2015; Sani, 2005). Other themes can be logically linked to identity, such as leadership change (Balsler & Carmin, 2009; Potz, 2016), membership criteria (Balsler, 1997), or professionalisation (Kalifon, 1991; Minahan & Inglis, 2005; Saltman, 1973). Schismogenesis (Bateson, 1935) and faultlines (Hart & Van Vugt, 2006; Lau & Murnighan, 1998; Thatcher & Patel, 2012) presuppose subgroups in tension based on identity-related criteria such as culture or demographics.

Beyond identity, supposed causes of schism become difficult to classify in any systematic and useful way. Lewis and Lewis (2009) posit five main contributing factors to religious schism: membership subgroups, personal ambition or personality conflict, doctrinal disagreements, death of a charismatic founder, and plural sources of legitimation. Several of these are identity related (e.g., existing subgroups, doctrine, death of founder), but others seem more related to power and change (e.g., ambition and personalities, legitimation struggles, and death of a founder can create a power vacuum as well as a potential identity change).

Power and change are evident in many schisms, but power and change are ubiquitous, so it is problematic to attribute causation. Striving for functional autonomy (Morgan, 1981) or an imbalance of power between subgroups (Prislin et al., 2000) have been theoretically proposed as contributing to conflict and schism. Harris (2015) found a breakdown of governance and communication to be the cause of a major conflict in a UK residents' association. Higher incidence of breakaway organisations was found in self-governing congregations compared to mainline churches (Dyck & Starke, 1999). In a quantitative study on ethno-political organisations in the Middle East, Asal et al. (2012) found factional leadership and the choice of violence as a tactic predicted schism, and previous occasions of schism indicated a higher likelihood of future schism. "Mission mirroring" has been observed, meaning internal conflicts tended to reflect the mission an organisation was created for (Allyn, 2011).

Balser (1997), echoed by Shriver and Messer (2009), argued for the profound effect of external factors on internal conflict leading to schism. This argument is consistent with other well-researched phenomena where the external environment is known to affect nonprofit organisations, for example, goal displacement and mission drift (Fitzgerald et al., 2014), becoming business-like (King, 2016; Maier et al., 2016), and isomorphism (Dart, 2004; Eikenberry, 2009; Meyer & Rowan, 1977).

Balser (1997) suggested group solidarity in decentralised social movements is facilitated by “strong leadership, munificent resources, and a strongly held collective identity” (p. 224). In a case study in a large Western Australian social service nonprofit organisation, Fitzgerald et al. (2014) suggested the capacity to counterbalance unwanted changes in external political policy may be aided by “leadership, good governance, adequate resourcing, and a strong commitment to vision and mission” which may not be available for smaller nonprofit organisations (p. 514). These authors portray organisational identity as a potential source of strength and a unifying force, which complements—rather than contradicts—identity as a focus of conflict.

Researchers are also interested in outcomes of schism. Perspective is salient when considering outcomes, and the focus can be on people, groups and organisations, or wider social systems. Smith and Berg (1987) observed “what may be experienced as painful and tension filled at the personal and interpersonal levels may be deeply comforting for the entire group” (p. 64). Assessment of schism outcomes is time dependent, and outcomes are multiple and differentiated.

Research into outcomes of schism at the human experience level is particularly hard to find, especially in organisation studies where the focus is firmly on the fate of the organisation. Hobbs (2011) reported the intense frustration of participants “locked in dispute” trying to communicate their views during a deteriorating negotiation she characterised as undergoing schismogenesis (p. 114). Schism has been associated with hostility (Bateson, 1935), and with agitation and dejection emotions and the loss of valued identities and relationships (Sani, 2008). In Dyck and Starke’s (1999) process model, participants reported a range of experiences: happiness and unity, excitement at

new ideas, alarm and resistance, judgment, hurt, perception of mistreatment and injustice, anger, demands for and threat of exclusion, and the realisation of being “finished with this church” (p. 801). In the same study, the pastor in each congregation was replaced during the schism or left shortly afterwards. In a self-help group started by parents of mental-health patients, professionalisation for the purpose of funding devalued the role of families who started the group and the principle and purpose they started it for (Kalifon, 1991).

From a group or organisation perspective, two commonly reported outcomes of schism are mass exit and formation of new groups. More than a few authors would consider these outcomes definitional of the process of schism (Balsler, 1997; Dyck & Starke, 1999; Potz, 2016). Arguably, however, schism can occur without ending in mass exit. Gamson (1975) suggested schism results in reduced access to external resources and reduced legitimacy or political voice. Schism has been associated with organisational decline (Miller, 1983) or demise (Fernandez, 2008; Gamson, 1975). In a quantitative study designed to examine reasons for organisational demise, however, schism or internal conflict was not found to be a statistically significant variable (Hager, 1999). The Mormon Church underwent multiple schisms after the lynching of their founder, Joseph Smith, resulting in minor differentiation of doctrine, and few successful splinter churches (Pozz, 2016). Balsler (1997) observed a complete spectrum of fates for the four organisations in her study: growth and success, maintenance, continued conflict over new issues, and “death” (p. 208).

At the system level, schism in social movements can have the effect of expanding the movement through the recruitment of new members, an expanding resource base, and strategic and tactical flexibility (Asal et al., 2012; Balsler, 1997). The Czech environmental movement underwent changes in response to a radically changing political environment, and schism of a leading organisation enabled two organisations to be formed, one committed to direct action and the other to advocacy and lobbying, thus expanding tactical range and effectiveness (Shriver & Messer, 2009). Schism can be seen as part of a system-wide struggle between equilibrium and creation, a metamorphosis enabling adaption, creativity, and innovation (Gorup & Podjed, 2015).

Schism has different normative connotations in different fields of study. In religious studies, it tends to be viewed negatively. Rapprochement of ancient schisms is a sincere goal of religious orders and scholars (e.g., Hovorun, 2017). In social and political movement literature, there is discussion of negative aspects but also adaptive, transformative, and growth benefits of schism (Asal et al., 2012; Balsler, 1997). In organisation studies, schism is most commonly seen as maladaptive (Allyn, 2011) and managing conflict is considered an important responsibility of leaders. Schism has sometimes been framed as positive in this field, for example, as a natural part of the process of ongoing identity construction (Kreiner et al., 2015), and an opportunity for transformation (Gorup & Podjed, 2015). Schism is perceived as facilitating social transformation, for example, the ordination of women clergy (Kreiner et al., 2015; Sani & Reicher, 2000).

What was not evident in the literature review was a perspective of schism as neither positive nor negative, or one which considered the nuance of multiple outcomes, depending on whose view was considered and when. Overall, schism research seemed to be overfocused on attempting to identify causes and outcomes of schism (Gamson, 1975; Harris, 2015; Miller, 1983; Minahan & Inglis, 2005). Overfocused, not because it is unreasonable to want to know why schism happens or what the consequences are, but because findings seemed myriad, inconclusive, inconsistent, oversimplified, and difficult to apply in practice. The patterns that should exist to explain the persistent and familiar phenomenon of schism were—disconcertingly—not evident in a review of the literature.

As part of the search for core commonalities in schism, six theoretical models were analysed in depth. These are discussed in the following section, along with associated case studies which used them as a theoretical framework and extended or refuted their findings.

Theoretical Perspectives on Schism

Six representations of schism in the literature were selected as core theoretical works and are presented in Table 1.

Table 1 Six Core Theoretical Models in Schism Literature

	Bateson (1935)	Turner (1980)	Balser (1997)	Dyck & Starke (1999)	Sani (2005, 2008)	Hart & Van Vugt (2006)
Field	Anthropology	Anthropology	Social movement	Organisation studies	Social psychology	Social psychology
Model	Schismogenesis	Social drama	Impact of environmental factors on factionalism and schism	Process model, formation of breakaway organisations	Social psychological model of schism	Faultline to group fission
Setting	Culture contact Acculturation	Societies	4 social movement organisations	14 self-governed religious congregations	Church of England	Small groups
Level of Analysis	Social system	Social system	Organisation	Organisation	Organisation	Group
Methodology	Theoretical	Ethnographic	Case studies, inductive theory building	Multiple case study, inductive theory building	Case study, social identity framework, hypothesis testing	Experiment, introduced conflict, hypothesis testing
Schism Concept	Inherent process	Division within society	Formal separation from organisation	Formal separation from organisation, new group	Formal separation from organisation	Formal separation from group
Terms used	Schismogenesis	Social drama for process; schism state of system	Schism	Breakaway, not schism	Schism	Fission, not schism
Conflict	Internal: symmetrical and complementary interactions	Internal: breach of group norm	External: political, relational, resources Internal: membership, strategy, tactics, goals	Internal: doctrine, activities External: new ideas, legitimising event	Internal: perceived identity subversion	Internal: free-riding
Factionalisation	Cultures	Hidden (deeper) divisions	Factions	Change and status quo	Change and status quo	Demographic faultlines
Google Scholar Citations 24 April 2022	641	1343	137	148	139 & 38	93

These works were cross cited, and cited in other schism literature, and emerged as the most relevant models for the purpose of comparing and contrasting theoretical concepts. They could not be simply integrated and still retain their individual value and integrity because they differed in fundamental ways. At the same time, none was clearly seminal nor influential enough to eclipse the others, as can be seen by the number of Google Scholar citations. It is noteworthy that most of this work was done more than 20 years ago; even Sani's model was published in an early form in 2000 (Sani & Reicher, 2000). The models are discussed below in order of publishing date, and coincidentally also by field. The focus of discussion is how each model contributes concepts and tensions to theoretical perspectives of schism.

Bateson (1935)—Schismogenesis. In this anthropological discussion paper, Bateson (1935) theorised about two distinct cultures coming into close contact, in the sociohistorical context of colonialism. He posited the outcomes may be fusion, elimination, or “the persistence of both groups in dynamic equilibrium within one major community” (p. 179). Elaborating on the third possibility, he discussed the conditions which keep existing subgroups together, compared to *schismogenesis*, whereby subgroups progressively become more differentiated and hostile via symmetrical or complementary escalations, leading to an eventual breakdown of the system as a whole.

Reciprocity was posited as a factor which may restrain schismogenesis, whereby each interaction is asymmetrical but overall symmetry is attained (Bateson, 1935). Bateson also considered mutual dependence between groups, external threat, distraction, and cooperation of responsible leaders as restraining factors; these were all circumstances he judged unlikely to occur and prone to eventual schismogenesis. In the absence of either fusion or elimination, therefore, both cultures would exist in a state of dynamic equilibrium characterised by weak unifying forces counterbalancing a tendency towards schismogenesis.

Morgan (1981) used the concept of schismogenesis in his schismatic metaphor for organisations. This metaphor highlights the internally conflicted and disintegrative nature of organisations, in contrast to the familiar organism and machine metaphors (Morgan, 1980, 1997).

Boulding (1969) elaborated on schismogenesis in the sociohistorical context of the civil rights movement. He argued subgroups form underground through shifts in identity, which are perceived as threats to the existing structure, and suppressed. When these latent identities become manifest, the group may split apart, or stay together if new needs can be legitimised and accommodated. Boulding identified threats and mutual demands for sacrifice as exacerbating schismogenesis, and exchange as a stabilising factor, and agreed with Bateson that once the process begins it is hard to stop.

Gorup and Podjed (2015) applied a schismogenesis lens in a Slovenian birdwatching organisation and a university in the Netherlands. The authors considered schism normatively positive and used the term *creative deconstruction* to represent the normal and inevitable reinterpreting of social realities which creates both schism and equilibrium. Hobbs (2011) applied schismogenesis to a dispute between developers of a proposed salt mine and environmentalists in Exmouth, Western Australia. She described the process as a practically limiting and emotionally frustrating experience for participants. There was a lack of trust in each other's motives, and the two groups had different value systems, points of view, and tests of legitimacy. The argument was framed in only one logic, objective rationality, prejudicing one view. Notably, as long as there was hope of influencing the final outcome the dispute continued, but schismogenesis led to increasingly simplified and polarised communication and no viable compromise.

Turner (1980)—Social Drama. A notable contribution to schism research from anthropology is Turner's (1980) social drama model. Turner posited four stages of social drama: "breach, crisis, redress, and *either* reintegration *or* recognition of schism" (p. 149). According to the model, breach occurs through the public violation of a norm, which represents deeper division. Crisis is thus precipitated, conflict becomes overt, factions form, and the breach tends to widen and spread, unless limited quickly. In the redress phase, formal and informal mechanisms, both legal and ritualistic, are employed to resolve the crisis. Resolution may involve a sacrifice (scapegoat), reintegration, or recognition of schism, which can include formal separation or not. Notably, Turner

used the term “social drama” for the whole process (termed “schism” in this thesis) and “schism” to represent an unresolved division within a society.

Liminality is a concept highlighted in social drama that has garnered some interest in business and organisation studies in the context of change management because of its association with transformation (McCabe & Briody, 2016; Walker, 2019; Winkler & Kristensen, 2021). *Liminality* is “indeterminacy... that which is not yet settled, concluded, and known.... All that may be, might be, could be, perhaps even should be. It is that which terrifies in the breach and crisis phases of a social drama” (Turner, 1980, p. 157). Through processes of redress, people construct a new reality or identity, and indeed reconstruct past events to give them meaning and an appearance of order. Turner noted redress evokes reflexivity, articulates experiences, and remakes cultural sense, calming fears of ambiguity and uncertainty. Social drama then, is a mechanism of societal transformation situated within a local and sociohistorical context.

Briody (2016) used a social drama lens in an autoethnography, finding the stages of the model a difficult fit to her own lived experience. She challenged a view of division as essentially unidirectional, arguing actors make multiple attempts at redress and have agency to affect the nature of the schism experience and the resolution.

Some schism researchers have been interested in whether certain types of organisations or conflicts, especially ideological or mission based, are more prone to schism. Turner (1980) theorised claims based on a single principle can be rationally adjudicated “but when claims are advanced under different social principles, which are inconsistent with one another even to the point of mutual contradiction, there can be no rational settlement” (p. 155). This is consistent with schism incorporating a paradoxical divide between worldviews, and the observation of conflict being inherent when there is a multiplicity of frames (Benford, 1993; Kaplan, 2008), logics (Besharov & Smith, 2014; Hobbs, 2011), goals and stakeholders (Fitzgerald et al., 2014), or in paradox (Fairhurst et al., 2016; Schad et al., 2016).

Balser (1997)—Impact of Environmental Factors. Five of the six core models focus on conflict within a social system. Balser (1997) believed this approach limiting and advocated for an open system view. Balser constructed a framework of environmental factors affecting factionalism and schism in social movement organisations. The framework emerged from an inductive study of four cases of schism in social movement organisations in the United States (union, civil rights, environmental, political) and has four categories: political opportunity structure, social control mechanisms, external resources, and relationships with other organisations. Overall, this framework is the strongest for representing fields of power. It highlights the limitations of studying organisations as bounded entities and shows how power crosses boundaries in both directions.

Balser's framework was supported by Shriver and Messer (2009) in their study of the Czech environmental movement under different political regimes, where changing levels of political repression, freedom, and opportunity led to conflict over strategy and tactics, and thereby the splintering of an influential environmental organisation. In a quantitative study of ethnopolitical organisations in the Middle East, however, Asal et al. (2012) did not find a statistically significant correlation between external political factors and schism.

Dyck and Starke (1999)—Formation of Breakaway Organisations. Dyck and Starke (1999) undertook a multiple case study of self-governing religious congregations: eleven where mass exit and new group formation occurred and three where the group settled in a state of dissonant harmony. The authors developed a six-stage process model, with specific trigger events for moving through stages. The stages (and triggers) were relative harmony (conflicting ideas event); idea development (legitimising event); change (alarm event); resistance (polarising event); intense conflict (justifying event); and group exit. Dyck and Starke did not use the term schism, but this model is referred to in schism literature (e.g., Desan, 2019). An earlier publication of the research was cited by Balser (1997) and described as a "process model of schism" (p. 226).

The researchers asserted triggering events did need to occur. The idea-development stage lasted 23 years in one case, whereas in another it was momentary as the conflicting-ideas event and

the legitimising event were concurrent (Dyck & Starke, 1999, p. 802). The time spent in each stage decreased as the process developed, aligning with other schism models featuring escalation (e.g., schismogenesis, Bateson, 1935).

The legitimising event was supplied by an incoming leader, usually a pastor, or an outside authority (Dyck & Starke, 1999). The notion of legitimising authority is relevant to changes in nonprofit organising seen in the current research, for example, legislation prescribing corporate governance (*Associations Incorporation Act 2015*) and nonprofit organisations employing more leaders with business backgrounds (Fitzgerald et al., 2014). Professionalisation of lived experience and practice-based nonprofit organisations is a common factor in schism case studies (e.g., Kalifon, 1991; Saltman, 1973). Managers from the business sector may supply legitimising authority for business practices, but also for business logic, values, and discourse (Dart, 2004; Maier et al., 2016).

Apart from the legitimising event, considered inadvertent by the authors, they were surprised to find “far from being indispensable for managing in turbulent times, leaders were instead dismissed during the events leading up to the breakaway or shortly after group exit occurred” (Dyck & Starke, 1999, p. 819). Leadership and power structures, and the agency and fate of leaders during schism, are indeed matters of interest which curiously do not feature in the six models. Case studies do explore the role of individual leaders (Desan, 2019; Kalifon, 1991; Potz, 2016) but there seems to be a disconnect when cases are abstracted to theory.

In the three cases where group exit was avoided, small differences were identifiable, compared to the other eleven cases. The legitimising event was transparent and deliberate rather than inadvertent, and a polarising event was avoided in favour of a harmonising event, resulting in dissonant harmony rather than intense conflict (Dyck & Starke, 1999). The authors observed more willingness to compromise, the absence of external mediators and more internal attempts at reconciliation, an earlier taking of sides but more willingness to listen, fewer and earlier appearances of high emotions, fewer secret meetings, and fewer calls for other members to leave (Dyck & Starke, 1999). These observations have similarities with other models and findings. Communication

breakdown is a key factor in schismogenesis (Bateson, 1935; Hobbs, 2011). McCabe and Briody (2016) pointed out the need for translators when different logic systems are acting. Disrupting the escalation of conflict is noted in schismogenesis with reciprocity (Bateson, 1935) or accommodation of subgroup identity (Boulding, 1969), and in social drama as redress (Turner, 1980) or attempts to reconcile (Briody, 2016). Factionalisation—taking sides—did not inherently inflame the conflict, which is supported by Hart and Van Vugt (2006). Not calling for the other faction to leave may have reduced identity threat responses. The mention of emotions was interesting, suggesting early expression may benefit rather than hinder resolution of issues.

Dyck and Starke's (1999) study began with the assumption of identity and identity change as an antecedent of conflict, and this manifested in three themes: strategy, governance, and doctrine. Balance of individual versus group behaviour was examined. Subgroups developed their own identity at different times (change group first, status quo group after alarm event); the identity of the whole group varied in salience compared to the subgroup. The authors concluded that new group formation is a "valuable variant of community building" rather than "disruptive" or a "failure of leadership" (Dyck & Starke, 1999, p. 820).

Dyck and Stark's (1999) model emerged from research focused on the formation of new groups, not schism per se, and used a theoretical framework featuring Hirschman's (1974) exit–voice–loyalty model. It is therefore predisposed to focusing on frustrated change efforts. In each of the eleven cases where a new group formed, the change faction left the superordinate group. This pattern is not generalisable to all schisms, and in fact the social psychological model of schism discussed next claims the opposite. All six models have a degree of context specificity which limits their generalisability.

[Sani and Colleagues \(2005, 2008\)—Social Psychological Model of Schism](#). Sani and colleagues (Sani, 2005, 2008; Sani & Pugliese, 2008; Sani & Reicher, 2000; Sani & Todman, 2002) developed a social psychological model of schism using social identity theory as a theoretical framework, and tested it quantitatively using the Church of England's conflict over the ordination of women (Sani &

Reicher, 2000; Sani & Todman, 2002). The model was later refined, and applied to historical studies of the Italian Communist Party and the Italian political party, Alleanza Nazionale (Sani, 2008).

Sani's (2005, 2008) model defines the relationships between several variables: identity subversion; dejection–agitation emotions; *entitativity*, meaning perception of group wholeness; identification; voice; and schismatic intention. The model posits when a change to a group norm occurs, some members may perceive that the group identity is being subverted. This perception increases schismatic intention, mediated by an increased degree of dejection and agitation emotions and a lowered level of group identification. Perception of identity subversion also decreases sense of entitativity, lowering group identification further. The mediating effects of dejection–agitation and group identification are moderated by perceived ability to voice dissent. Exiting the group is a way to avoid emotional distress over a new identity which does not fit with a perception of what the group should or could be. Members are less motivated to belong if they identify less with the new group identity and perceive less cohesion within the group. The perception of having a voice, an active role, and respect, lessens intention to leave (Sani, 2008). Anger was also observed along with dejection–agitation in the case of the Alleanza Nazionale, and anger was more likely when change came as a surprise (Sani, 2008).

Importantly, the group instigating the change did not perceive the new norms as subverting the identity of the group, rather as a development which strengthened and enhanced core identity (Sani, 2005). Identity, even historical, was characterised as an ongoing, contested social construction: "a matter of argument" (Sani, 2008, p. 726). This finding was supported by a study in the Episcopal church, introducing the concept *identity elasticity*, whereby the group is more likely to stay together if ongoing identity construction is elastic enough to encompass everyone's changing identity needs (Kreiner et al., 2015).

The social psychological model has a strong theoretical base in social identity theory, and has supported some relatively more recent research (e.g., Wagoner et al., 2019; Wagoner & Hogg, 2016). The model provides insight into psychological processes in people's lived experience of

schism, the importance of social identities for well-being, and how the salience and meaning of social identities can be adjusted to reduce the cost of identity exit. The model has some limitations. The most important in the context of the current research is the focus on the schismatic intention of individuals, rather than collective behaviour and/or actual exit. As noted by the author, the research was done in the context of ideological groups and its significance for task-oriented groups is untested (Sani, 2008). Common to most of the core models, lack of generalisability is imposed with the presumption that schism is triggered in a certain way, in this case by the perception of group identity subversion. Further, the model shows the status quo group exiting which, as mentioned previously, is the reverse of the findings of Dyck and Starke (1999).

Hart and Van Vugt (2006)—Faultlines and Group Fission. Demographic differences in groups create pre-existing *faultlines*, a concept used in the study of diversity and subgroup conflict in organisations (Lau & Murnighan, 1998; Lau & Murnighan, 2005; Thatcher & Patel, 2012). Hart and Van Vugt (2006) used the faultline concept to explore group *fission*, which they defined as when “two or more group members, in conjunction, exit their parent group to either establish a new group... or join a different group,” synonymous with “schisms, factions, group exits, or breakaways” (p. 392). This metaphor of nuclear physics allows that fission occurs through forces internal or external, and that the products cannot recreate the original. This work questioned how, and under what conditions, small groups might go about changing their boundaries.

Hart and Van Vugt (2006) hypothesised group fission would be facilitated by the existence of two conditions, namely conflict and faultlines (or subgroup boundaries). They utilised the theory of social dilemmas, specifically free-riding, to trigger conflict. They were surprised to find strong subgroup boundaries did not predict fission but, if fission occurred, the boundaries predicted the makeup of the resulting subgroups. The important finding of this research was the implication that conflict was the force behind division, and not the existence of faultlines per se.

This research, in the form of laboratory experiments, may have suffered from lack of real-life subgroup identification and also real-life conflict (Hart & Van Vugt, 2006). Free-riding, a source of

conflict drawn from economics, does not feature as a predictor of schism in other models reviewed. It may be salient where resources are limited, especially in task-oriented organisations. Hart and Van Vugt discussed the social and adaptive benefits of small versus large groups, positing schism may act as an adaptive capacity by increasing cooperation levels within each group. This is a counterpoint to the speculation in organisation studies of small size as a liability (e.g., Hager et al., 2004).

Qualitative Schism Research

Other qualitative research was explored as a subset of schism research. Some authors used one of the six core models as a conceptual framework for a case study, others used alternate theories or conducted their own inductive, theory-building research. There was some support found for the six core models, but not all authors found a good fit. Specific findings in each publication contributed to understanding aspects of schism. Table 2 is a sample of findings that illustrates the rich variety of insights gleaned from this literature, and also the lack of focus and coordination across schism literature. Findings from this subset of schism literature were retained as a priori knowledge held in abeyance, along with the models, throughout the inductive–abductive research process.

Table 2 Insights from Qualitative Schism Research

Author (Date)	Findings Contributing to Understanding of Schism
Allyn (2011)	Groups experience conflict related to the mission of the organisation.
Balser and Carmin (2009)	Organisational identity conflict exposed in transfer of power during leader succession.
Briody (2016)	Repeated attempts to resolve problems. “Actions restorative of peace.” (p. 131) Stages of social drama (Turner, 1980) did not conform well to the details of the case.
Desan (2019)	Social construction of a doctrinal schism, stemming initially from tactical schism. Neo-socialism was transferred back into the past as if it had always existed. Cause and effect in schism has been misinterpreted.
Fitzgerald et al. (2014)	Need leadership, good governance, adequate resourcing, and strong commitment to mission and vision; extra strain on small organisations as they may not have these. Increasing tendency to hire managers with business over nonprofit background.

Author (Date)	Findings Contributing to Understanding of Schism
Gorup and Podjed (2015)	Boundaries between conflicting groups are unclear and malleable.
Harris (2015)	<p>Not everything can be guarded against with governance policy, procedure, and practice.</p> <p>“A major organizational crisis within a community association had been, the data suggested, precipitated by a small group of people.” (p. 804)</p> <p>Small nonprofit organisations are more likely to have knowledge borrowed from business or government jobs than from nonprofit sector.</p> <p>Challenge is to disseminate research as there is no single explanation.</p>
Hobbs (2011)	<p>Different value systems, points of view, tests of legitimacy.</p> <p>Lack of trust. No meaningful communication, no compromise.</p> <p>While still hope to influence outcome, remain locked in dispute.</p>
Kalifon (1991)	<p>Growth and professionalisation led to values clash.</p> <p>Too many goals, volunteers already stretched.</p>
Kretschmer (2017)	<p>“Formalization does not have a uniformly protective effect against schism.” (p. 421)</p> <p>Power disadvantage when isolated from central office, no access to communication channels to spread ideas.</p>
Minahan and Inglis (2005)	<p>Corporate techniques are not easily transferred to nonprofit organisations due to more complex goals and multiple stakeholders.</p> <p>Strategic planning process undergone for legitimacy or funding reasons, not (strategically) effective in this case.</p>
Pötz (2016)	<p>Schism is a rational response to perceived powerlessness.</p> <p>Power struggles were single most important factor in schisms, over and above doctrine and everyday matters such as economics, although these were used as justifications ex post.</p> <p>If a dissenter did not get what they wanted by force of argument, they gathered supporters (not necessarily by ethical means). If they gained significant power, but lost, they were excommunicated or exiled.</p>
Puustinen et al. (2012)	When different logics of decision making exist, power overwhelms one.
Saltman (1973)	<p>Lack of clarity around goals and ideology allowed conflict.</p> <p>Goal displacement and unintended consequences due to funding and task focus.</p> <p>Rationales based on perception not fact.</p> <p>External–internal factors not a viable distinction.</p>
Shriver and Messer (2009)	External political situation contributed to schism within organisation, and reduced coalition building between organisations.

These and other cases added detail and nuance, provided new insight and contraindicators, addressed emerging questions, and occasionally refuted theoretical representations. Power, leaders, and leadership were more visible in the cases, compared to the models. A leader change led to schism in at least three different situations (Balser & Carmin, 2009; Briody, 2016; Potz, 2016). The effects of external legitimacy requirements, funding requirements, and isomorphism were evident, especially in the context of professionalisation and nonprofit organisations becoming more business-like (Fitzgerald et al., 2014; Kalifon, 1991; Maier et al., 2016; Minahan & Inglis, 2005; Saltman, 1973). Power was seen as influential in individual cases, for example, schism seen as a power struggle (Potz, 2016); capacity to control communication, agendas, and acceptable rationalities (Hobbs, 2011; Kretschmer, 2017; Puustinen et al., 2012); and the relative impotence of formal governance against determined individuals (Harris, 2015; Kretschmer, 2017).

Cases noted real-life complexities, such as the untidiness of factionalisation and boundaries (Gorup & Podjed, 2015; Saltman, 1973), the realities of trying to do a lot with a little in nonprofit organisations (Kalifon, 1991), the phenomenon of perception being as important as reality when it came to how people responded (Saltman, 1973), the importance of trust (Hobbs, 2011), and that history is routinely rewritten retrospectively to fit a narrative (Desan, 2019). Case literature emphasised that schism is messy, unpredictable, and complex—above all, it is *human*.

Harris's (2015) case study, of a UK neighbourhood association, crystallised some particular issues faced in small nonprofit organisations, including the key but problematic step of disseminating nonprofit research. "The aim was to *explain* the roots of the crisis to help the [organisation] to develop structures, policy, and processes that would—as far as possible—prevent a similar organizational crisis recurring" (p. 804). Harris identified theories which applied to the conflict, but noted that events could be explained in different ways, the combination of theories was specific to this case, and not all problems could be guarded against in policy (Harris, 2015). An important point made was that community organisation members were more likely to have knowledge borrowed from business or government than from nonprofit research or practice.

Quantitative Schism Research

There are an extremely limited number of quantitative studies directly focused on schism. This is not unexpected, given quantitative research is more suited to testing than developing theory, and is inherently disadvantaged when the phenomenon being studied has multiple variables with complex interactions. Nevertheless, during the current research, questions about specific aspects of schism surfaced which had been approached by quantitative schism researchers, and this aided in theory development.

Relationships between variables in Sani's social psychological model were quantitatively tested, and new variables added later, notably emotions (Sani, 2005, 2008; Sani & Reicher, 2000). Using this model as a theoretical framework, Wagoner et al. (2019) found that individual exit and schism are both ways to exit a group, but driven by different motives and psychological factors. In the same study, data fit better when "subgroup exit" and "new group formation" were treated as separate variables.

Some quantitative research focused on organisational demise has included schism as a possible contributing variable. One of these was Gamson's (1975) study of 53 groups, operating from 1800–1945, which found 43% of these groups experienced formal schism (Balsler, 1997, p. 211). The predicting variable was the decentralisation of authority, and Gamson conjectured inadequate internal conflict resolution mechanisms were the reason for schism. Neither Fernandez (2008) nor Hager (1999) in their quantitative studies found schism to be a statistically significant predictor of organisational demise.

Research by Asal et al. (2012) studied factors predicting schism—as distinct from studies above of whether demise involved schism (Gamson, 1975), or schism predicted demise (Fernandez, 2008; Hager, 1999). Factionalised leadership and violence as a tactic were significantly correlated with schism, although factionalised leadership was also found to have benefits for social movement strength and growth (Asal et al., 2012). Age of organisation, legal status, state repression, and reliance on external resources were not statistically significant predictors of schism. This study

supported factionalised leadership as related to schism, but not research on external political environment (Balsler, 1997) nor newness as a liability (Hager et al., 2004). Previous schism made schism statistically more likely (Asal et al., 2012). These authors also found ethnopolitical (communal) groups more prone to schism than associative groups, speculating members in communal groups placed paramount value on collective identity.

As with the theoretical models and qualitative studies, quantitative findings became a priori knowledge, a part of the whole. To better understand nuance in schism literature, and in an attempt to situate schism among other social processes, literature was sampled in a variety of other fields. Three of these—identity, power, and sensemaking—are considered next, before returning to summarise and problematise schism literature, and frame the research questions. Identity was an important theme emerging directly from schism literature. Power and sensemaking became more salient as the research data began to play a role in understanding schism.

Identity

Identity as a focus of internal conflict was a recurring theme in schism literature. Identity literature is extensive and separated into two main strands: identity theory has roots in psychology and symbolic interactionism and focuses on individual role-related behaviours; social identity theory has roots in sociology and social psychology and focuses on group processes and intergroup relations (Hogg et al., 1995). Social identity theory is the focus of this section because it forms a conceptual framework for some schism models (Hart & Van Vugt, 2006; Sani & Todman, 2002). Having said that, schism has aspects of both group and individual behaviour. Future research into the leader role in schism may be informed by identity theory, since leaders in this study displayed high *salience* and *commitment* vis a vis their leader role, two concepts of particular interest in identity theory (Hogg et al., 1995).

Social identity theory posits that part of a person's self-image is comprised of the social categories they belong to (Ashforth & Mael, 1989; Tajfel & Turner, 1979). *Self-categorisation theory*

suggests individuals identify as a member of a group, and adopt norms consistent with the group identity, essentially becoming *depersonalised*. “They are perceived as, are reacted to, and act as embodiments of the relevant in-group prototype rather than as unique individuals” (Hogg et al., 1995, p. 261). Social identities are thus descriptive and prescriptive. They are also evaluative; group members are motivated to behave in such a way as to distinguish their group from others, and achieve and maintain favourable ingroup–outgroup comparisons (Hogg et al., 1995; Tajfel & Turner, 1979). Conflicts can become entrenched when distinctiveness is based on *mutual disidentification*, “defining who one *is* based on who one is *not*” (Fiol et al., 2009, p. 34).

Identities are plural, and often lack congruence, which can lead to internal tension and conflict. For individuals, tensions are not usually managed by integrating identities, because integration is both cognitively taxing and reduces identity utility (Ashforth & Mael, 1989). Rather, identities can be ordered by value or salience, they can be enacted in different contexts or at different times, and values clashes can be suppressed when entering different roles.

Individuals’ multiple identities are a combination of *personal identities*—unique traits and characteristics—and *social identities* (Petriglieri, 2011). Social identities can be ascribed, like race or gender, or achieved or voluntary, such as profession, sporting team, or membership of an organisation. Identities are valued, have meaning, are social and enacted, and vary in importance and salience. Identities contribute to self-worth, and people are motivated to maintain them, yet they are also dynamic (Petriglieri, 2011).

Petriglieri (2011) defined *identity threat* as “an experience appraised as indicating potential harm to the value, meanings, or enactment of an identity” (p. 641). Petriglieri developed a typology of individual identity-threat responses, which sheds light on how people respond to threats to social identities during schism. *Identity-protection* responses—derogation, concealment, and positive-distinctiveness—protect the identity by targeting the source of the threat: by invalidating the source, concealing the identity, or promoting the identity. Social support increases the use of identity-protection responses, which fits with factionalisation and comparative ingroup–outgroup

processes observed in schism. *Identity-restructuring* responses—importance change, meaning change, and identity exit—reduce the threat of harm by reducing the importance or changing the meaning of the identity to the person. All three identity-restructuring responses are observable in schism. Of particular note, *identity exit* involves abandoning the identity and physically disengaging from any associated role or group and is “potentially very costly to the individual” (p. 648). People are more likely to exit an identity if the threat is great and if there are substitute identities available (Rudy & Greil, 1987). Psychological stress in response to identity threat is greater when the identity is highly valued by the person because it is more important to their sense of self (Petriglieri, 2011).

Social identification with one’s group is extremely powerful (Tajfel & Turner, 1979). Since social identities are part of a person’s own self-image, threats to the identity or continued existence of the group can be perceived as threats to the identity of the person (Petriglieri, 2011). New ideas or pressure for change can be perceived as criticism of, or threat to, a valued identity. This perception of criticism or threat may be felt at different levels, including sector level. “Demands to be ‘more business-like’ appear to threaten the perceived uniqueness of the NfP sector” (Fitzgerald et al., 2014, p. 514).

Social identity theory addresses observations of intergroup conflict and stereotyping (Tajfel & Turner, 1979). Challenging the relative status of subgroups, as opposed to individual social mobility, is a way schism can develop. “A group that believes its lower status position is illegitimate and unstable... and that a different social order is achievable will show marked solidarity and will engage in direct intergroup competition” (Hogg et al., 1995, p. 260).

A second view on the development of schism is from identity changes within a group. For instance, schism can occur when a subgroup identity becomes salient and is in conflict with whole group identity (Hart & Van Vugt, 2006). The perception that core historical principles, on which the group’s identity is based, are being subverted may lead to factionalism and schism (Sani & Reicher, 2000). Latent disagreement about organisational identity can become salient during leader succession, especially when founders leave (Balser & Carmin, 2009).

Organisational identity is based on the notion that an organisation is an entity, which can have its own identity, defined by the organisation's claimed central character and distinctiveness, which have a degree of temporal continuity (Albert & Whetten, 1985). The aspect of temporal continuity is questioned by some, who advance the idea that identity is dynamic and contested, even retrospectively (Desan, 2019; Kreiner et al., 2015), and that identity fluidity is an adaptive capacity (Gioia et al., 2000). People expect to negotiate group norms in an active, common quest for agreement (Sani, 2005). The ongoing process of identity contestation and construction is a source of tension. "Schisms can involve considerable identity challenges for members, as taken-for-granted assumptions about identity seem to disappear" (Kreiner et al., 2015, p. 1003). Potential for conflict is inherent, but holding group and subgroup identities in tension, rather than integrating them, increases utility and enables greater adaptability (Albert & Whetten, 1985). In the nonprofit context, it serves to balance day-to-day realism with ethos and purpose (Bush, 1992). Importantly, it can guard against collapsing the unique nonprofit logic into a business logic (Maier et al., 2016; Nyberg & Wright, 2013; Sanders & McClellan, 2012).

The transition from everyday intragroup conflict within a superordinate group, to intergroup conflict between subgroups or factions, is not well understood; furthermore, the dynamics of intragroup and intergroup conflicts are often treated separately (Ashforth & Mael, 1989; De Dreu, 2010; Tajfel & Turner, 1979). This separate treatment poses a problem for modelling conflict resolution during schism, since the salience of subgroup identity relative to whole group identity is not a clear transition.

Identity as a powerful root cause of conflict was a relatively novel proposition when first theorised by Tajfel and Turner (1979). It challenged the hegemony of "realistic group conflict theory," a term coined by Campbell. Realistic group conflict theory, based on Sherif's Robbers Cave Experiment, hypothesised scarce resources (e.g., status, wealth, material goods, power) as the source of group conflict (Brief et al., 2005). The power of group identity is more than the sum of personal identities and interpersonal relationships (Ashforth & Mael, 1989). People in a group or

organisation share an emotional involvement in the group identity and expect to share in constructing that identity (Sani & Reicher, 2000), arguably more so in nonprofit organisations. It is not surprising to find identity as a dominant theme in schism literature.

Power

Power is inescapable in organizations. It is literally everywhere. (Fleming & Spicer, 2014, p. 274)

There is simply no way to talk about schism, organisations, or relationships between people, while avoiding the topic of power. Avoidance of the concept of power is nevertheless well recognised in organisation studies (Clegg et al., 2006; Fleming & Spicer, 2014) and notably, power was not a significant aspect of the six core models of schism. Power has been recognised as an essentially contested concept (Lukes, 1974). No treatment here can possibly address the extensive literature, and the purpose of this section is only author positioning.

Of interest in this thesis is what power does, who uses it, how and for what ends, and whether the intended effects of the exercise of power turn out to be the actual effects. Moreover, of interest is how communities of people go about transforming what power is used to do, by what means, and by whom. In a Foucauldian view (and in social constructivism) power, and technologies of power (machineries of universe-maintenance, in Berger & Luckmann, 1966), are not fixed but subject to construction and deconstruction in local and sociohistorical context. Schism is one social process whereby groups may reconsider the distribution of power (Turner, 1980).

Author positioning on power as a theoretical concept is primarily based on the works of Berger and Luckmann (1966), Clegg et al. (2006), and Haugaard (2020), with a fuller understanding developing iteratively throughout the project (Adler & Borys, 1996; Alvesson & Spicer, 2012; Barter & Russell, 2013; Bencherki et al., 2019; Boje & Rosile, 2001; Clegg, 1989; Cooney, 2007; Dart, 2004; Fligstein, 2001; Foucault, 1977; Holford, 2020; Kalberg, 1980; King, 2016; McHoul & Grace, 1993; Meyer & Rowan, 1977; Putnam et al., 2016; Schildt et al., 2020; Zoller & Fairhurst, 2007). Social

constructivism (Berger & Luckmann, 1966) is discussed further in Chapter 3. *Power and Organisations* (Clegg et al., 2006) is a consummate analysis of conceptualisations of power, arranged historically, and applied to the context of organisations and organising. Haugaard's (2020) *The Four Dimensions of Power: Understanding Domination, Empowerment and Democracy* integrates power with conflict and conflict resolution from a sociological perspective.

Power is conveniently considered through a four-dimensional lens which seems relatively well accepted (for a review, see Fleming and Spicer, 2014, "Power in Management and Organization Science"). Concepts associated with each of the four "dimensions," "levels," "forms," or "faces" of power are attributed to (a) Dahl (1957), for example, coercion, violence, and authority (direct and episodic power), (b) Bachrach and Baratz (1962), for example, manipulation, dominant ideology, and agenda setting (indirect and episodic power), (c) Lukes (1974), for example, domination, hegemony, and reification (systemic power): "To the extent that meanings become fixed or reified in certain forms, which then articulate particular practices, agents and relations, this fixity is power" (Clegg, 1989, p. 183), and (d) Foucault (1977), *subjectification*, which refers to the making of the social subject, including socialisation, "internalization of self-restraint" (Haugaard, 2020, p. 150), and *ontological security*: "an inner certainty concerning the continued existence of the world-out-there, both social and material" (Haugaard, 2020, p. 144), a state of being which can be challenged during schism.

As with schism, power is often considered in a negative light. While "power is not violence... power makes violence easier to impose, both morally and practically" (Clegg et al., 2006, p. 181). Institutionalisation and isomorphism have a stabilising role to play but also have a coercive side (Cooney, 2007; Dart, 2004; Fligstein, 2001). Certainly, power relationships in organisations can be dysfunctional (Alvesson & Spicer, 2012). Power and resistance are often opposed to each other (Zoller & Fairhurst, 2007) but these dualities are constructions. Power and management theorist and practitioner, Mary Parker Follett, rejected such dualities and advanced the concept of *co-active power*—power enabling people to achieve things cooperatively (as discussed in, e.g., Boje & Rosile,

2001; Clegg et al., 2006). The exercise of power in a shared undertaking is what organisations are for, after all. Above all, power and its exercise are subjective. Power “not only represses and controls, but also produces behavior both desirable and undesirable, depending on the political lens through which one views it” (Fleming & Spicer, 2014, p. 274).

In this thesis, the proposition that power is not something that is possessed by a person or fixed in a role or institution is accepted: power is relational, and constructed and legitimised by people (Clegg et al., 2006; Haugaard, 2020). Participants, however, spoke and acted as if—in their particular context at that particular time—power was a real “thing” people “have.” Power was perceived as a resource, with some resources of power available to particular people and factions and not others (Sewell Jr, 1992). An existing configuration of power was not necessarily fixed, rather it was malleable and multidimensional. Whether a challenge to the fixity of the current power arrangement was consciously articulated or not, people responded in schism by acting to shift the balance of power. Participants’ intuitive understanding and experience of power is portrayed in this thesis, with acknowledgement of a degree of theoretical imprecision, but also appreciation for a sophisticated practical knowledge. This research is not about the nature of power per se, rather how power is experienced and enacted. “Power can become real when it is treated as real, which is its most pervasive mode”—and in this mode the *consequences* of power become real (Clegg, 1989, p. 207).

Sensemaking

Facts rarely speak for themselves—and never in isolation... Narratives and stories feature prominently as sense-making devices, through which events are not merely infused with meaning, but constructed and contested. (Gabriel, 2004, p. 62)

Several areas of literature informing this research explore the role of language in social construction: metaphor (Cornelissen & Kafouros, 2008b; Cornelissen et al., 2005; Lakoff & Johnson, 1980; Morgan, 1980, 1981, 1997, 2016), discursive construction of organisations (Fairhurst & Putnam, 2004; Grant et al., 2004), narrative (Gabriel, 2004; Polkinghorne, 1995; Rhodes & Brown,

2005; Sandelowski, 1991; Zilber, 2017), and sensemaking (De Rond et al., 2019; Gioia et al., 2002; Hartmann & Weiss, 2017; Livingston, 2016; Maitlis & Christianson, 2014; Maitlis et al., 2013; Sandberg & Tsoukas, 2015, 2020; Weick, 1988; Weick et al., 2005). Narrative is briefly discussed in the context of methodology in Chapter 3, and as a response to schism in Chapter 5. A short discussion on the broadening applications of sensemaking is included in this literature review because of its import for understanding participant responses in schism.

Sensemaking is readily applicable to schism research because assumptions about the nature of contexts within which people engage in sensemaking align with participant lived experiences of schism. "Sensemaking is the process through which people work to understand issues or events that are novel, ambiguous, confusing, or in some other way violate expectations" (Maitlis & Christianson, 2014, p. 57). All participants in the study described processes of sensing, intuiting, rationalising, justifying, and making sense of their schism experience.

Karl Weick (1988, 2012; Weick et al., 2005) is acknowledged as advancing the concept of sensemaking, often studied in the context of crisis decision making. Interest in sensemaking has flourished in the last two decades. Weick's conceptualisation has been considered by some to be focused on cognitive processes, which lead to articulation of a plausible story and action. The cognitive focus has been expanded to other modes of sensemaking, including emotional and shared sensemaking (Hartmann & Weiss, 2017; Maitlis et al., 2013), embodied narrative sensemaking (Cunliffe & Coupland, 2012; De Rond et al., 2019), retrospective sensemaking (Gioia et al., 2002), and sensegiving (Gilstrap et al., 2015). For reviews, see Maitlis and Christianson (2014) and Sandberg and Tsoukas (2015).

Maitlis et al. (2013) developed a process model of sensemaking, integrating the role of emotion, arguing "sensemaking is an effortful, sometimes difficult, and potentially unpleasant process, and so individuals must be energized to engage in it" (p. 226). Further, that psychological safety and shame played a role in whether sensemaking was a shared or solitary process, and that a conscious sensemaking process concluded only when emotions were congruent with the decided

orientation to action. Hartmann and Weiss (2017) explored the role of short-lived emotions and diffuse moods in sensemaking and found participants used emotional language, and that emotions naturally played a role in how realities were articulated and made real. Sensemaking, they observed, had a social and relational nature, and understanding others' affect was important for empathy and building shared realities.

Cunliffe and Coupland (2012) posited the concept *embodied narrative sensemaking*, arguing "we make intuitive choices based on bodily responses, which we understand through sense impressions, gestures, expressions and emotions" (p. 77). Making sense involved a plausible narrative, projected into the future, created by asking not only "What's the story?" but also "How do I fit into the story?" Sensemaking, they conclude, is "inescapably embodied and entwined with identity" (p. 83). In a case study of rowing the Amazon, De Rond et al. (2019) explored embodied sensemaking from the perspective of "the body as sentient, sedimented, situated, and capable of suffering" (p. 1961).

Sensemaking is an activity where actors make plausible sense, retrospectively, about events that have occurred that, when articulated, lead to action (Weick et al., 2005). Retrospective sensemaking has a further connotation, which is the iterative adjustment of how past reality is or was understood. "Meanings of past events and past ways of seeing are inevitably vulnerable to interpretation and reinterpretation in light of current outlook" (Gioia et al., 2002, p. 622). Power relations are implicated in sensemaking, for example, by affecting what criteria are permitted for constructing and expressing a plausible story (Cunliffe & Coupland, 2012). *Sensegiving*, making sense for others, is imbued with concepts of power, and is researched as a role of leaders including in crisis situations (Gilstrap et al., 2015; Livingston, 2016).

A variety of literatures, beside identity, power, and sensemaking, informed the current research, especially those exploring holistic human responses in situations where reality is not ordered and predictable, and where people act both individually and in relationship with others. Previous grounding in leadership and management was called upon, and exploratory forays were

made into, for example, stigma (Devers et al., 2009; Paetzold et al., 2008), complexity (Uhl-Bien et al., 2007), paradox (Fairhurst et al., 2016; Putnam et al., 2016), performativity (Gond et al., 2016), metaphor (Cornelissen & Kafouros, 2008a; Morgan, 1997), sociology (Cooney, 2007; Fligstein, 2001), collective behaviour (Goode, 1992), conflict and conflict resolution (De Dreu, 2010), crisis and crisis management (Holsti, 1979; Mumford et al., 2007; Pearson & Clair, 1998), change management, and group development (Smith & Berg, 1987; Worchel et al., 1991). References to these topics are made in the body of the thesis where they are relevant to discussion.

Schism is a complex social process and intersects with numerous other concepts. Making connections to other literatures—identity, power, sensemaking, and others—provides an opportunity to augment the limited theoretical knowledge pertaining directly to schism, and may situate schism as a phenomenon of theoretical significance to researchers in other fields.

Limitations and Problematisation of Schism Literature

The impetus for doing this research was to explore people's lived experience of schism, to see whether new insights might help people navigate schism especially once they found themselves embroiled. A review of the literature was a preliminary step in the investigation. The expectation was that a suitable frame would be found to situate the project. It became apparent during this review, however, that schism literature lacks coherence and a foundational theory on which to build new knowledge. This section summarises the limitations identified, and problems encountered, which are interconnected and partly overlapping.

Scarce Data. While authors consistently reference each other, all remark on the paucity of empirical and theoretical work, including in relatively more recent publications (e.g., Wagoner et al., 2019). Case studies appear to be rare (Gorup & Podjed, 2015; Sani, 2008), theories underdeveloped (Balsler, 1997), and there is limited quantitative work. It is difficult to build a theoretical base without enough research, especially when the research that does exist is spread over decades and disciplines.

Nature of Schism as a Unique Phenomenon. Schism is not clearly defined, not established as a unique phenomenon, and not situated with respect to other related phenomena, processes, or concepts. This is despite clear relevance and the possibility that adjacent literatures, such as group development, or crisis, change, and conflict management, have a lot to offer the modest collection of schism literature. It is difficult to define what schism is not, or what it has in common with other phenomena, if there is no agreed conceptual understanding of what schism is. This lack of clarity is possibly a consequence of (and an impediment to) there being no established body of schism literature. The lack of a sophisticated conceptualisation of the nature of schism emerged as a critical limitation in the literature.

Shared Language and Debate. The lack of shared language in the literature is notable. It is surprising there is a lack of contention over language or definitions, since it is greatly needed. “The meaning of words is relationally constituted” (Haugaard, 2020, p. 7). The lack of a community of researchers debating and sharing theory reflects the apparently stalled state of research on this topic and inhibits the development of knowledge about schism. Absence of a lexicon also makes it more difficult to situate schism in a broader context and leverage other connected literatures. Schism has been almost completely neglected in leadership and management literature, which has a flow-on effect to policy and practice.

Integration of Existing Models or Dominance of One. Of the six core models identified, none is seminal. All have strengths and uses, but no single model has been identified as directly applicable across multiple contexts or is universally well accepted. None of these models have been extensively cited or tested. Neither do the models readily integrate, despite commonalities. They are based on different theoretical frameworks, have different purposes, and use different terminology. No generalisable theory of schism was found in the literature.

Criticism of Linear Group Process Conceptualisation of Schism. Testing and criticism of existing models is largely absent, reflecting the lack of debate about the nature of schism. In particular, the concept of schism as a linear group process appears to have been adopted largely

intuitively (Balser, 1997; Zald & Ash, 1966) or inductively in a specific context (Dyck & Starke, 1999), and has not been challenged. A linear process model is overall a poor fit for case study literature (Boulding, 1969; Hobbs, 2011; Kalifon, 1991). Within a circumscribed context, details may align, and models may be developed, but other theoretical research and case studies provide clear contradictions. Increasing the number of variables precludes an elegant fit, and defeats one basic purpose of a theory: to simplify reality without excessive distortion or reductionism. It seems a linear process model cannot match the requisite level of complexity to represent schism.

Level of Analysis, Entity of Concern. The six core theoretical models focus on the organisation or social system as the entity of concern, and the lived experience is largely lost as the data is abstracted to theory. Abstraction is not unexpected or unreasonable in theory development. However, the assumption that schism is a phenomenon of groups, organisations, or societies—rather than a human experience—has directed attention away from a critical commonality between contexts: how people feel, think, and respond in schism. Scope for applying a lived experience lens in schism research was identified.

Overfocus on Discrete Causes. Despite attention paid to what “causes” schism and what contextual factors and events are “associated with” schism, few strong correlations have been identified, and causation has not been demonstrated. Further, no satisfactory explanations have been suggested for why schism follows sometimes, and not others, when certain contextual factors or events are present. Scope existed for expanding the search for associative and causative links, and mechanisms of schism construction, beyond contextual or single-event, temporally linear causation.

Normative Assumptions, Stigma. The assumption of the organisation as the entity of concern imposes a normatively negative view of schism, despite research promoting its (normatively positive) transformative potential (Gorup & Podjed, 2015). There appeared to be scope to explore the stigmatising effects of imposing such a duality. This relates to the previously mentioned overfocus on identifying causes of schism, presumably linked to the assumption schism is to be avoided whenever possible. Dart (2004) argued nonprofit organisations are compelled to respond to

normative expectations of what constitutes a proper organisation, and case studies support this claim. Conflict is not considered proper, especially schism. Pondy (1967, 1992) reflected ironically on his mindset at the time of publishing his seminal conflict model—but these attitudes remain.

With proper care, the worst conflicts could be avoided by proper organization design, or by proper training of members to hold similar perceptions and goals or... be prevented from escalating... by skilful use of conflict resolution techniques.... The use of raw power or of violence... played little or no role.... not within those islands of sanity and purposiveness called formal organizations. (Pondy, 1992, p. 257)

Allyn (2011) expressed perfectly what seems to be a significant real-life problem, and one which could be addressed through schism research which imposes no normative judgment.

Whether we like it or not, mission-driven cultures are inherently conflictual. It is important that we recognize this fact because, in the nonprofit sector especially, conflict is unexpected and therefore feared: idealistic stakeholders working together toward a common aim are not “supposed” to disagree. Rather, they are “supposed” to get along happily and harmoniously. When conflict in nonprofit organizations does arise, it is usually taken as a sign of trouble. This false ideology about the nature of conflict in the nonprofit sector needs to be dismantled because it only exacerbates the problem. Disagreement needs to be understood as an inherent dynamic of the sector. Disagreement is not a sign that something is “wrong,” it is a sign that the sector is working as it should be. (p. 768)

In summary, schism literature is scant, spread over multiple fields, and lacks shared language and well-developed theoretical concepts. There is little debate about the nature of schism, the focus of schism research, or assumptions underpinning current models such as linearity, the entity of concern, or normativity. No generalisable definition or theory was found in the literature searched. These limitations in the schism literature informed the research questions elaborated in Chapter 3.

Chapter 3 Research Design

The researcher... often ends up by casting off preconceived notions and theories. Such activity is quite simply a central element in learning and in the achievement of new insight. (Flyvbjerg, 2006, pp. 236–237)

This chapter begins with an overview of the research project's evolution, followed by sections elaborating the research questions, philosophical foundation of the research, research design, nonprofit context, data collection and analysis, and development of theory. The lived experience of doing the research was not so ordered. Facets of the research wound together frustratingly, chaotically, and finally synergistically to form a coherent narrative.

An Emerging Research Project

Phase 1 Conception. Personal experience of schism prompted an interest in how to cope with failing group processes, escalating hostility and oppositional behaviour, breakdown of community and organisational function, and legitimacy risk, while also managing personal distress. Anecdotally, this seemed a common experience for people in small nonprofit organisations. The decision was made to research schism in this context, from a human experience perspective, with the goal of gaining insight into how to lead more effectively and compassionately during schism.

Phase 2 Literature Search and Research Design. Discussion with potential participants and peak body representatives indicated appetite for practical research related to schism. As detailed in Chapter 2, a search of literature showed schism research to be sparse overall, and exposed a methodological gap in researching schism from a lived experience perspective. Existing theoretical concepts did not provide a strong grounding for the project. The dominant linear process view of schism was adopted as a starting point, with the intention of interrogating the data to address gaps and inconsistencies.

A qualitative research design was developed, acknowledging participants as knowledgeable and insightful. Research questions were posited from an interpretivist perspective. This exploratory

approach aligned with the need for theory development rather than theory testing. Human research ethics approval was sought and approved on the condition current schisms would not be the subject of interviews. The intent was to interview multiple members of opposing groups, since different perspectives could reasonably be expected to yield different versions of “objective” reality. A change to recruiting strategy became necessary almost immediately, since obtaining whole-group agreement to participate, and contacting people who had left an organisation as a result of a schism, proved difficult in practice.

Phase 3 Data Collection and Analysis. Recruitment efforts were refocused on individuals who had experienced schism, people considered expert in group conflict resolution, and members of peak bodies with experience in helping groups in schism. A variety of perspectives was still possible over the range of contexts, and since the purpose of the research was not to determine objectively what happened, rather to understand the experience from the participant’s perspective, no significant change to the research aims or questions was required. Once interviews began, referrals aided recruitment; experiences of schism were common.

Semi-structured interviews were undertaken, with questions tailored to each participant. Questions evolved as saturation was reached for some concepts and new themes emerged. A narrative form of retelling was strikingly common. This prompted literature investigation into narratives as data, and adjustments were made to interview style.

Data analysis occurred simultaneously and iteratively with data collection. Analysis involved transcribing and immersing in each interview; developing coding schema emerging from data (bottom-up) and a priori (top-down); exploring emerging themes; and persevering with trying to faithfully represent data in ways which respected literature process models.

Phase 4 Definition and Theory Development. Frustration with capturing the essence of the lived experience as described by participants, and with clarifying a definition of schism, forced problematisation of the linear process model itself. Priorities of the project were reconsidered in this light. Emerging themes which challenged a priori assumptions were especially noted. This shift in

perspective allowed a novel representation of schism to coalesce. A model was developed which better fit the current research data, while retaining coherence with existing knowledge.

The original goal of studying the lived experience of schism for its intrinsic value was ceded as it became clear the most valuable contribution would be to articulate a theoretical understanding of schism, based on insights made available through participant narratives. The aim of conveying the lived experience of schism as authentically as possible was retained.

The findings of the research put forward in this thesis are a proposed new definition of schism and a lived experience theory of schism. Every effort has been made to develop a theoretically rigorous but actionable theory, to help actors orient themselves in schismatic conflict and—through new knowledge—improve agency and control over the incidence, progression, and lived experience of schism. The findings remain true to the original goal of helping people navigate schism more effectively and compassionately.

Research Questions

Acknowledging roots in personal lived experience, research began with an overarching interpretivist question:

OQ How do people understand and express their experience of schism?

Four emerging questions became salient as engagement with the literature, data collection and analysis, and theory development progressed, and remained an anchor throughout the research process, along with the original overarching question (see Figure 1):

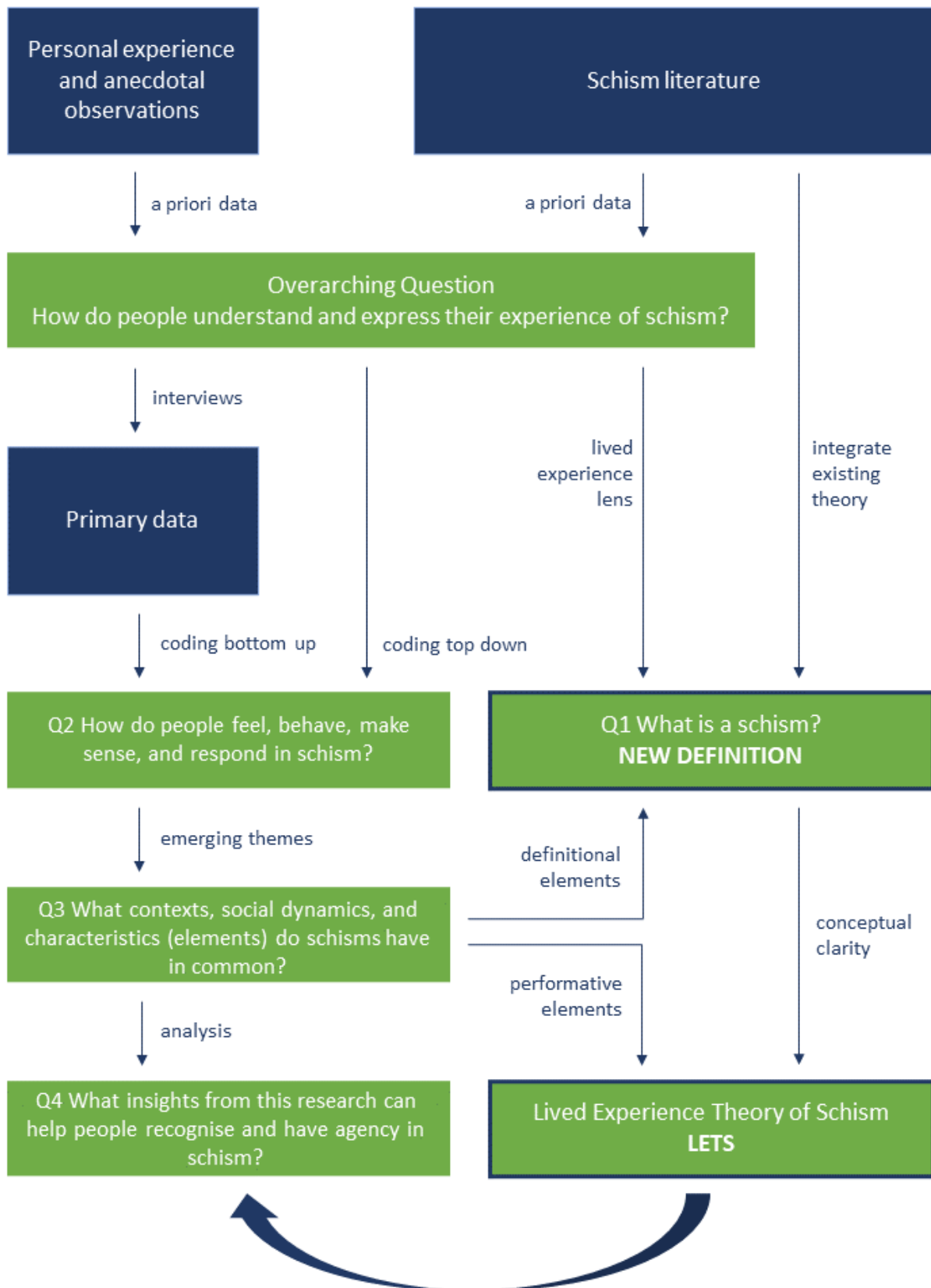
Q1 What is a schism?

Q2 How do people feel, behave, make sense, and respond in schism?

Q3 What contexts, social dynamics, and characteristics (elements) do schisms have in common?

Q4 What insights from this research can help people recognise and have agency in schism?

Figure 1 Research Questions in Context of Project



Role of the Researcher

The active involvement of the researcher in qualitative (and quantitative) research is no longer a matter of debate. The role of the researcher must be understood and acknowledged but it does not make the research any less robust by its existence or by its influence. Indeed, without the researcher, each story remains personal and particular. The role of the researcher is to do the unique and powerful human work of observing—with purpose—and constructing knowledge from what is “seen.” Cognitive limits and existing frameworks, and the relationship of the researcher with each participant, affect which voices are heard most clearly, how they are interpreted, what patterns are intuited, and how insights are communicated.

The interpretivist philosophy asks the researcher to look at data without preconceptions. This vantage point is not a passive place of equilibrium. It requires conscious and subconscious to act as if blank when they most certainly are not. Mindful effort is required to create a series of moments which approximate such a state, and take advantage of those moments to look and to listen. All that can be done is—with self-knowledge—cycle between data, patterns, inferences, concepts, and existing knowledge, and then find the courage to throw it all out and do it all again, from a different viewpoint, using different assumptions and different logic, and hearing different guiding voices.

The complexity and richness of the collected data meant no treatment could ever be objective or exhaustive. Decisions had to be made, especially what—of everything that was learned—was most important to write about in this thesis. The proposed new definition and lived experience theory of schism were chosen because they provide a foundation for understanding and communicating about everything else.

Philosophical Foundation

The classification of scientific paradigms is not an objective truth; paradigms are interpreted and evolve like all other concepts and tools. They serve a useful purpose: to codify and communicate a coherent set of beliefs about the world, which may underpin a research project. Burrell and

Morgan (1979) named interpretivism as a research paradigm which favours a view of reality as subjective, socially constructed, and interpreted by individuals, and of society as tending to unity and cohesion (Goles & Hirschheim, 2000). Interpretivist studies see organisations as social communities rather than economic entities, and participants as active sensemakers with the researcher in representing their reality and understanding how this reality is constructed and maintained (Deetz, 1996). Pertinent for a study of schism, Deetz (1996) suggested “researchers doing interpretive work have begun to question the logic of displaying a consensual unified culture and have attended more to its fragmentation, tensions, and processes of conflict suppression” (p. 202).

Creswell (2013) notes the common combination of interpretivism and social constructivism by qualitative researchers, since they share the basic goal of relying “as much as possible on the participants’ views of the situation being studied” to inductively develop theory (p. 8). This research project has been designed and carried out using such a combination of worldviews.

Social constructivism is theorised by Berger and Luckmann (1966) in *The Social Construction of Reality*. For those ascribing to this worldview, reality is not objective truth, rather it is constructed in sociohistorical context by people, through their experiences, relationships, and language. A priority in interpreting participant narratives was to immerse in and seek to understand the participant’s reality, accepting this as the truth of their lived experience. In schism, knowledge, truth, and reality are subjective, multiple, and contested. Opposing factions inhabit far different realities.

Social constructivism was especially suited to a study of schism because it explicates processes of objectification, reification, and legitimation. Language is ambiguous, constructive of reality, and a primary tool of meaning making and socialisation (Berger & Luckmann, 1966). Participants and researcher, through language, shape the reality they wish to communicate.

Social constructivism provided a framework for understanding why incidence of schism seemed inevitable within all types of social systems.

With the establishment of subuniverses of meaning a variety of perspectives on the total society emerges.... It goes without saying that this multiplication of

perspectives greatly increases the problem of establishing a stable symbolic canopy for the entire society. (Berger & Luckmann, 1966, p. 80)

The social constructivist framework readily accommodated three strongly emerging themes of the research. First, power contests and the machineries of universe-maintenance; second, the role of group leadership capacity in maintaining a stable symbolic canopy; and third, recognition that schism does not remain ideological, and it does not happen to organisations, rather it is embodied: human beings construct and experience schismatic conflict.

Reality is socially defined. But the definitions are always embodied, that is, concrete individuals and groups of individuals serve as definers of reality. To understand the state of the socially constructed universe at any given time, or its change over time, one must understand the social organization that permits the definers to do their defining.... From the abstract “What?” to the sociologically concrete “Says who?” (Berger & Luckmann, 1966, p. 107)

Use of a lived experience lens originated in a desire to better understand a personal experience of schism. The focus of the research was participant experiences and how people constructed, responded to, and understood their experiences. The use of this lens rested on the premise that knowledge of reality comes from experience, so researchers should study—not events—but people’s experience of events (Neesham, 2017). This was distinct from schism research encountered in the literature, which tended to focus on associations between schism and clear events (Gioia et al., 2012). Insights into the lived experience of schism had intrinsic value, but ultimately enabled original theory development. Theory as an end point was appropriate for the under-theorised state of the literature, and fit comfortably with the choice of qualitative research, interpretivist and social constructivist paradigms, and a lived experience lens.

A more sophisticated understanding of power developed over the period of the project (Clegg, 1989; Clegg et al., 2006; Fleming & Spicer, 2014; Foucault, 1977; Haugaard, 2020; McHoul &

Grace, 1993). As these writings became more accessible, power began to play a greater role in the methodological approach to data analysis. Less focus was placed on what power *is* and more on what power *does*, and how roles, relations, structure, and legitimacy were constituted. “For Foucault, ‘knowledge’ is much more a matter of the social, historical and political conditions under which, for example, statements come to count as true or false” (McHoul & Grace, 1993, p. 29). Recognising power in the day-to-day constituting of reality, and at the same time noting long-term effects of the exercise of power, was fundamental to data analysis and theory development.

Ethical Considerations

Human research ethics approval was sought, and granted subject to conditions (see Appendix A, Figure A1 and Figure A2). Standard conditions of approval had minimal impact on research design. Informed consent was received from all participants (see Appendix A, Figure A3 and Figure A4). All participants were over 18 years of age. Privacy laws were complied with. Data was stored according to Murdoch University guidelines for the safe management of data. People approached to participate were members of organisations where the researcher was not currently involved. Findings will be published and/or presented in a form suitable for participant audiences so they, and their organisations, may benefit from their participation.

Respect and care for participants was part of research design. Guidance from the Human Research Ethics Committee about the consequence of the researcher–participant relationship was valued (Ellis, 1995). Personal experience of schism enabled a natural empathy. At the same time, while guiding participants through the recruitment and interview process, self-awareness was required to avoid projection and approach each person as an individual with their own concerns.

Certain ethical considerations, and conditions and recommendations from the Human Research Ethics Committee, did impact sampling, interviews, and the way data was presented in the thesis. Some challenges were anticipated and planned for, and other limitations emerged at later stages of the research. The most significant considerations are discussed here.

Deidentification. Participants and organisations were deidentified to protect them from personal, professional, or reputational fallout as a result of sharing their stories. Participants were able to retract comments made in interview, at their request. Occasionally during an interview, requests for discretion, *off the record*, and to take care with framing a story were made. *I'm worried, my only concern is how this will be represented in what you write.... I would be as respectful as I could (Adam)*. No participant retrospectively withdrew a comment or story.

Aggregating data into a generalised narrative was a planned layer of deidentification. When it came time to do this, this method did not preserve the unique and compelling nature of each story. Participant experiences could not be authentically portrayed without preserving cultural and historical embeddedness, and minutiae of characters, language, and events. These details made stories real and interesting, and revealed how perplexing situations might develop. Indeed, the fact every schism was different added rigour to the research design. Aggregation obscured differences critical to theory development and testing. Quotes have been used in place of aggregated narratives and, where longer extracts are included, particular care has been taken with deidentification.

Trust and the Participant Experience. Active listening skills supported interviewees to tell their own story in a way they felt comfortable, and validated their lived experience. Responses were uniformly positive about the experience of storytelling, and participants reported feeling *believed* and *understood*, sometimes for the *first time*, *affirmed*, and *not so alone*. *I would not want to recount any of this to anyone else... because [they]... just wouldn't believe it (Deborah)*.

Emails were sent after interviews to check on participant well-being. *I found it therapeutic talking about it yesterday and helped to remind me that the negatives are in the past, but the valuable lessons will remain with me (Cam)*. Positive experiences of recounting traumatic events have been reported in the literature. "The act of story telling in the presence of an interested and empathetic listener tends to have... a restorative effect" (Powley & Cameron, 2006, p. 19).

Responses were not unexpected, therefore, but they were also not taken for granted, and every care

was taken to make the experience a positive one for each participant. Contingency processes were in place, in case any participant struggled with emotions or memories, but these were not needed.

Willingness to trust the interviewer and the research process was crucial since participation, and the separate step of disclosure, was voluntary. Convenience and snowball sampling meant a basic level of trust was already present in many cases. Communicating with participants about needs and fears before the interview aided in putting them at ease. Almost all participants began with a description of what happened, and deeper reflections were able to be elicited in the second part of the interview. *You got more out of me... I'm funny about [talking about it]—I don't live that story daily, I really don't (Adam)*. Trust levels were high, especially considering time restraints. The participant experience was an important ethical consideration of the research.

Two Sides to Every Story. An early change to recruitment strategy occurred because consensus group participation proved too difficult to arrange. The focus of recruitment then shifted to individuals. This change to recruitment highlighted a perceived problem of how to hear both sides of the story. This problem had two aspects, one technical, one human.

Typically, snowball recruitment was by referral through a trusted third party, and contact with the researcher was initiated by the participant if they chose to be involved. It was awkward to contact people who had left an organisation after a schism. The involvement of boundary spanners was considered, people who maintained relationships within both factions. One such person was tentatively approached, but they displayed discomfort at being put in an *awkward situation (Felicity)*, and the avenue was closed. Direct contact could have been made when contact details were in the public domain, but that precluded introduction by a third party. The human aspect to this problem was the presumption that a participant who had been metaphorically tracked down to tell “the other side of the story” may feel a low level of trust. In one case, both sides of the story were represented, as neither participant had exited, and both were referred by a mutual friend only tangentially connected to the organisation, and not at all involved in the schism.

It emerged that the perceived problem of not being able to hear both sides of the story had minimal negative effect, and may have been fortuitous in prompting a mental shift early in the research process. First, the research goal was to understand the experience as perceived by the participant, not to judge objective truth; this notion was naïve at best. “It may be neither possible nor desirable to use an interview to get to the ‘truth’ of what happened” (Bridges & Nicholson, 2008, p. 221). In the end, stories were heard from insurrectionist and group leader, victor and vanquished, just not in the same schism. Second, most existing schism research focuses on the organisation or social system as the entity of interest, and the shift in recruiting strategy placed the current research more surely in the methodological gap in the literature: exploring schism from a human viewpoint.

Overall, ethical considerations did not unduly hinder the research in most respects and may have improved research design. Most importantly, they enhanced care of participants. One constraint of the Human Research Ethics Committee—that recruitment was only permitted for past and not current schisms—did affect data collection, and this is discussed in the next section.

Robustness of Research Design

Time. There were stark differences between interviews with people relating recent versus historical schism experiences. The requirement not to interview people in a current schism was well justified on the grounds of not upsetting people. Avoiding current conflicts also protected organisations from the kind of unwitting external-validation triggers Dyck and Starke (1999) identified. Some challenges arose as a result of the restriction, however, and are discussed below.

First, defining “past” was not as simple as it sounded. *It’s been two or three years now, it just goes on and on (Hettie)*. Participants made contact to update their story after a schism rekindled:

They sent Hettie another one of these trumped up expel notices.... I said, “This is bullying. Leave the poor lady alone.... She’s 84 years old. Legally blind, just lost her husband, and they’re bloody sending her letters like this!”.... That really made my blood boil.... It just was not fair. (Ken)

Second, people talked about current schisms anyway, despite prior agreement not to. At times people began by speaking about past schisms then started to draw parallels with something currently happening. To comply with ethical boundaries, this situation was managed by redirecting carefully and with due respect for the interviewee. Further, that section of the interview was treated similarly to when a participant indicated they had over-shared: remarks from that section were not quoted in the thesis. An immediate redirect was not always possible or compassionate, especially as participants tended to get more emotional when talking about the present—unresolved—conflict.

The observation of heightened emotion when the conflict was more recent links to the third challenge. People were more disoriented, emotional, vulnerable, and uncertain of their allies, role, and future course of action when talking about schisms they were currently experiencing, than when they were narrating a past lived experience of schism.

In tellings, events are selected and then given cohesion, meaning and direction; they are made to flow and are given a sense of linearity and even inevitability.... The mind is put to rest by the illusion of sequence and order, the appearance of causality and the look of necessity. (Sandelowski, 1991, p. 163)

It was after interviews were completed and data analysis was underway, that the implications of the retrospective nature of the data were fully considered. Unique insights may be possible if future research can access in-the-moment emotions, embodiment, and sensemaking. This research would require approval from the Human Research Ethics Committee not granted for this project. The case put to the Committee would be strengthened by evidence from the current research that the experience of participating was positive. The risk versus benefit profile would also be more favourable because sharing the findings of the current research would bolster the potential for participant benefit, compared with before this research was undertaken.

Willingness to Discuss. In another sampling foible, it is likely people who volunteered to be interviewed are a subset of people who have experienced schism: those who believe they were on the right side and did the right thing. Only one of the 41 participants expressed even a modicum of

regret at being pulled into what they described as the *dark side* of the schism: people's anger, toxic gossip, and destructive behaviours. This statistical anomaly could be explained by the observation that members of both factions saw themselves as belonging to the right and good faction. But there also could be people who later realised they were at least partially misguided, blinded, lost perspective, taken in, or used. This experience has not been properly captured in the sampling.

“The respondent sample... is biased in favor of those willing to discuss” (Powley & Cameron, 2006, p. 19). Participants had to be willing to share their role in the schism, which takes a certain courage and a degree of having reconciled the experience. It is likely there were people who were deeply hurt or betrayed, did not want to bring up painful memories, regretted or were even ashamed of the part they played, who would not want to be interviewed. Alternately, some people may not have felt affected by the schism experience much at all, in which case they may not have any interest in participating. This sampling effect does not negate the value of the findings as theoretical, not representative, sampling is most appropriate for exploratory research on a phenomenon of interest. It does, however, point to an avenue of future research.

Theoretical Sampling. A wide variety of cases contributed to the robusticity of findings (Eisenhardt & Ott, 2018). For three of the schisms studied, multiple members of the same faction were interviewed. These interviews returned unique insights, especially about individual versus shared sensemaking. A small number of interviewees spoke about helping other people who were experiencing schism. The outsider viewpoint provided insight about normativity and stigma and highlighted the vast gulf between observing and experiencing. This in turn underlined the value of a lived experience lens as a novel methodological approach. Several formal leaders were the targets of undermining (or valid criticism, depending on perspective). Some participants were not in positions of formal power but nevertheless played a role in group leadership. Some were successful in their goal, others not. Some were satisfied, retrospectively, with the outcomes—others were devastated. A wide range of circumstances, roles, and experiences were represented in the data.

Existing models in literature have been built on a small number of cases or cases which are highly similar. Naturally, conclusions are context specific and, logically, this has resulted in contradictions between models. The variety of cases in this study was advantageous for probing these contradictions. In multiple case study analysis, rather than representative sampling, “cases are chosen for theoretical reasons such as replication, extension of theory, contrary replication, and elimination of alternative explanations” (Eisenhardt & Graebner, 2007, p. 27). Variety was suitable for theory development in an under-theorised field. In practical terms, it increased opportunities for both pattern recognition and contraindication, demanded rigorous attention to detail, and when new questions emerged later in the research process, a cross section of data was readily available.

Leader Perspective. The sample set comprised a significant number of school principals, chief executive officers (CEOs), board chairs, governing body members, peak body representatives, and professionals in conflict resolution. This concentration of formal authority and professionalism in the participant sample created a leader and leadership emphasis in the data. Even an interview with a leader in an informal role was focused on how she created and maintained shared purpose and harmony within a coalition of entities involved in a coordinated action. While the formal leader focus was not unexpected, this selection of respondents accentuated viewpoints such as maintaining group unity and averting incidence of schism. Further, participants in positions of formal authority perceived different legitimacy restraints and resources of power than those without formal authority. Leader-centric perspectives had counterparts in the data, but were overrepresented, so this predominance was consciously monitored during data analysis.

Control Context. How to compare experiences of people in organisations that schism and do not schism is a methodological puzzle. Dyck and Starke (1999) and Balser (1997) commented on this particular difficulty with schism research. Leaders interviewed discussed proactive steps they took as a matter of course to avoid conflict and schism developing. In a complex system, it is difficult to say how effective each strategy was. “Full success at crisis management is, by definition, invisible” (Pearson & Clair, 1998, p. 67). It was possible, however, to approach questions such as whether and

why certain actions might escalate or de-escalate a schism. The comparison was possible because conditions in a social system were not restricted to “schism” or “not schism,” rather an enormous range of actions, responses, and states were observed. Consideration of this issue led to separation of schism into the three dimensions of incidence, progression (including outcomes), and lived experience. A schism or not schism duality focuses narrowly on incidence. While it is true comparisons can never be certain, this is true for many research contexts, especially where complexity exists.

Rationale for Nonprofit Context

Nonprofit organisations in Western Australia were chosen as the context for this research. The choice was made first for practical reasons. The researcher’s personal schism experiences were in nonprofit organisations and, anecdotally, other instances of schism would be readily found within the sector. Professional contacts in the sector enabled initial convenience sampling. It also made sense to compare with other people’s experience in similar organisations. *In a volunteer organisation, you’ve got a different kind of paradigm to a paid organisation (Matt)*. To extend sampling to the for-profit and government sectors would have introduced a whole other set of considerations. Testing the application of the current research in these sectors is another project altogether, as is the question of whether nonprofit organisations are more prone to schism than other types of organisations (which has been tangentially considered here). The nonprofit sector provided enough variability to enable theoretical sampling (Eisenhardt & Ott, 2018) while maintaining a manageable amount of variation in sources of conflict, organisational culture, governance structure, organisational objectives, and economic and legislative environment.

A personal commitment to nonprofit organising was a motivating factor for the choice of topic, and was the other main reason for choosing a nonprofit context for the research. The nonprofit sector is unique, valuable, and richly diverse. From universities, hospitals, and international charities to small, local community groups, nonprofit organisations are diverse in

membership, purpose, ethos, size, and structure. Data on registered charities is reported in Australia by the Australian Charities and Not-for-profits Commission (<https://www.acnc.gov.au>) but there are possibly ten times as many non-reporting nonprofit organisations (Productivity Commission, 2010). The sector has a relationship with people and human values worth nurturing (Eikenberry, 2009). This research recognises that nonprofit organisations have different philosophies, needs, resources, and capacities. Greater choice in what it looks like to be a legitimate organisation may ease isomorphic pressure to become more business-like (Dart, 2004; Maier et al., 2016), bolster claims to self-governance, and celebrate and leverage the strengths and uniqueness of the nonprofit identity.

Trust, cooperation, shared goals, identification with mission, valuing people and relationships, and self-governance are fundamental to many nonprofit organisations. Schism lived experiences can be exceptionally confronting for members of the nonprofit sector as these core principles are breached. Negative experiences can mean loss not just for the person and organisation but the sector as a community. A goal of this research was to empower nonprofit practitioners to increase agency and control over schism, not just the incidence of schism and outcomes for the organisation, but so members of the sector have better experiences.

The nonprofit sector is an important context in schism literature, supporting the anecdotal observation that schism is more common in this sector than in business or government. The difference is not unexpected, since nonprofit organisations routinely manage multiple competing goals and inbuilt tensions which can act as schism triggers (e.g., mission vs. money, multiple stakeholders, advocacy vs. funding-dependent service provision). Features inherent to nonprofit organising have been associated with schism, including decentralised power (Gamson, 1975), identifying with an organisation through ideology, mission, or simply membership (Sani, 2008), and loss of a founder (Balsler & Carmin, 2009; Potz, 2016). These nonprofit characteristics are assumed to be valued, and groups motivated to retain them, but there is also the assumption of legitimacy, material, and experiential reasons to avoid incidence of schism. Research challenging the presumption of a causative link between these organisational features and schism incidence, or

facilitating greater agency and control in episodes of schism, could be impactful in the nonprofit sector, if new theoretical knowledge can be translated into practice.

People work together in nonprofit organisations to identify and solve problems, meet needs in their community, have fun, or share an ideology. This includes arguing about who they are, what they should do, the best way to do it, how these things should be decided, and by whom. These questions are perpetually contested (Kreiner et al., 2015; Sani, 2005) and part of what makes nonprofit organisations the building blocks of a democratic society (Eikenberry, 2009). A core assumption of this research is that schism is sometimes inevitable, and better understanding might prevent it hurting too much (De Dreu, 2008). Contributing to knowledge of schism in nonprofit organisations seems a worthwhile endeavour.

Sampling

In this thesis, a *nonprofit organisation* is a self-governed organisation which operates to benefit members and/or the community and does not distribute profit. Participants in this research were members, volunteers, and staff members of nonprofit organisations in Western Australia, both in the capital city and a small regional city. Sampling within the Western Australian nonprofit sector provided ample scope while controlling extraneous factors related to the type of organisation and the geographical, economic, and State Government environment. The regulatory environment proved to be a factor in the research, since many organisations were adjusting to legislation affecting governance that had been introduced for all incorporated nonprofit organisations in Western Australia (*Associations Incorporation Act 2015*; Department of Commerce, 2015). This section describes relevant features of the sample space, and provides details of participants and the organisations where their schisms occurred.

Governance. All the organisations discussed by participants in this study were incorporated associations, which means they were self-governed, based on a legally registered constitution, and accountable for basic reporting of activities and finances to the State Government. In Western

Australia, most nonprofit organisations with significant stability (e.g., longevity, structured governance, financial assets) are incorporated, though many organisations exist that are not.

In this study, half of the organisations referred to by participants were governed and managed by volunteers serving on a governing body (*board* or *committee*), and are collectively referred to here as *volunteer-led* nonprofit organisations. They typically employed few or no paid staff, but at least one paid an office administrator and one contracted with a club coach. They tended to be the smaller, member-benefit organisations and clubs. The other organisations employed a principal or CEO overseen by a governing body (*board*, *committee*, or *council*). Other employees were appointed by the principal or CEO, and these organisations may also employ the services of volunteers. These were the schools, social service organisations, and peak bodies. Governing body positions in nonprofit organisations in Western Australia are typically voluntary.

Legally, governing body members in Western Australia must be adults who are members of the association. They are typically elected, by members, at the Annual General Meeting (AGM). There is usually a constitutional provision for co-opting new board members during the year, with voting by existing members of the governing body. In most of the larger organisations in the study, board members were also recruited from what was perceived as outside the organisation: to obtain expertise in business, finance, marketing, and law, perceived as not available within existing membership boundaries; or to gain a perspective seen as objective or without a conflict of interest. The legal requirement is fulfilled by formally becoming a member of the association. Clubs that exist to organise activities for children under 18, such as junior sporting clubs, used a similar workaround but for a different reason. They do not have adult playing members, so parents of junior players may become formal members of the club for the sole purpose of serving on the governing body.

Size. The original intent was to recruit members of small nonprofit organisations, but defining “small” proved problematic, and size was removed as a condition of sampling. Measures evaluated for defining size were multiple, including financial, geographical distribution, number of members or staff, and impact and reach. Some organisations represented in this study were small by

any objective measure. Others were chapters of larger organisations. Some had small numbers of staff and volunteers but high annual income and expenditure, and vice versa. Size of membership proved not to be a suitable measure because the understanding of membership was subjective, context specific, and dynamic. It was also noted that, regardless of the size of the whole organisation, the schism could be confined to a subset of people, making the total size of the organisation a minor consideration in the social dynamics being explored. Furthermore, during interviews, participants may have begun speaking about a particular schism but go on to talk about a schism in another, larger, organisation, which nevertheless provided relevant insight.

The decision was made that it was impractical and served no good purpose to restrict sampling by organisational size. Indeed, attempting to define the size of an organisation was the first insight into the socially constructed and dynamic nature of boundaries and membership, which later informed theory development.

Geographical Boundaries. To contain sampling to Western Australia was also not clear cut, with some groups being chapters of national or global organisations. Some participants discussed schisms they had experienced in other contexts (Australia and overseas). At the time of the interviews, however, all participants were members of nonprofit organisations incorporated in Western Australia, either in the Perth metropolitan area or in a regional city. There was one exception: a person who formerly worked in nonprofit organisations, who now served the sector as a professional conflict negotiator.

Sampling and Recruitment. Theoretical sampling was at first by convenience, using primary and secondary contacts in the nonprofit sector. Recruitment was facilitated with the aid of peak bodies for independent schools and social service nonprofit organisations via a meeting presentation (see Appendix A, Figure A5) and newsletter advertisement (see Appendix A, Figure A6). Once interviewing began, purposive snowball sampling aided in accessing multiple views from a single schism, participants from other organisations who had experienced schism, and people whose responsibilities included helping groups with leadership, governance, and conflict resolution. Overall,

and especially as more interviews were completed and new themes arose, participants were chosen who provided comparisons or a focus on a phenomenon of interest (Eisenhardt & Ott, 2018).

Participants and Organisations. The research sample set comprised 41 participants, whose narratives involved 24 organisations where schism occurred. Table 3 and Table 4 present demographic information about interviewees and the organisations they primarily spoke about.

Table 3 Participants

Gender		Stage of Life		Role During Schism		Group Leadership Role	
Female	20	Studying	1	Paid	19	CEO or Principal	10
Male	21	Working	30	Volunteer	22	Management Committee	17
		Retired	10			Employee or Volunteer	10
						Peak Body, Conflict Support	4
Total	41		41		41		41

Table 4 Organisations

Purpose of Organisation	Governance and Management Structure
Primary School Education	4 Principal and Board or Council
Social Services	7 CEO and Board
Support Groups	2 Board or Committee
Community Service and Member Benefit	5 Board or Committee
Sport and Leisure	5 Board or Committee
Activist Coalition	1 Flat structure, multiple organisations, unofficial leader
Total	24

Participants were given a pseudonym, and organisations a label. Four clusters of interviewees recur often in data chapters, and are introduced in Table 5. Other participants are introduced as needed in text. A full list of participants and their pseudonyms is in Appendix B.

Table 5 Clusters in Participant Interviews

Interview Cluster	Participant Pseudonym and Role	Introduction to Schism as Described by Participants
Small Schools Cluster	Anne, Adam, Brian, and Belinda (school principals) Carmen (sector advisory and advocacy role)	Four principals, from four small independent schools, each had a different schism experience. Carmen's viewpoint was the peak body for independent schools (small and large).
Sporting Club 1 Cluster	Cam (contracted coach) Dino (parent of player, nominated for president) Eli (parent of player, member of earlier management committee) Deborah (Cam's mum, long-time playing member) Finn (coached by Cam as junior, playing member) Glen (coach at another club)	Small sporting club. Exclusive coaching contract with Cam (industry standard practice) who was seen by participants as having built up the club over 10 years through junior coaching and competition. Some senior playing members. Current committee down to three members, proposed newcomer (also a coach) to stand for president and revitalise club. He and his wife given pseudonyms Daniel and Tammy Cooper . Cam felt threatened, gathered supporters. His belief was the Coopers were angling to take over his contract, and were not there for the good of the club. Research participants were all supporters of Cam.
Social Service Organisation 1 Cluster <i>Elizabeth's Story</i>	Elizabeth (CEO replacing founder) Harry (Human Resources Director) Felicity (Executive Assistant to Elizabeth, friends with COO) Gabrielle (external consultant) Isaac (Elizabeth's partner; primarily interviewed as CEO of a different organisation, see over) John (Elizabeth's mentor)	Community social service organisation, with outgoing founder. Elizabeth recruited as replacement and given task of professionalisation and growth of organisation. Schism 1: Existing COO expected appointment to CEO role. Led executive staff (all except Harry) in resisting Elizabeth's leadership. Schism 2: Faction on governing body resisted growth of organisation and new expectations of board members. Research participants were all supporters of Elizabeth. Felicity was a boundary spanner.
Volunteer Organisation 1 Cluster <i>Hettie's Story</i>	Hettie (central character, significant personal loss, well known in regional town for public-facing volunteer role in organisation) Ken and Ingrid (partners, friends of Hettie, volunteers)	Hettie, Ken, Ingrid, and nine other members signed a petition, after an AGM where no financial statements were presented, calling for a special general meeting to challenge the legitimacy of the committee. They were consequently expelled from the organisation, and they fought this expulsion over several years.

An important question during the project was whether each participant was relating a story about schism or about some other phenomenon. The schism definition in use was emerging for most of the project, and so this question was reconsidered periodically. Not all of the people interviewed were describing a lived experience of schism. Some were observing other people's experiences of conflict and schism (e.g., conflict experts, peak body representatives). A few participants related situations which had much in common with schism, especially aspects of the lived experience itself, but were eventually determined not to be schism (see Chapter 4). That these situations were, retrospectively, not considered schism did not make the experience less painful or the participant interview less valuable. In fact, they were invaluable because they provided perspectives and insights used to test ideas at the blurry and uncomfortable edge of "What is a schism?" rather than at the comfortable centre. Determining that a situation would be excluded as a case of schism did not mean excluding the narrator as a valued participant nor their narrative as valuable data.

Interviews

Before meeting in person, participants were sent an information letter (see Appendix A, Figure A3) and informed consent form (see Appendix A, Figure A4) and invited to ask questions about the process of the interview or any concerns, especially about confidentiality and deidentification. Before the official start of the interview, informed consent and permission to capture an audio recording of the interview were obtained.

The interview style was modelled on discovery interviews, as described by Bridges et al. (2008). Discovery interviews are a participant-centred method of gathering stories, which values listening and uses open questions, with supplementary probing when needed. The relationship between researcher and participant is one of listener and narrator, rather than interviewer and interviewee. Supplementary questions were pre-prepared, tailored to the participant's position, experience, and industry, or themes arising from previous interviews. The focus of the interview was

discovery, allowing for the participant to interrupt prior assumptions of the researcher, while still being supported in their retelling (Bridges & Nicholson, 2008).

Participants prepared themselves for the meeting in different ways, some by recalling details of a particular schism, others by immersing in memories of the experience—*I haven't had a migraine for about a year? And I had one on Friday night and I had one last night (Deborah)*. Some participants considered the research topic from an abstract perspective or simply showed up ready to chat. The interview typically began with an invitation to tell their story, and most people felt comfortable to begin that way. *So, I've set the scene, that we have the membership, the board, and a splinter group that had control of the majority of the finances (Neville)*. A few began with an overall sense of the experience. *Okay, well it was really HORRIBLE (Deborah)*. A small number preferred to answer direct questions. Participants were supported to share their story or knowledge in the way they felt comfortable. Some segued from topic to topic as ideas arose. Some related a single story with strong narrative structure including setting, characters, plot, conflict, climax, and resolution.

Each interview was conducted in response to the participant. Listening, responsive questions, and prepared questions were used when appropriate. Once the participant had told the story as they made sense of it, questions followed up on themes from the interview, especially if something they said was surprising or contradictory. Efforts were made, with sensitivity, to push past descriptions of what happened to memories of what they were thinking and how they were feeling at the time of the schism. If there was time, and the participant was willing, questions to explore research themes were then asked.

Interviews were typically 1 hour, and the time was monitored. The interview end was left to the discretion of the participant. A small number were between 30 and 40 minutes, because the participant felt they had finished telling their story. The longest was 2 hours with someone with a complicated story and an *elephant's memory (Cam)*. Care was taken to ensure the participant was not left in an emotional state. *That's been quite cathartic, talking about how dreadful they are for the last hour [laugh] (Elizabeth)*.

An email was sent in the following days, inviting participants to share further reflections that had come to mind since the interview. No one reported distress. Many reported a sense of relief: *It's actually really helpful speaking to you... because you validate a lot of my experience (Willow)*. Some participants added helpful depth to themes arising in the interview. Some suggested colleagues or friends to interview, and were asked to forward contact details and information about the research. Referral from an interviewee was the primary mechanism of snowball sampling.

Data Analysis

Data analysis occurred simultaneously and iteratively with data collection and generation of theory. Each process informed the other, from fine-tuning interview structure, to comparison of coded and whole-narrative data with concepts in development (Suddaby, 2006). Shifts of perspective were continual, between immersion in the lived experience of the participant in the role of empathetic listener, and abstracting to theory in the role of detached observer (Ellis, 1995). Another dimension of shifting viewpoints was monitoring the origin of ideas in aspects of self: the person re-living their own schism experience, the person empathising with participants on a human level, and the researcher with prior knowledge and a lot of questions working to keep an open mind. Conscious effort was necessary to allow ambiguity and complexity to exist, and to resist heuristic filtering and patterning and premature judgments and conclusions. Back-tracking was common.

Reflections following each interview were recorded and transcribed as analytic memos (Miles et al., 2014). Interviews were transcribed word for word, by the researcher. A gap of a week or more was kept between interview and transcription, as this was found to enable a fresh perspective on the interview and for new insights to arise during the transcription process. Further opportunities for immersion occurred during each round of coding, when comparing contexts and outcomes of different (but similar) schisms, and when writing chapters.

Coding schema included top-down, bottom-up, and integrated versions (Ryan & Bernard, 2003). The earliest versions used broad categories from existing literature to provide structure for

generating line-by-line coding categories. The richness of the data and the breadth of themes inherent in the research questions made pure bottom-up coding relatively unmanageable. Part of the appeal of using existing concepts for broad categories was to anchor data to an existing set of literature, especially because schism literature did not provide a strong conceptual framework. This connection to theory was important for testing emerging ideas, and having language to talk about them. The data chafed under this early structure however, and broad categories eventually emerged which better suited the lived experience data. The final coding schema is reproduced in Appendix C, Figure C1.

As data analysis progressed past an inflection point (see Chapter 4), exploration of emerging themes was done by combining existing codes rather than simple one-to-one sorting into categories. For example, it became apparent that metaphorical language of embodiment was an important way people understood and communicated about their lived experience. This was an unexpected finding, and did not have a unique code in the schema. When reviewing data that illustrated this theme, rather than recoding, a combination of codes from “language,” “sensemaking,” and “schism lived experience” categories were drawn upon (see Table 6).

Table 6 Code Combination for Use of Embodiment Metaphors for Sensemaking

Broad Category	Code	Description
Language	ALM	Metaphor, euphemism
Schism lived experience	MLB	Body, doing, physical effects
	ML	Holistic effects
Sensemaking	SI	Interruption, trigger to sensemake
	SD	Data (primary) mindfulness, filtering, testing, active
	SK	Knowledge (secondary) synthesised, decided
	SN	Narrative, plausible, rationalisation, sensegiving

As this example shows, coding did not produce neat categories or a typology to build theory. Rather codes were one way that data was sorted, examined, re-sorted, and understood. A frequency chart was completed, indicating common and unique themes and trends (see Appendix C, Figure C2).

Coding was imperative for surfacing important ideas, cross checking, and testing abductive leaps.

The final round of coding was done by hand in Microsoft Excel. Use of CAQDAS (NVivo) was trialled but found less useful, except for transcribing. Extracting quotes in CAQDAS decontextualised them, and multiplied already copious data since clauses had multiple codes. Keeping each narrative whole meant quotes could quickly and easily be reviewed in context (see Appendix C, Figure C3).

Sorting of themes utilised the versatile paper and scissors method, every flat surface available, and a large whiteboard (Ryan & Bernard, 2003). This method facilitated looking at the data as a big picture, and at the same time seeing fine-grained detail. This multi-viewpoint facility was not found using a computer screen, especially with the CAQDAS software. An example of how this rich and complex data set was organised is illustrated in Figure 2, which follows a single thread from data, through sub-themes, to theme.

As data analysis shifted to theory development, emphasis subtly shifted from “What is going on here?” to “What social dynamics observed here define and explain schism?” For example, one of the strongest emerging themes was “leadership breakdown” (see Chapter 5). Every schism seemed to involve multiple breakdowns in different aspects of group leadership. Leadership breakdowns had been sorted into four types, “disconnected community,” “leader not leading,” “contested leadership,” and “structural deficiency.” This classification evolved when considered from the perspective of theory construction (see Figure 3). “Group leadership capacity” was introduced as a concept which better represented dynamic construction and deconstruction of group leadership, and removed the negative connotation of the word “breakdown.” The sub-theme “contested leadership” was an artifact of a priori knowledge from literature, and was subsumed as part of “contest,” which was found to be a defining characteristic of schism. Simpler labels were chosen for the other three categories: “people,” “network,” and “structure.”

Figure 2 Generating Themes from Data

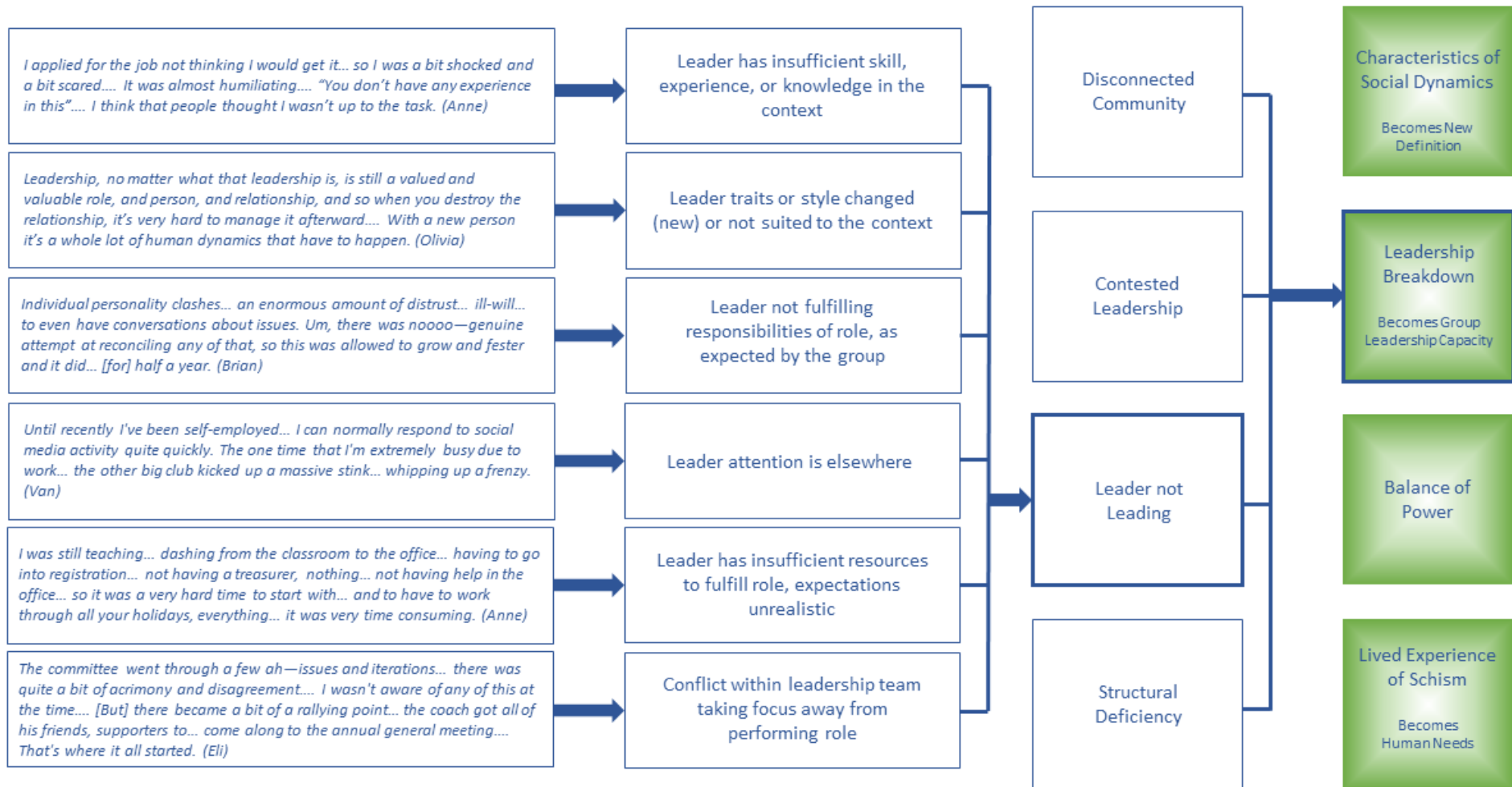


Figure 3 Themes to Theory

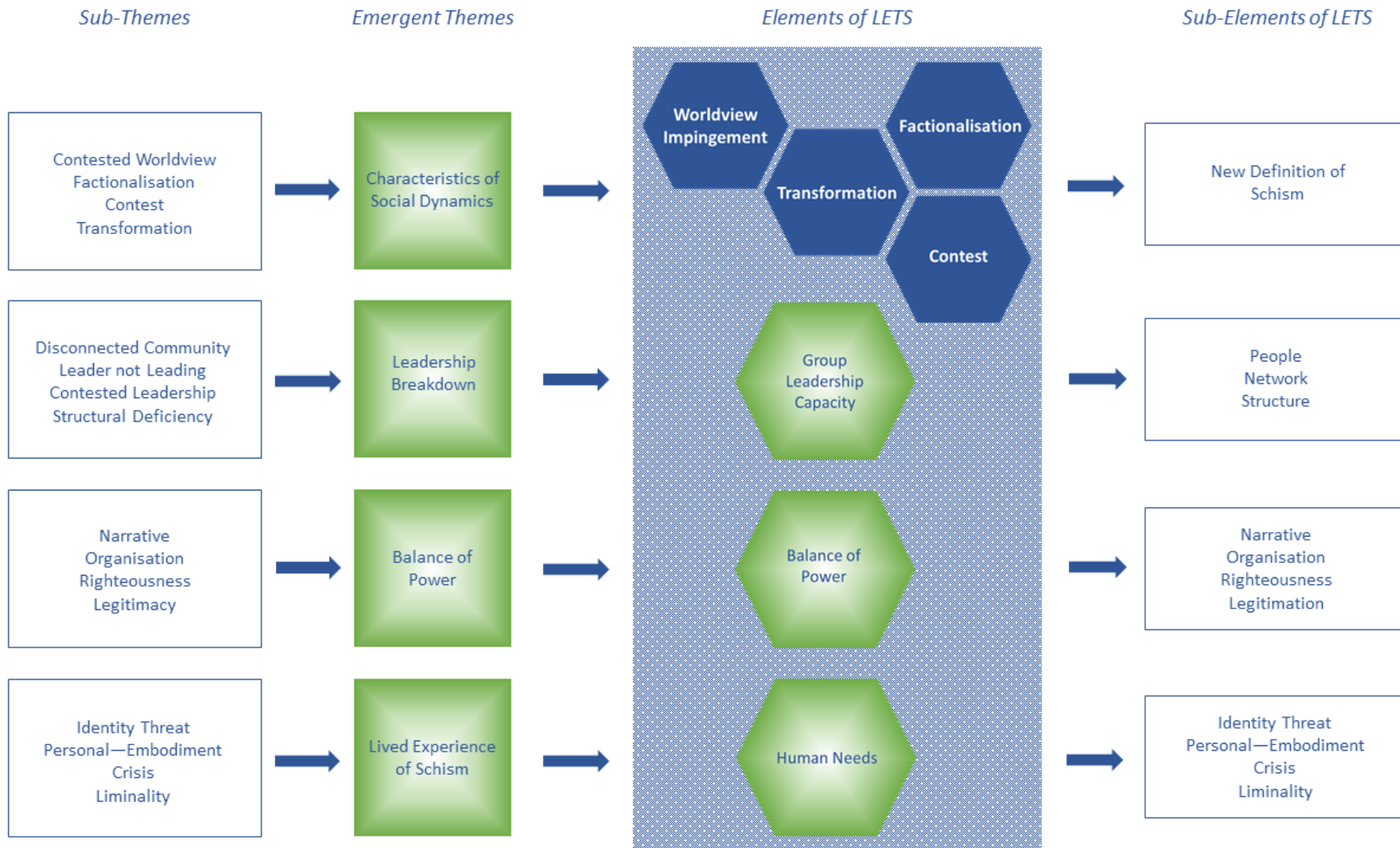


Figure 3 shows the elements of the emerging theory, which became known as LETS, and how small modifications were made to the sub-themes and themes generated by bottom-up coding categories. The fine-tuning accounted for dynamics between the elements, rather than their mere existence; used language which made it easier to communicate about the ideas; and considered how LETS may be put to use.

Theory Development

Theoretical findings presented in this thesis were constructed over the course of the project, as is fitting for research undertaken in an interpretivist or social constructivist paradigm. Theory development conformed with principles in Eisenhardt and Ott (2018) of theory building from multiple cases. Concepts, and the relationships between them, were grounded in data and integrated with existing literature. Thick data provided immersion in the phenomenon of schism, via specific instances of schism, from multiple participants. Each case stood on its own as an individual unit of analysis and this replication made it “more likely that the resulting theory [would] be accurate, generalizable and parsimonious” (Eisenhardt & Ott, 2018, p. 81).

Variety in the cases provided the opportunity to “untangle complex processes that may have led to the limitations of prior work” (Eisenhardt & Ott, 2018, p. 87). The study of multiple cases enabled greater generalisability than past schism models, where cases tended to be singular (Sani & Pugliese, 2008; Sani & Reicher, 2000), or few (Balsler, 1997), or sampled for similarity of context and characteristics (Dyck & Starke, 1999). The current research was cognisant of Eisenhardt and Ott’s (2018) principles of rigour in theory building: asking the right questions; theoretical sampling and compelling evidence; and accuracy and internal coherence.

Abductive reasoning also played a strong role (Ezzy, 2002). “Blaise Pascal... proposed that advances in understanding require *both* ‘the spirit of *finesse*’ (intuition) and ‘the spirit of *geometrie*’ (system) in more or less equal measure” (Scheff, 2014, p. 109). Abductive leaps created new ideas and perspectives, which were tested and refined (or thrown out). Rich, participant-led data acted as

a renewable resource. When new questions emerged, the data was there to test ideas for soundness; the participants were right there, “talking back” (Flyvbjerg, 2006, p. 236). The multiplicity of perspectives and contexts provided examples and, importantly, exceptions to the rule. “It is falsification, not verification, that characterizes the case study” (Flyvbjerg, 2006, p. 235).

Processes of induction and abduction were iterative and multiple. Two moments of inflection in thinking are noteworthy. The first was reimagining schism through problematisation of existing schism research—endeavouring to think differently about what is known (Alvesson & Sandberg, 2011)—which is discussed in Chapter 4 as the inflection point. The other was the recognition that the “day-to-day unfolding” of power was inseparable from consideration of the “political project,” and that talking about power in organisation studies is not unthinkable (Bencherki et al., 2019, p. 13) and not even too difficult. This prompted an embrace of complexity and open system thinking in all aspects of schism, not just power.

Part of the research process was asking what makes a good theory, and what a good theory should be able to do. Research is more than filling gaps. Corley and Gioia (2011) stress the value of “drawing attention to areas we need to understand from a theoretical point of view that have relevance for significant organizational and societal issues” (p. 24). In other words, make it a priority to influence the conversation about problems that matter. This is important because theory does not merely describe reality, it shapes it (Gond et al., 2016). Developing a theory is not just a matter of asking “What is going on here?” and then immersing in data, finding patterns intuitively and systematically, testing and retesting, and seeing how they fit together—though it is all those things. Developing and communicating theory is a “persuasive accomplishment” (Welch et al., 2013, p. 246). Schism is a problem that matters, and the lived experience theory of schism proposed here is an attempt to stimulate and shape a conversation about it.

Summary of Research Design

This qualitative research was based on an interpretivist research design (Creswell, 2013), using a social constructivist philosophical framework (Berger & Luckmann, 1966), and applying a lived experience lens.

The study was undertaken in nonprofit organisations in Western Australia. Sampling was at first by convenience, then snowball. Participant-centred, discovery-style interviews, using open questions with supplementary probing (Bridges et al., 2008) provided rich primary data (41 interviews, 1 hour each, schisms in 24 organisations). Participant narratives, as data, were recognised as having a liminal and temporal nature, and for their role in meaning making and construction of reality (Polkinghorne, 1995; Rhodes & Brown, 2005; Sandelowski, 1991). “Not how to know truth, but rather how experience is endowed with meaning” (Sandelowski, 1991, p. 165).

Iterations of coding used bottom-up and top-down schema (Miles et al., 2014). Intertwined with coding was the emergence of themes (Ryan & Bernard, 2003) and problematisation of existing models (Alvesson & Sandberg, 2011). Monitoring researcher subjectivity and premature closure was constant, and backtracking at the insistence of data was a regular exercise.

Analytic memoing (Miles et al., 2014), diagramming, verbal articulation of emerging concepts, and writing chapters aided the construction and reconstruction of conceptual understanding. Switching between immersion in data and big-picture mental models, and holding both in tension, helped retain the connection between lived experience data and abstract theory. Conscientious, systematic, inductive analysis of primary data (Creswell, 2013), and intuitive leaps and shifts in perspective utilising abductive analysis (Ezzy, 2002), combined to facilitate the development of a new definition of schism and a lived experience theory of schism.

Chapter 4 Proposed New Definition of Schism

One of the first requirements in establishing any viable body of theory is that of providing workable definitions. (Holsti, 1979, p. 100)

What is Schism?

Researchers agree on one thing: schism is common and inherent in all social systems (Balser, 1997; Bateson, 1935; Hart & Van Vugt, 2006; Morgan, 1981; Pondy, 1967, 1992; Sani, 2008; Turner, 1980). Anthropologist, Victor Turner (1980), was convinced “it is, indeed, a spontaneous unit of social process and a fact of everyone’s experience in every human society” (p. 149).

But what, exactly, is “it”?

Authors use alternate terms for schism, and the term “schism” is used to mean different things. Definitions and models share common elements but significant contradictions. Over time and across contexts, it is not surprising inconsistency has arisen in describing, defining, and theorising schism. This situation is adverse nonetheless, for sharing understanding, especially relevant since schism literature is so sparse (Asal et al., 2012; Balser, 1997; Hart & Van Vugt, 2006; Sani & Reicher, 2000; Wagoner et al., 2019). No widely accepted definition of schism was found in the literature.

The ontology of schism is examined in this chapter, which focuses on two of the four emerging research questions: “What is a schism?” and “What contexts, social dynamics, and characteristics (elements) do schisms have in common?” Combining data analysis and discussion, this chapter addresses the need for a general definition identified in the literature review, the value of reconceptualising schism, how the research data supports the proposed new definition of schism, and how the new definition advances the literature.

Several steps were taken in developing the proposed new definition of schism, and each is elaborated in this chapter. First, the inconsistent language in published research prompted an audit of uses of the term schism, and five distinct meanings were identified. Second, the six core models discussed in the literature review were examined for consistency and potential for integration. Third,

an inflection point in the research process allowed the problematisation of existing concepts, and for schism to be reconceptualised. Finally, a new definition of schism in a social system was developed from emerging themes in the data. The chapter continues with presentation of data supporting each element of the definition. The proposed new definition is shown to be coherent with the six literature models, and to resolve discrepancies and disjunctions between them. Moreover, an argument is put forward that the new definition is more fitting and more useful than any existing definition, and makes a theoretical contribution to knowledge.

Five Uses of the Term Schism

Schism has multiple meanings, depending on context. An investigation of academic literature, dictionary definitions, and news articles showed at least five uses of the term schism (see Table 7, including examples).

Division in the Abstract. Schism, meaning cleft or divide, is a common everyday use. It is division in an abstract sense, especially division which seems paradoxical or difficult to resolve. In academic literature, paradox, tension, and conflict can have similar connotations.

Division Between Subgroups. Schism, meaning a split or division between groups, embodies and socialises the divide. People share a view about the conflict inherent to the divide, and associate in subgroups based on this shared position. Active conflict may or may not be implied. In literature, this state is often considered a precondition or early stage of schism. For example, Balser (1997) would call this factionalism, and conflict would be implied. Hart and Van Vugt (2006) would call this a faultline, which is demographically based and does not necessarily imply conflict. Others would consider this merely the natural state of a society (Bateson, 1935) or organisation (Morgan, 1981).

Process of Division. Schism can mean to split or divide, or a process of division over time. A rare point of consensus in the literature is that schism is better understood as a process over time in a particular context (Zald & Ash, 1966). Several process models of schism are discussed in the next section, although these authors used alternate terms including schismogenesis (Bateson, 1935),

social drama (Turner, 1980), formation of breakaway groups (Dyck & Starke, 1999), and group fission (Hart & Van Vugt, 2006).

Formal Separation. Schism can mean a formal split, exit event, or identifiable separation or it can mean the act of formally splitting. When authors use schism to mean formal division, it is often paired with another word to indicate the split occurred after a process that included conflict and/or factionalisation. For example, internal conflict and schism (Balser, 1997), ideological cleavage and schism (Shriver & Messer, 2009), or faultlines and group fission (Hart & Van Vugt, 2006).

New Group Formation. Schism is sometimes used to mean a formal split resulting in a new group. Unsurprisingly, this use is more likely for researchers whose primary focus is new group formation (Asal et al., 2012; Dyck & Starke, 1999). It is also relatively common in religious literature as when a new church or sect forms (e.g., Potz, 2016). In some texts, schism could be interpreted to mean the breakaway group or sect itself (a group) rather than the formation of a new group from a parent group (an event); ambiguity is common.

Several questions emerged from this audit. Clarification was needed about whether schism may be ideological, social, or material, and if it is a phenomenon of social systems, the current state of a social system, a separation event, a separation process over time, or all of these. Schism was often described as a process including mass exit and sometimes new group formation, but are these elements definitional of schism, or just descriptive of a stereotypical or observable schism? Further, if schism is a process of ideation, factionalisation, conflict, and division, which part of the process is the schism or schism episode, and how is it distinguishable from the context leading up to schism and the aftermath and recovery?

In summary, there is no consensus about what academics mean by schism. This is not inherently problematic, as readers are fully capable of understanding the author's meaning in context. But it is problematic for developing theory. The audit underscored one source of inconsistent findings across theoretical literature: authors have different preconceptions about the phenomenon or process they are researching at the most basic level—what a schism is.

Table 7 Five Uses of the Term Schism

Use of Schism	Example
<p>Division in the abstract</p> <p>A cleft or divide</p>	<p>“There was a clear schism between what they were expected to attain in order to be an adult and what they could conceivably achieve in the existent economy in Kibera.” (Farrell, 2015, p. 15)</p>
<p>Division between subgroups</p> <p>A split or division between groups of people, with or without active conflict</p>	<p>“There is a schism between those who see deafness as a medical condition and those who see it as an identity.” (Mellett, 2016, p. 5)</p> <p>“‘Schism’ is in fact <i>le mot juste</i> for Brexit.” (Ferguson, 2017)</p> <p>“This is not a country essentially split between Labourites and Tories: we are now either leavers or remainers, with large swathes of each camp motivated by boiling passions... The Brexit divide is only symptomatic of even more fundamental differences.... Two great demographic blocs now stare across the divide with a mixture of mutual mistrust and bafflement.... We are now close to losing any coherent sense of who ‘we’ are.” (Harris, 2018)</p>
<p>Process of division</p> <p>To split or divide; a process of division over time</p>	<p>“In addition to referring to a group that has splintered off from another body, ‘schism’ is a verb referring to the <i>process</i> of splitting. The actual dividing of an organization is usually only the final stage in a conflict that has been taking place for some time.” (Lewis & Lewis, 2009, p. 3)</p>
<p>Formal separation</p> <p>A formal split, exit event, identifiable separation (noun); or the act of formally splitting (verb)</p>	<p>“Schism occurs when a faction formally breaks its membership ties to the organization.” (Balsler, 1997, p. 200)</p> <p>“Groups tend to be internally subdivided into competing factions.... A faction may cause a schism; that is, it may leave the parent group in order either to join another group or to create a new, breakaway group.” (Sani, 2008, p. 718)</p>
<p>New group formation</p> <p>A formal split resulting in a new group (verb); or a new group formed through splitting of existing group (noun)</p>	<p>“The idea of schism is applied to the formation of a new group resulting from successful and official breakaway from a preexisting group.” (Asal et al., 2012, p. 99)</p> <p>“A dissatisfied group of believers may seek new revelation, fresh interpretation of the existing tradition... new ritual forms etc. In social terms, this results in a schism—a formation of a new community of believers.” (Potz, 2016, p. 205)</p>

Theories and Definitions of Schism in Literature

Examination of the literature was an important step in developing a definition of schism. The six core models of schism (discussed in Chapter 2) and other literature definitions were compared for consistency and overlap. Authors described or defined schism in different ways, using different language, and based on varying assumptions. It was not possible to extract an overarching definition without privileging one representation over others. The difficulty encountered in trying to integrate various conceptualisations into a singular definition is illustrated by comparing, in Table 8, the six models selected as the most well-developed theoretical concepts of schism in organisation studies (Balsler, 1997; Dyck & Starke, 1999), anthropology (Bateson, 1935; Turner, 1980) and social psychology (Hart & Van Vugt, 2006; Sani, 2008).

Characteristics of schism recurring in these models, but not necessarily common to all of them, include factionalisation; conflict; group, society, or organisation as unit of analysis; linear process; mass exit; and new group formation. There are differences in focus of research; conceptual framework; normative assumptions about organisations, conflict, and schism; and terminology. Findings vary with respect to perceived cause or trigger, mechanism of factionalisation, development of conflict, and schism outcomes including mass exit and formation of a new group. There are noteworthy concepts which are barely discussed, including leadership and power.

As can be seen in the table, there is no single model which incorporates or supersedes all the others, and none are generalisable to all contexts. They all represent important aspects of schism, but attempts to integrate them into a single definition or theory were confounded by variation in research context, purpose, design, and findings. These authors cite each other, however, so it is reasonable to assume they are describing the same phenomenon or process. A general definition or theory should not discount the findings of these authors without good reason. The current work proceeded on the assumption core similarities must exist even though, on the surface, findings show significant contradictions.

Table 8 Comparison of Six Core Schism Conceptualisations in Literature

Author (Year)	Model	Assumption About Social System Before Schism	Brief Description
Bateson (1935)	Schismogenesis	Cultures in contact, not integration or elimination, so dynamic equilibrium	Subcultures exist in dynamic equilibrium, interactions escalate or distort, if unrestrained lead to hostility and system breakdown.
Schismogenesis is a “process which if not restrained can only lead to more and more extreme rivalry and ultimately to hostility and the breakdown of the whole system.” (Bateson, 1935, p. 181)			
Turner (1980)	Social drama	Sociocultural systems with structural contradictions and norm conflicts	Social dramas occur in societies, following a process of public breach of a norm, crisis, redress, and either reintegration or recognition of schism.
“The final phase consists either in the reintegration of the disturbed social group.... or the social recognition of irreparable breach between the contesting parties, sometimes leading to their spatial separation.... Indicating reconciliation or permanent cleavage.” (Turner, 1980, p. 151)			
Balser (1997)	Impact of environmental factors	Organisation, unified and bounded, existing within open system	External factors act as a source of internal tensions, creating conflict, factionalisation, and schism.
“Schism occurs when a faction formally breaks its membership ties to the organization.” (Balser, 1997, p. 200)			
Dyck and Starke (1999)	Formation of breakaway organisations	Bounded, harmonious	Process model with six stages: relative harmony, idea development, change, resistance, intense conflict, and exit. Each stage progresses to the next through a catalysing or trigger event.
“A breakaway organization forms when a group of organizational members, frustrated by their inability to implement change in their parent organization, leave it and start up a new organization.” (Dyck & Starke, 1999, p. 792)			
Authors do not use the term schism; however, this work is cited in schism literature, for example as “a process model of schism.” (Balser, 1997, p. 226)			
Sani (2008)	Social psychological model of schism	Bounded, unified	Change to group norm causes members to perceive group identity being subverted. Increased schismatic intention through lowered identification and sense of entitativity.
“Schism is about subgroups that are no longer able to be part of the same group because the sharing of fundamental principles has ceased to exist (at least according to the members of one subgroup).” (Sani & Todman, 2002, p. 1653)			
Hart and Van Vugt (2006)	Faultlines and group fission	Pre-existing faultlines	Faultlines predict the makeup of groups after fission, but conflict is a necessary trigger.
“Group fissions have been referred to as schisms, factions, group exits, or breakaways.” (Hart & Van Vugt, 2006, p. 392)			

Inflection Point

Numerous attempts were made to reconcile literature, schism in world news, personal experience, and themes emerging from the lived experience data. It was thought by identifying disjunctures and inconsistencies between existing models, and asking specific questions of the data, some conclusions may be made. But no matter what changes were made to the many models drawn they remained complicated, incorporated too many contingencies and redundancies, did not resolve the inconsistencies between literature models and, worst of all, data stubbornly refused to conform.

One interim model of schism (see Appendix D, Figure D1) was significant because it was the last attempt to conform to the linear group process depiction of schism, which is so dominant in the literature. Despite persistent efforts to refine the interim model, it could not answer a fundamental question: “Which part of the whole process is the actual schism?” The interim model implies groups are always in some part of a cycle of schism. This has validity, especially in a conflict (Pondy, 1967) or group development (Tuckman, 1965; Worchel et al., 1991) framework, but is really no more than saying groups are intrinsically heterogeneous (Lau & Murnighan, 2005), conflictual (Deetz, 1996), or schismatic (Morgan, 1981). Similarly, it is accepted in schism literature that schism is a process which occurs over time, but identifying the beginning and end of the schism episode is important.

Participants in the current study instinctively recognised the experience of schism, distinct from everyday organisational life. There is value in researching exactly how and why the lived experience of schism is so distinctive. The interim model failed to resolve even modest questions about cause, outcomes, boundaries, normativity, power, climax, mass exit, and new group formation.

In retrospect, the form of the interim model and its predecessors seems elementary or perhaps naïve but, from the perspective of the literature review and personal experience, a linear model was the obvious place to begin. This starting point originated in the assumption that a solid foundation for the research would exist in the literature. Persevering with these models was an attempt to hold onto some certain knowledge amongst all the flux, rather than create more by interrogating fundamental assumptions of previous researchers. It took time to grow into the new

role of legitimate researcher permitted to question and critique. Pragmatically, it was taken for granted any model developed would ultimately be represented as a diagram, but drawing on a piece of paper in two dimensions was restrictive, and it refused to work.

Serendipity played a part in unlocking new possibilities. At the same time the puzzle seemed frustratingly unsolvable, Desan (2019) published his case study of the French Socialist Party and the invention of neo-socialism.

Schisms, I suggest, do not simply ratify pre-existing divisions; the schismatic process is what renders divisions meaningful, and this process can constitute the very divisions that are subsequently presumed to have been at the origin of it. In other words, the process of schism itself can generate schismatic identities. (Desan, 2019, p. 685)

Here was evidence of schism constructed and conceived of in a novel way, which contradicted conventional wisdom, identified some of the same ambiguities in literature models, and resonated with the current research data. Desan's claims made questioning published research suddenly feel less presumptuous.

In keeping with an interpretivist philosophy, therefore, all prior knowledge *including literature* was considered uncertain and held in abeyance, while data was brought to the fore. Ambiguity was allowed to exist. As when misplaced puzzle pieces are found and removed, things began to fall into place. The first puzzle piece removed was conceptualising schism as a linear process ending in mass exit. The second was the assumption schisms occur within a bounded entity.

Realisation of critical flaws in the interim model, and the unsuitability of any existing concept of schism in the literature, marked an inflection point in data analysis and theory development. Ultimately, schism was conceptualised as a unique social phenomenon, common to all social systems: a complex process of social construction in an open system. This framing was a better fit with data and enabled integration of disparate findings in the existing literature.

Proposed New Definition of Schism

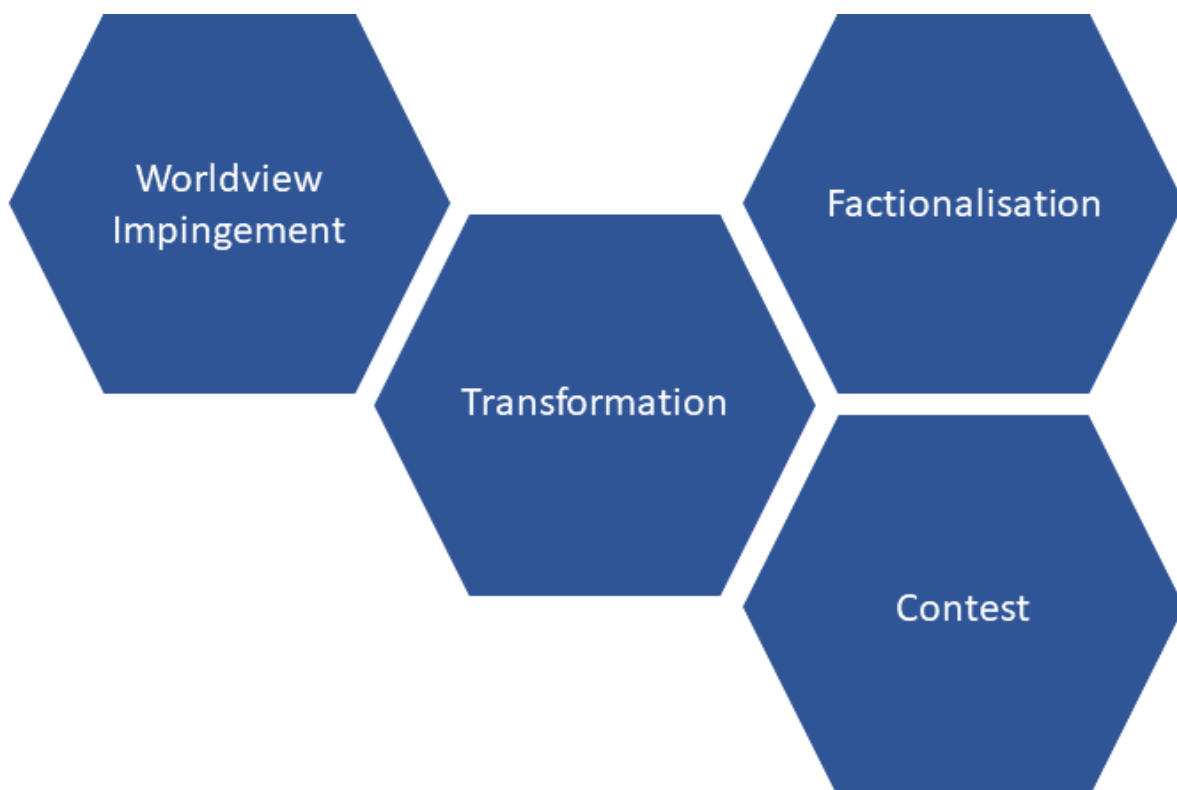
A new definition of schism is proposed, based on this research:

Schism is defined as a complex social process identified by the concurrence of four interacting elements: worldview impingement, transformation, factionalisation, and contest.

The four *definitional elements* of schism emerged from data and were integrated with literature concepts. They are the necessary and sufficient elements to define schism, that is, if all four definitional elements are perceived to be present, the social system can be said to be in schism.

Figure 4 is a representation of the definition; the four hexagons are arranged to imply the (nonlinear) complex relationship between the elements. A system is *complex* when it cannot be fully understood, as a whole, by simply analysing each element, the environment, and the interactions between them (Uhl-Bien et al., 2007). The four definitional elements are themselves socially constructed, interact in complex fashion, and can manifest in any order.

Figure 4 Proposed New Definition of Schism.



Discrepancies between the six theoretical models outlined in Table 8 can often be traced back to differences in ontology and epistemology, whether explicit or implicit. Assertions underpinning the new definition are made explicit here for transparency and theoretical rigour (Eisenhardt & Graebner, 2007). Assertions are congruent with a social constructivist worldview and are conclusions drawn, from data and literature, about the nature of schism.

- Schism, in this thesis, refers to a phenomenon of social systems, a complex process of social construction, and/or the state of a social system.
- Schism in any social system is essentially the same phenomenon, therefore it is possible to articulate a general definition of schism.
- Schism is a human construction. The social construction of schism is complex and multidimensional. Time is one of these dimensions and construction of schism can be retrospective (see Chapter 6).
- Schism is a natural phenomenon of social systems, inherently neither positive nor negative. No normative judgments about schism are implied (see Chapter 6).
- Boundaries are socially constructed. They are flexible, and change with context, perspective, and time. They are permeable to, for example, people, relationship networks, knowledge, new ideas, values, expectations, resources, and power. No boundaries of the social system of interest are imposed (see Chapter 6).

Four Definitional Elements of Schism

The four definitional elements of schism—worldview impingement, transformation, factionalisation, and contest—are outlined in Table 9. The remainder of this section, which combines data and analysis, elaborates on the definitional elements, thereby supporting their inclusion in a definition of schism. Each element is defined, and examples from the data presented. Alignments with and deviations from the literature are noted, along with how the proposed new definition resolves inconsistencies. Elements are treated separately in this chapter, to be systematic, though

some interactions are noted. Complex interactions between elements are highlighted in the context of LETS in Chapter 6.

Table 9 Outline of Definitional Elements of Schism

Definitional Element	Characteristics	Example Quotes
Worldview impingement	Conflict or tension between worldviews	<i>"That's not the sort of organisation we want"... "You're running it like a business"... "You've lost us"... "We're not HAPPY." (Philip)</i>
	Perception of impingement	<i>The family school is what attracted people to the school, and yet trying to... fulfil those... external needs. Very hard. (Anne)</i>
Transformation	Perceived potential for or actual transformation	<i>There has been... incidences where clubs have changed their constitution, and it sounds ridiculous, but they have included women [laugh]! (Neville)</i> <i>For thirty years, they were an UNFUNDED, consumer voice. And when they did... transition... they were having to move from being an operational board to a strategic board... that HUGE personal conflict that people were having, around being eyes on, hands off, kind of philosophy. And it took over two years... But all the historical members... who lobbied government to give them funding, are no longer there. (Penelope)</i>
Factionalisation	Personification (embodiment)	<i>She... made it quite clear... that it was "them versus us." (Shaun)</i>
	Identification (ingroup–outgroup dynamics)	<i>They got pretty hostile.... We sort of knew it was pretty poor form... a cheap shot at the...18-year-olds.... first time on a committee.... It was pretty confronting.... [But the older members of our group] stood up for us. Definitely made me feel a bit more comfortable. (Finn)</i>
	Socialisation (collective action)	<i>I would like to think I was not necessarily one faction or another. Um, I was very "school." (Brian)</i>
Contest	Schismatic conflict	<i>It's fight to the death. (Belinda)</i>
	Competition replaces cooperation	<i>I already knew that it was going to come down to her or me.... It was awful, everything, the way it went down, the end was just horrible.... I was so blindsided.... It was so hurtful, it was just... completely devastating. (Linda)</i>
	Win–lose	
	Negative affect	<i>"It doesn't matter that the Coopers are president and secretary. At the moment they'll make life hell... but it doesn't matter." So, I thought to myself, "Okay, we lost the battle, but we will win the war." (Cam)</i>
	Contest for power	

Worldview Impingement

The definitional element *worldview impingement* refers to conflict or tension between worldviews including a degree of perceived impingement or mutual exclusivity. Different, even irreconcilable, worldviews are inevitable but can be managed without leading to schism. Nonprofit organisations routinely manage tensions between mission and money, for example, as well as disparate needs of stakeholders. Impingement, ideological or material, may also be managed. Haugaard (2020) described the willingness of people in a just and predictable society to compromise or take turns getting needs met in the furtherance of such a society: in his words to exchange “episodic loss” for “dispositional gain” (p. 191). Managing impingement has been researched in a schism context: the concept of identity elasticity, applied to ongoing development of group identity, explores the potential to include rather than exclude (Kreiner et al., 2015). It is possible to reduce the perception of worldview impingement even if circumstances essentially remain the same.

Social movement actors may deliberately increase awareness of impingement by drawing attention to the lived experiences of nondominant groups whose worldviews are marginalised. Managers are inclined to accentuate shared goals, values, and interests, to stress the salience of whole group identification over subgroup identification and ameliorate a sense of impingement. Worldview impingement may combine with the potential for transformation to generate threat perception, which can manifest as resistance to change (Dyck & Starke, 1999; Sani & Reicher, 2000). Opposing factions do not always develop a sense of worldview impingement at the same time (Dyck & Starke, 1999). Factionalisation and contest are unlikely until the dominant group perceives threat to their worldview, perhaps in response to developing voice or power of a nondominant group.

Worldview impingement was identified in each schism described by participants. The nature of the impingement varied from profound to seemingly trivial, was described differently by participants even in the same subgroup, changed form during the schism, and could be multiple. Worldview impingements were variously ideological, material, personal, and relational. The specific form was not important, rather that people placed a high value on whatever it was. Identity threat

was a common theme. Identity threat was not restricted to subversion of organisational identity (Sani, 2008). Rather, threats could be to the meaning, value, or enactment (Petriglieri, 2011) of organisational, personal, or social identities.

Tim related a schism at his club triggered by worldview impingement. One group perceived they were being denied a right to participate in democratic decision making, and the current president and her husband perceived threat to their leader identities.

We had a president who'd been president for over ten years... She was... really good, and efficient, but it was HER club.... And then we got some new members join up, that weren't prepared to just sit back and take whatever they dished up. They said no, this is not democratic. She... pulled up stumps and took her cricket bat away... and everything! (Tim)

Tim described how the affronted president and her husband left to form another club, thinking a majority would follow. A few did so, but the new club quickly folded. Members who had accepted her autocratic leadership over the years expressed newfound—or newly legitimised—resentment. She was permitted to return to her old club, in consideration of her contribution and the limited options in a country town, but was afforded lower status and power.

Well look, we don't want her back on the committee. At any cop. So that's how I got roped into bein' vice president.... To make sure that they didn't get ahold of it again. It's just a shame that it has to work like that. If she and her husband had been realistic... they would probably be life members. And people would hold them in esteem for all the good work they did for all those years. (Tim)

Tim's empathy was not misplaced. Her identity as president involved recognition as well as providing the satisfaction of contributing and feeling capable, and a sense of belonging, all of which Tim described as important to her. It was not uncommon in the data for schism to involve people who most valued their involvement in the group, and this corresponds with literature (Turner, 1980).

Data suggested schism research is overfocused on the specific form of worldview impingement. This focus is understandable; worldview impingement is often conflated with cause or trigger, and there is interest in knowing how to avoid causing or triggering schism. But in the data, worldview impingement could take many forms, and occur in any order relative to other definitional elements. From these observations, some contradictions in the schism literature may be addressed.

First, authors variously claim schism is characterised by perceived identity subversion (Sani, 2008; Sani & Pugliese, 2008; Sani & Reicher, 2000), public breach of a norm (Turner, 1980), resistance to introduction of new ideas (Dyck & Starke, 1999), external forces creating internal tension (Balsler, 1997), or power struggles over leader positions and religious practices (Pötz, 2016). If these are all classed as events or contextual factors which induce a perception of worldview impingement, this basic contradiction between models is obviated.

Second, most models situate worldview impingement temporally first or early in the schism process. Desan's (2019) work challenges this perception by showing conflicting ideologies being socially constructed to rationalise and justify existing factionalisation. Other literature depicts factionalisation preceding conflict through naturally occurring divisions: cultural (Bateson, 1935), demographic (Hart & Van Vugt, 2006), role or knowledge (Berger & Luckmann, 1966; Gorup & Podjed, 2015), or ideology and purpose (Hobbs, 2011). Data showed some participants became involved in schism because they were concerned about future worldview impingement or transformation. *We don't want the club to sort of—being dramatic—but fall into the wrong hands (Finn)*. The proposed new definition does not require temporal ordering of the definitional elements, so this inconsistency is also resolved.

Third, as noted, worldview impingement can be present without schism occurring. There is little existing research which explores, convincingly, why schism occurs sometimes and not others. The new definition offers an explanation via the requirement for all four elements to be present, and the importance of their interrelationship. For example, if worldview impingement is present but whole group unity is strong, precluding factionalisation, the group is less likely to schism.

Transformation

“All social reality is precarious. All societies are constructions in the face of chaos. The constant possibility of anomic terror is actualized whenever the legitimations that obscure the precariousness are threatened or collapse.” (Berger & Luckmann, 1966, p. 96)

The definitional element *transformation* refers to actual or potential transformation, which participants may experience as opportunity or threat, disjuncture with the past, or an uncertain present or future. For the purpose of defining schism, the presence of this element is not dependent on whether transformation of the social system actually occurs, and often the status quo is returned. Neither is transformation necessarily the concluding stage or outcome of schism (e.g., mass exit). Transformation can become salient at any time. Literature examples of transformation include founder exit (Balser & Carmin, 2009; Potz, 2016), adapting to a changing political environment (Balser, 1997), and aligning with changing societal values (Kreiner et al., 2015; Lee & Porter, 2020).

Social systems are constructions but are experienced as reified. Worldviews, experienced as objectively real, are contested in schism. Haugaard (2020) explained when the “conditions of possibility” are challenged, the “sense of the fragility of social order” is a form of ontological insecurity, and creates resistance (p. 55). Thus potential or actual transformational change is likely to induce factionalisation and contest. In the study, confronting the possibility that reality was not fixed was extremely unsettling for people and contributed to how they felt and responded in schism. Participants described a sense of crisis and liminality in schism (see Chapter 5). Literature in crisis and liminality affirms major disturbances (such as schism) are linked with or necessary for transformation (McCabe & Briody, 2016; Nash, 2013; Sewell Jr, 1992; Zald & Ash, 1966).

Transformation is not typically identified in schism literature as definitional of schism in the same way conflict and factionalisation are. Rather change is seen as contextual information or a triggering event. Change is more likely to be treated as an explicit feature of schism when the author is researching positive potential of either societal transformation (Gorup & Podjed, 2015; Nash,

2013; Turner, 1980) or schism (Kreiner et al., 2015). Social movements, political parties, and nonprofit organisations are relatively common contexts for schism in the literature. The integral role of transformation in schism, posited here, suggests these organisations may naturally experience schism more often simply because their core business is generating societal change, and therefore this element is almost always inherent. The decision to include transformation as a definitional element was supported by these ideas, but primarily made on the strength of data analysis, which showed a strong association between transformation and schism.

Once again, it was not the specific form of the change that generated conditions for schism, but human responses to potential or actual transformation, which was dependent on perspective and changed as the schism progressed. Schisms can often seem unnecessary, trivial, or even incomprehensible to outsiders, and this was illustrated in the data. One member-benefit club organised multiple camping trips throughout each year. A proposed change—for dogs to be allowed on some trips—was so bitterly contested the schism went on for a year. The passing of the infamous Dog Policy came down to a deciding vote by the president. *We had members that actually LEFT because of the Dog Policy (Logan)*. For some, this was a transformation of the club's identity.

An unanswered question in the literature is whether certain types of conflict are more irresolvable and likely to lead to schism (e.g., ideological vs. material, Sani, 2008). The Dog Policy, and other conflicts in the data, suggest any conflict can lead to schism. Whether these schisms could have been averted is a separate question. Whether some types of conflicts are perceived as more *legitimate* causes of schism is another. Desan's (2019) work suggests this is so, and that groups will construct a legitimate conflict (e.g., ideology) to justify an illegitimate one (e.g., power struggle, personal animus). Supporting Balser's (1997) work on external influences on internal conflict, it was also noted that observable connections between transformation and manifestation of schism could be so obscured or seem so tenuous that the schism appeared to be over a separate (possibly trivial or illegitimate) conflict. Externally imposed transformational change was a complicating factor in a large number of the schisms studied in this research, if not a direct driver.

Prior to the time of interviewing, many nonprofit organisations in Western Australia had been dealing with governance changes imposed by legislation, which required incorporated associations to operate using a corporate governance model (*Associations Incorporation Act 2015*; Department of Commerce, 2015). The institutionalisation of a style of governing coincided with a period where a new State Government funding model had been a driver for significant changes to social service nonprofit organisations, including professionalisation and increased size (Fitzgerald et al., 2014). The independent school sector had already been encouraged over a number of years to adopt this style of governance, through the reregistration process and for isomorphic legitimacy (King, 2016).

Some participants welcomed or accepted the transformation, perceived by most as inevitable, despite understanding what was lost.

Organisations like this, originally the boards were people with lived experience in their family of disability and all that sort of stuff. That's WHY they got onto the boards.... It's a much more business-like operation now. And it's much bigger.... It had to go in that direction. (Harry)

Others did not welcome or accept the changes. Resistance was evident.

They have an AGM and say, "Who wants to be on the board?" And people put their hand up. But it WORKS... They get people there that aren't... "corporates" that... get so... tied up in management lingo.... Everything's "strategic this" and "operating that" and all these THINGS, that lead to nothing. And the REAL work that the people...do... it's not THERE.... And it's not to say that those things don't have their place. But it's not the real world. (John)

Transformation was also observed as a schism outcome. Transformation was sometimes made possible by opening situations to new possibilities—possibly via chaos—or by increased energy and commitment of members generated by the lived experience of schism. Members of

Sporting Club 1 interviewed for this project were introduced in Table 5. These participants outlined the historical context of their schism, stressing the effect of several years of a dysfunctional committee and a consequent decrease in member engagement. This led, they believed, to a schism over control of the club made possible by members' lack of awareness of growing difficulties.

They saw there was a weakness, or a flaw in the club.... it was RIPE for doing a takeover bid. (Cam)

External threat has been posited as a unifying force between factions (e.g., Balsler, 1997). In the Sporting Club 1 case, there was an alliance between perceived outsiders and the existing committee, but the situation was still framed as an “outsider” or “newcomer” threat, which unified and mobilised the participants in this research and promoted schism.

It was very unpleasant, but FROM it has come what I would imagine is the most awesome committee there could be.... Maybe it was good that the Coopers came along, and gave the club a jolt? (Deborah)

After averting the perceived threat of takeover, the members of this faction found themselves on the committee, and their rekindled commitment to the club translated into rebuilding. It was commonly reported for winning factions to change constitutions, to add fixity to the outcome or to try to prevent governance processes being weaponised in future. Members of Sporting Club 1 had also diagnosed member disengagement as a factor enabling the takeover attempt, and believed they needed to rebuild club identity as well.

We couldn't let this happen to the club again.... So, as a committee, I guess we've got to focus on trying to generate community again... [tournaments] and things like that which hopefully will then get people engaged in the club, so that sort of thing CAN'T happen.... The other part is... in a PROCESS sense, ensuring that the RULES... of the club, are, you know, hopefully foolproof and tamper-proof—LESS tamper-proof. (Eli)

Schism literature concerned with transformation often associates change with the end of a linear process, or the outcome of schism. For instance, creation and destruction (Gorup & Podjed, 2015); a tool for societal or organisational transformation (Balser, 1997; Zald & Ash, 1966); organisational decline or demise (Hager, 1999; Worchel et al., 1991); the growing pains of identity work (Kreiner et al., 2015; Sani, 2008); or a restructuring of society (Turner, 1980). But, Balser (1997) and Shriver and Messer (2009) found external political transformation preceded internal group conflict, and Miller (1983) associated transformational growth in organisations with eventual schism. As previously discussed, the new definition does not impose an unwarranted temporal order, nor does it conflate the concepts transformation, cause, outcome, and ending. Including transformation as a definitional element enables quite disparate models in literature to be reconciled within one conceptualisation. Balser's external change framework, and process models with change as either a trigger or outcome, can all be comfortably represented by the proposed new definition.

The relationship of mass exit with transformation requires explication, as these concepts are sometimes conflated. A mass exit may create an identity change due to the loss of like-minded people who formerly contributed to the group's identity (Hart & Van Vugt, 2006). Or mass exit may leave the superordinate group in the hands of the change faction, as when the Church of England underwent schism over the ordination of women priests (Sani & Reicher, 2000). Mass exit is not always transformative, however. In the church groups studied by Dyck and Starke (1999) it was the status quo proponents who kept control of the superordinate group, and change agents who left and started a new church. Group development work by Smith and Berg (1987) described the reinforcing effect on group identity of externalising unwelcome ideas (projection) or people (scapegoating). Similarly, Berger and Luckmann (1966) stated that contrariness of a minority can be defined as "folly or wickedness" thus affirming the "symbolic universe" by acting as an example of what not to be or do (p. 99).

The perceived potential for transformation is an element in every schism. Transformation does not have to actually occur, it can occur at any time relative to other elements, and it does not

depend on mass exit. These claims will be revisited in the section following the final two definitional elements, where it is argued the proposed new definition is a better representation of schism than a mass-exit definition.

Factionalisation

The definitional element *factionalisation* is defined here as the adoption of conflicting worldviews by people who identify as a social group and have agency as a collective. This definition incorporates three main parts. First, personification or embodiment of the schism means opposing worldviews are advocated by people, and the divide is not merely abstract. Second, people identify with their subgroup; this identity can be in tension with their identification with the organisation (Petriglieri, 2011; Sani, 2008; Tajfel & Turner, 1979). Third, people in a faction undertake shared sensemaking and collective action, which is more complex and powerful than individual action (Hart & Van Vugt, 2006).

Participants did not often describe two equivalent factions. Factions were most similar when two subgroups in a volunteer-led organisation contested for control of the committee. There were also many situations where two subgroups contested without the whole group being involved. *I remember parents coming up and saying, "I had no idea this was going on" (Brian)*. Another common configuration was a subgroup versus the whole group, for example when new people came in and challenged the culture, when there was a new leader, or in a change–resistance situation.

Several leaders in the study had the experience of being targeted by a faction within the membership. Members of the organisation not aligned with the dissenting faction could be seen as “the whole group,” or belonging to the faction of the leader, on the basis that the leader is their representative. Most leaders, however, prioritised conflict containment over building factional support, and the dissenting faction were also careful about who they spoke with. *A lot of the community often don't know what's going on. Only "certain people" know (Anne)*. So quite often the leader's factional support was symbolic, rather than embodied in people who might *stand up for*

them in public or even be able to offer practical or personal support. Leaders who had the experience of being undermined all expressed a strong sense of isolation.

A principal's position is really hard because you can't talk to teachers. You can't talk to the admin staff. You can't talk to families. You can't talk to anybody. Because YOU ARE IT. (Belinda)

Some described support from their board chair, or a key ally on staff, and this made an enormous difference. Outside personal support was also described as valuable, but without affecting the power dynamics inside the organisation.

All these leaders considered their leader role to include controlling and resolving the conflict. This meant minimising escalation of schism, articulated as being for ethical, tactical, and strategic reasons: by not responding to attacks from opposing factions, no matter how grievous; and presenting an outward face that represented strength. Elizabeth replaced a founding CEO, and was appointed over the existing chief operations officer (COO), who had expected to be promoted to the position. Felicity was one of a cluster of participants (see Table 5) interviewed about Elizabeth's difficult first year as CEO. Felicity, who was a friend of the COO, described several first-hand experiences, work and social, where people openly expressed their antipathy towards Elizabeth, and openly coordinated their attempts to undermine her. Felicity also worked closely with Elizabeth, but had no equivalent first-hand knowledge of Elizabeth's experience. Felicity could only surmise the actions of others must have been *really causing her anguish.... She didn't let on, she led the ship, she led it well.... I think her credibility rose during that period of time (Felicity).*

People and factions who were not in positions of formal authority also had frustrating and difficult experiences, but in different ways. They were likely to gather supporters to counter a power imbalance, and their concerns were more focused on personal loyalties, the history of the organisation, and organisational identity and purpose (past and future). Gathering supporters escalated schism by making a contest possible. If they could not gather support, this tended to lead to individual exit rather than schism (e.g., Willow and Tilly, discussed later in this chapter).

Participants reported factions forming in a variety of ways from pre-formed friendship groups and demographic faultlines, to deliberate or inadvertent recruiting. Factions were not always self-defined. *We all went in singly [to the AGM], but after that we were labelled as a group.... I hate calling it a group 'cause we weren't, but we've been forced into being a group (Hettie)*. Factions formed slowly or suddenly, and opposing factions formed at different times in response to a perceived need for support (or power, see Chapter 5).

Participants in this research described their faction as serving human needs for affirmation, friendship, solidarity, support, belonging, distinctiveness, and power. Identity theory (Petriglieri, 2011; Sani, 2008; Tajfel & Turner, 1979) helps explain why factionalisation seemed to escalate schism. Ingroup–outgroup comparisons, for example, accentuated differentiation and widened the schism in the degree of difference and the number of dimensions of difference.

Language of differentiation and judgment—*us and them, good and bad, right and wrong*—and derogatory references to members of the opposing faction, were commonly heard in interviews. *He was so obnoxious and bullying and horrible (Hettie)*. Language signified strong negative affect toward members of the opposing faction, another feature of ingroup–outgroup dynamics. Labelling legitimised and delegitimised subgroups relative to each other, making recognition of equivalent status as negotiators more difficult, and contest more likely (Haugaard, 2020). Negative affect, combined with threat perception, made it hard for people to maintain a cooperative, win–win approach to conflict resolution. Secrecy, distrust, and ill will towards members of the opposing faction were common. Trust and communication broke down in the superordinate group and intensified in the subgroup.

The first... we became aware... we heard on the grapevine that this group of 14 had got together and actually held a secret meeting in one of the local halls.... They were very careful about who they invited. (Shaun)

Friendship groups overwhelmingly predicted alliances, and friendship groups tended to correlate with time in the organisation. Felicity, whose loyalties were torn, was the only participant

who expressed regret at possibly contributing to inflammation of schism, and this came about through personal loyalty.

When you're with friends and you just sympathise with them [soft confessional tone]... you babble on... actually go with their pain, and you go with their venom [big breath]... I wish I hadn't as much.... If I hadn't followed the path that everybody else had at that point... would it have helped? (Felicity)

Factions were not internally homogeneous, nor were boundaries clear. Some members of subgroups identified strongly with the faction, but there were members like Felicity who spanned multiple subgroups, were on the edges or belonged to none, or migrated from one faction to the other.

Factionalisation was an important resource of power in the schisms studied. Collaboration, not the agency of individuals, was needed to challenge or maintain power (Haugaard, 2020). The more favourable power position enabled factions to engage in a contest, and shared sensemaking reinforced perceptions of worldview impingement and transformation. Such reinforcing interactions between the four elements escalated schism.

It was noted, in schisms where multiple people were interviewed, that participants in the same faction tended to undertake individual as well as shared sensemaking. This applied to what they believed, what actions they planned to take, right through to making retrospective sense of what happened. Participants in the Sporting Club 1 schism, for example, had diverse views of a particular member of the opposing faction, and the pivotal role he played in the schism.

Got played big time. (Eli)

I kind of thought that [he] was on our side. (Dino)

I don't think he had bad intentions but in being a kind of nice, helpful person, he actually must have disclosed a lot of club documents to them. (Barbara)

In the end, I think I figured [him] out, he's just a massive snake. (Cam)

Faction members were cautiously sceptical of information, even when it originated with members of their own faction, and even when friendship and loyalty were pre-existing. In Sporting Club 1 again,

Cam was the first person to raise an alarm and try to build support. Finn and others went through a period of trying to gauge how realistic and consequential Cam's concerns were. *You can even... believe to some extent that it wasn't true but then you hear more and more things and then you see it for yourself and it's just, it's just the plain truth (Finn).*

While people did make up their own minds, positions were informed by sharing of information, suspicions, interpretations, and ethical viewpoints, and influenced by shared history and personal loyalty. People in the same faction were more likely to come to the same conclusions about the implications of each other's sensemaking experiments (Weick et al., 2005). Meetings were important for shared sensemaking. Public acts had extra weight as evidence: for coalescing information into knowledge, and for adding plausibility to a version of the narrative.

I thought to myself, "Okay... let's offer an olive branch, in case he's genuine"... In front of everyone.... I said, "Okay, obviously there's conflict about you being the president. How about, if you're so passionate about the club, why not just go on the committee and let someone else be president?" He wasn't willing to do that. (Cam)

This experiment, or test, was a key moment in Cam's quest to solidify his support. Every participant in this schism mentioned it in their interview as a turning point: a leap in certainty. The added certainty reinforced factionalisation and commitment to contest the schism.

The inclusion of factionalisation as a definitional element of schism is minimally controversial as most schism literature explicitly includes factionalisation as characteristic of schism. Again, there is inconsistency about the temporal order of factionalisation compared to other elements. Some works represent factionalisation, or at least inherent division, as preceding worldview impingement and conflict (Bateson, 1935; Gorup & Podjed, 2015; Hart & Van Vugt, 2006). Others see factionalisation occurring as a result of conflict (Balser, 1997; Kreiner et al., 2015; Sani & Reicher, 2000). Particular characterisations include an existing subculture being activated after a public act or breach (Boulding, 1969; Turner, 1980), factions forming in response to loss of a leader (Balser & Carmin, 2009; Potz, 2016), or ideological difference being constructed to legitimatise

existing factionalisation (Desan, 2019). Again, these inconsistencies are obviated by conceptualising schism as a complex social construction of four definitional elements, rather than a temporally fixed, linear cascade of elements.

Data showed a cornucopia of ways factions were arrayed in schism. For simplicity, in this thesis, discussion typically refers to two groups, which was the most common situation.

Contest

The definitional element *contest* is defined as a schismatic form of conflict between factions featuring negative affect and active engagement with the aim of winning. The term *contest*, rather than *conflict*, was chosen for clarity and accuracy. *Contest* connotes competition over cooperation (Deutsch, 1973; Deutsch & Coleman, 2000; Worchel et al., 1991), the active engagement of factions, and winners and losers.

I mean it was a straight “us and them.” We were the good guys, and they were the bad guys, and um—the good guys won. (Eli)

Conflict is universally associated with schism in literature, but the term *conflict* varies so much in meaning that a more precise term—*contest*—was preferred for labelling this element. *Conflict* can refer to tension, paradox, stressors, or competing priorities; this meaning is important in schism and is encompassed in the worldview impingement element. Literature on conflict and conflict management attends to conflict which is managed—more or less successfully—using established processes, and this type of conflict is referred to in this thesis as everyday conflict. Data indicated schismatic conflict is distinct from both tension and everyday conflict.

The distinctive type of high-stakes, high-intensity conflict in the active phase of schism was experienced metaphorically as war. *You just bunker down (Anne)—They decide to get more ammunition (Carmen)—Turned up with an army of friends (Deborah)—The battle can take over (Carmen)—Have got a lot of enemies (Matt)—Stick by your guns (Jane)—You can’t address that army face on, you’ve got guerrilla warfare (Ryan)*. Sport metaphors were also common, reflecting themes

including teams and loyal teammates, competition, and the expectation that, at the end of the day, one side will go home winners and the other side losers.

According to participants, the lived experience of schismatic conflict was different to everyday conflict. It was personal, principled, power based, hostile, emotional, embodied, and intense. Structural constraints and social norms were often breached. *I can't believe how BRAZEN they are (Deborah)*. Acceptance of a negative outcome for the opposing faction and schadenfreude were legitimised through identity differentiation that occurred with factionalisation.

It was common for factions in volunteer-run organisations to contest to establish a narrative, then for supporters, then for control of the organisation through formal authority, usually election to the committee. In organisations with paid senior staff, the last of these three steps was not a viable strategy, and it was common to see individual leaders undermined rather than see a contest for their position. When the perception was the opposing faction had minimal interest in meeting the (impinged) needs of one's own faction, contesting for power seemed a rational response (see Chapter 5). In organisations where voting was used for decision making, the relative number of people in a faction was a strong indicator of relative power. It was also a directly actionable and highly legitimate resource of power. Voting and formal authority were hard to beat.

In the Sporting Club 1 schism, after some initial skirmishes, the club voted—in a coup—to elect Daniel Cooper as president, and Tammy Cooper as secretary. This battle was won by the opposite faction to the study participants. A feature of schisms in the data was the number of times a strategic move won a battle but (despite expectations) not the war, and the opposition lived to regroup and fight another day.

Men must be either pampered or crushed, because they can get revenge for small injuries but not for fatal ones. So any injury a prince does a man should be of such a kind that there is no fear of revenge. (Machiavelli, 1961/1513, pp. 37–38)

To win the contest, the power shift needed to be decisive and at least semi-permanent. In the Sporting Club 1 schism, the election was not decisive. The study participants *rolled* by the coup

were alarmed and promptly offered to serve as ordinary committee members. *It was five of them and seven of us. I don't think they realised... otherwise they would have said, "Okay, we've got enough committee members, thanks".... They didn't do that (Dino).* The battleground—the voting forum—shifted to the committee, and the balance of power swung again.

In the familiar thrust and riposte, the opposition faction countered with a conflict-of-interest policy, in an attempt to disqualify some committee members from voting. It took a few months until the crucial committee vote was forced: the renewal of Cam's coaching contract. This vote was a symbol of where loyalty and power lay and, in practical terms made a potential change to the club's contracted coach a long-term prospect for the Coopers. They resigned the night the vote was cast in Cam's favour, cementing his and others' suspicion they had self-centred motives all along. *That's proof to me. Without a full-blown admission... actions speak louder than words (Cam).* With the collapse of the opposition faction—they all resigned from the committee, and some left the club—the war was won. The schism episode was over, and the winners had the aftermath to deal with.

A feature of schismatic conflict is the competitive nature of negotiations, compared to the cooperation usually associated with nonprofit organisations. Cooperation aims to meet needs of the whole group. Applying governance processes purports to arbitrate what is ethically or technically right. But competitions are won on the basis of relative power. Power struggles were indicative of a shift in the basis of conflict resolution from cooperation to competition (Deutsch, 1973).

This research showed a mismatch between accepted rules of engagement and effective winning strategy, when groups shifted from cooperative to competitive problem solving. There is nothing inherently wrong or unfair about competitive problem solving; it is used routinely in other contexts. But difficulties arose when there was an expectation of cooperation, and the rules of engagement were changed without warning or agreement.

The first glimmers we had of it, the meeting was to start at seven o'clock. And so, you know, you come in, you register, and all that sort of thing. But the doors were closed at seven o'clock.... They locked the doors! (Hettie)

People experienced such acts as morally wrong or illegitimate: *this is not how we do things*. These types of surprise tactics provoked righteousness, strengthened the resolve of the opposing faction, and escalated and inflamed schism.

Schisms inherently involve conflict that is difficult to manage within existing governance structures and social norms (Turner, 1980). Following existing process, however, often eased participants' experience of crisis and liminality (see Chapter 5). Process could be perceived as legitimate and fair, even when—objectively—it was not fair, nor solving the problem. Participants reported more control, and less uncertainty and stress, when they were able to use established processes effectively. The one part of Elizabeth's executive staff schism that felt straightforward was managing people out of the organisation, once it was considered a necessity. *It's the sort of thing which is just par for the course... we have employee grievances, performance management situations... It's something I'm sort of reasonably hardened to, I suppose (Harry, Elizabeth's Human Resources Director).*

Participants were often disoriented by the way people acted, or when established formal or tacit procedures were not being followed or were not working as they should. This disorientation perhaps signified sensemaking based on a cooperative mindset, surprised or confused by behaviour of people who had switched to a competitive mindset. People described being *outplayed* or feeling *betrayed*. *I felt, I felt stupid. Really stupid (Linda)*. The transition from cooperation to contest was not easily delineated. Schisms were messy and uneven, and not every person, in every context, was thinking or acting completely cooperatively or completely competitively. Understandably, people hedged their bets, and appearances were often deceiving.

Leaders in the study reported being well aware of a shift from cooperation to competition but, for legitimacy reasons and out of a genuine desire to de-escalate the conflict, behaved as if cooperation was still happening. Once others in the organisation caught up with the realisation things were not working, and why, this situation could change. *The learning for me was that I tried too hard, too long, to be too reasonable. And there's only so many coffees you can take people out*

for (Elizabeth). Timing was mentioned often as something that had to be just right before effective action could legitimately be taken.

We've actually got somebody trying to set up and divide... parents, board, etcetera. If you acknowledge that too early, it can all [blow up, physical gesture]... HOW on earth do you bring it back from there? (Belinda)

From a practical viewpoint, these shared observations about timing are noteworthy when put together with predominant advice recommending early action to avert conflict.

The transition to a contest mindset suggests a contributing factor in why nonprofit organisations may flounder when expected to navigate schismatic conflict. In schism, people's capacity for cooperative conflict resolution dissipates, but mechanisms for competitive conflict resolution are not always available nor perceived as legitimate. Resolving problems cooperatively is aligned with nonprofit values and practice. Organisations underpin their procedures with the values and the conditions they expect to prevail. These include a win-win approach, trust amongst members, positive regard, open communication, fair and transparent process, and objective leaders in control of the situation. These assumptions simply do not hold true during schism.

Factions in the study contested over what the issues were, what resolution process should be used, what the outcomes should be, and who should decide. They contested the meaning of events, right and wrong, good and bad, and to reify worldviews. Ultimately, they contested for power. Schismatic conflict is not merely an extreme example of tension or everyday conflict but evinces fundamentally different conditions of engagement. By extension, flexibility in conflict management has the potential to improve its effectiveness. All schism literature includes reference to conflict in some form. In a minor deviation from the literature, for the sake of precision, the label contest has been chosen for the fourth definitional element of schism.

This chapter has so far introduced the proposed new definition. Each of the four definitional elements: worldview impingement, transformation, factionalisation, and contest, have been discussed in the frame of existing literature and illustrated by data. The remainder of the chapter

discusses the advantages of the proposed new definition over existing definitions, maps the new definition onto the six core literature models, and demonstrates how the proposed definition may be used to identify episodes of schism and distinguish schism from other social processes.

Case for New Definition Over Existing Definitions

A new definition emerged from this research by observing the lived experience of schism, and then developing a definition to fit. This section argues the proposed new definition is a conceptual advance on any single or compiled definition in the literature, and is more fitting and more useful than a linear process and/or mass-exit definition of schism.

Case for Proposed New Definition Over Linear Process Definition. As part of early model development, attempts were made to organise and refine terms used to describe temporally ordered parts of a linear process model of schism. Problems surfaced during the review of the literature, and multiplied once data analysis began. Terms were needed to describe underlying conditions or contextual factors, which triggered, caused, or were associated or correlated with schism incidence. During episodes of schism there were escalations, triggering events, turning points, points of no return, and actions to de-escalate. Resolution, climax, end, societal breakdown, reintegration, dissonant harmony, formal separation, and mass exit were all terms used to indicate the end of a schism episode. Language was needed to differentiate before, during, and after the schism, and how the group transitioned between these states. These terms and concepts were rarely defined, or distinguished from each other, and were inconsistent across literature models.

The most obvious problem was that an event or contextual factor which may be identified as a “trigger” in one context (e.g., change of leader), could also be observed in the data in different stage-of-schism categories, such as “turning point” or “outcome.” It seemed meaningless, moreover, to add “change of leader” to every stage-of-schism category. In the shift from a linear model to the new definition, “change of leader” is reframed as an event or contextual factor affecting social dynamics in the group (this concept is discussed more fully in Chapter 5, Human Needs).

Stage-of-schism categories were also hard to pin down. Not all schisms followed the same pattern of one-way escalation, and imposing a structure that only fit some data just seemed wrong (the theory should fit the data, not the other way round). Even if an argument could be made that all schisms follow the same general pattern, the apparent start, turning, and end points were often only recognised retrospectively, and the narrative of “what happened?” was socially constructed and highly contested. The concept of objectively describing the events and contextual factors driving the schism was highly questionable. A shift from linearity to complexity collapsed all the temporally dependent steps and stages of the linear process: they are all moments shaping the progression of a schism.

In other words, any event or contextual factor can affect the construction of a schism, regardless of what the event or contextual factor is, or when it occurs—if it affects the social dynamics in the system. The research question “What contexts, social dynamics, and characteristics (elements) do schisms have in common?” was thereby sharpened to “What social dynamics define a social system in schism?” In answer, emerging from data, was worldview impingement, transformation, factionalisation, and contest, named as the definitional elements of schism.

Making this argument does not mean eschewing terms which can help explain the incidence and progression of schism. Words like “trigger” or “underlying cause” may not be necessary to define a social system in schism, but are still useful because people experience events temporally, express their experience in a narrative, and feel a need to assign cause and effect. They are still needed to talk about schism, but they are unnecessary complications in a definition of schism.

Applying the lens of the new definition, underlying causes, for example, are the definitional elements substantially developed before the schism episode is triggered. The trigger affects the system such that the last of the four elements becomes sufficiently developed, and schism can be identified. Escalating events reinforce dynamics between the elements and drive progression of the schism. A point of no return could represent the locking in of a particular social dynamic such that

some possible outcomes are eliminated. It is characteristic of a complex system, that once an action occurs, the system may not be restored exactly the way it was (Uhl-Bien et al., 2007).

Using the new definition, the emphasis is on social dynamics—worldview impingement, transformation, factionalisation, and contest—and not on particular circumstances or events. A critique is made in this thesis that too much research attention is paid to identifying particular events and contextual factors associated with schism incidence. It may be important, however, to identify the types of events which cause the biggest perturbations to social dynamics, and whether those events are more likely to lead to escalation or de-escalation of schism. The capacity to perturb social dynamics is necessary for transformation, and knowledge of such associations helps people be alert to potential schismatic effects on their group. The new definition provides a novel perspective from which to approach such research, and suggests looking at factors and relationships other than direct event–schism associations, which has been minimally successful to date.

In summary, the proposed new definition is an advance on a linear group process model of schism for several reasons. First, the new definition focuses on social dynamics, not events and contextual factors. This shift explains discrepancies in the current literature about what triggers schism, what contexts are conducive to schism, and why events and contextual factors can have different effects on different social systems (or the same social system at a different time).

Second, the new definition is a simpler representation than treating underlying causes, triggering events, and escalating factors as fundamentally different stages of a linear process. Representing the process of schism construction as continuous, iterative, and complex, creates a better fit with lived experience data.

Third, the new definition takes advantage of a complexity framework when considering causation. Complexity unlocks the single-factor causal assumption, and the notion that schism is constructed moving only forwards in time, both of which are implied by linearity. Each of the definitional elements is developing in interaction with the other elements. They are not simply existing or not existing, not simply cause or effect. Complex interactions between the elements can

explain why schism can occur sometimes and not others, or can escalate or de-escalate, even when events and contextual factors are similar. Complexity can also explain multiple, contested, and retrospective constructions of a schism narrative.

This section has argued that a definition based on complex social dynamics is an advance on a linear process model. Next, an argument is made that the proposed new definition is more accurate and useful for determining cases of schism, and for characterising the end of a schism episode, than a mass-exit definition of schism.

Case for Proposed New Definition over Mass-Exit Definition of Schism. There is a lack of conceptual clarity between schism outcomes, transformational change, the end of a schism, mass exit, and schism itself. This research shows these are all separate concepts and should not be conflated, even if their occurrence can appear temporally ordered or even concurrent. Outcomes are considered here as the multiple consequences of schism, which may be observed or judged at any time including during the process of schism (e.g., loss of trustful relationships, ill health, individual exit). Transformational change is a possible outcome and so is reinforcement of the status quo. Mass exit is a possible outcome of schism, but it does not define schism. A schism ends when one of the four definitional elements is no longer present. The waning or disappearance of one or more elements may come about via mass exit, but the exit does not define the end of the schism. Rather exit signals the end of factionalisation and contest, which does define the end. In the context of developing a definition, the lack of clarity about the role of mass exit in schism is particularly problematic since it results in the misclassification of schism cases: specifically the exclusion of legitimate schism cases on the basis of no mass exit.

To illustrate the difference, in a multiple case study, Dyck and Starke (1999) found 11 of 14 groups went through conflict which ended in mass exit and new group formation, and the others went through a similar conflict but did not split and restored “dissonant harmony.” The authors treated the two sets of cases as having experienced a different phenomenon, based on the two types of outcomes. This is consistent with applying a mass-exit definition of schism, had they used

the same terminology as this thesis. Participant lived experiences were similar, however, with small distinctions affecting outcomes. Given schism can occur over years it was also possible mass exit occurred after the study concluded. The proposed new definition would classify all 14 cases as schism, based on the presence of the four definitional elements. The three cases where dissonant harmony was restored would be characterised as averted *mass exits*, not as averted *schisms*.

The new definition privileges lived experience over an event to define what a schism is. There is no intrinsic reason why this must be so. However, neither are there convincing arguments in the literature for mass exit as a definition of schism; most often it is simply stated. There are a number of reasons for using the proposed new definition over a mass-exit definition.

First, schism literature in anthropology does not assume a mass-exit definition. Bateson (1935) refers to system breakdown and Turner (1980) to reintegration or recognition of schism. The main contrast between anthropology and organisation studies or social psychology is the nature of the social systems they are studying. It is harder to leave a society or nation state and start a new one, than to exit a group or organisation and start a new one. Assuming all authors are researching the same phenomenon, a definition that can generalise across disciplines is more valuable.

Second, leaving an organisation incurs exit costs and there are limits to exit options. Factions, or subgroups with schismatic intent, also have different degrees of internal unity and shared purpose. These factors affect whether mass exit or any exit is a possible outcome of schism. Adam started a small school with a breakaway group of parents, with no money, about 30 years ago but *it's really hard to start new schools up now, because... where do you get the money from?...* *Unless you have, probably, half a million dollars sitting there (Carmen)*. People seeking to leave an organisation in a small country town do not have the same options to join alternate groups as people in the city. In the research data mass exits did occur, but in various ways including expulsion, righteous anger, deliberate alienation, and to save face, and only two participants related stories where new groups were started (one successful, one unsuccessful). Other exit or schism-ending scenarios were just as common, including scapegoating, individual exit, managing out,

marginalisation, gradual withdrawal, intractable conflict, and reintegration. A definition that accounts for different exit costs, options, and outcomes without introducing contingencies is stronger, more flexible, and more generalisable.

Third, schism is a social process which occurs over time. If it is defined by a schism-ending event (e.g., mass exit) or by the final state of the system (e.g., new group formation), a conflict which appears schismatic cannot be formally defined as schism until the exit or end state occurs. A definition that can identify schism in progress is more practical for research and practice.

Fourth, a mass-exit definition introduces normative biases, most obviously that unity is usually considered positive and schism negative. These biases are heuristic, and affect the way researchers frame questions, design research, and draw conclusions. The new definition does not assume the goal of intervention in schism is to encourage a particular outcome (e.g., avert mass exit). Rather it assumes the goal is expanded agency and improved control over multiple outcomes.

Fifth, the proposed new definition is ontologically misaligned with any definition variant involving a linear process or mass exit. In some instances, therefore, the definitions will not agree whether or not a situation should be defined as a case of schism. The new definition creates a larger set of schism cases including cases where mass exit does happen, as well as cases where it does not happen (or has not happened yet). More inclusive classification criteria are useful for comparative research, given there is interest in knowing how to affect schism incidence and outcomes.

Finally, philosophically, schism is human, social, processual, constructive of reality, contextualised, and complex. A mass exit is an event marking a stage in a process of schism. For many participants, when formal separation did occur, this was not even the most memorable part of the experience. A definition which reflects the nature of the phenomenon is more fitting.

Mapping to Literature Models. The new definition is put forward as an advance on linear process and mass-exit definitions of schism. It is a novel contribution to schism literature. It was stated earlier, however, that none of the six core models reviewed should be disregarded. They each offer important understandings, and are valid depictions of schism, as observed within the context

they were developed in. The proposed new definition may be mapped to the literature models, as shown in Table 10.

Table 10 Six Core Literature Conceptualisations Mapped to Proposed New Definition

Author Brief Summary of Conceptualisation	Worldview Impingement	Transformation	Factionalisation	Contest
Bateson (1935) Subcultures exist in dynamic equilibrium until interactions escalate or distort and if not restrained lead to hostility and system breakdown.	Loss of reciprocity	System breakdown	Subcultures pre-existing	Symmetrical or complementary schismogenesis
Turner (1980) Social dramas occur in societies, following a process of public breach of a norm, crisis, redress, and either reintegration or recognition of schism.	Public breach of social norm	New systems of redress or distribution of power via liminal state	Constructed from underlying divisions following breach	Societal norms or structure
Balser (1997) External factors act as a source of internal tension, creating conflict, factionalisation, and schism.	External, internal tensions	Group split, plus specific to case, e.g., change of leader, membership criteria	Process of differentiation of goals and beliefs	Purpose and control of organisation
Dyck & Starke (1999) Process model with six stages: relative harmony, idea development, change, resistance, intense conflict, and exit. Each stage progresses to the next through a catalysing or trigger event.	New ideas, frustrated change efforts, resistance to change	Group split and formation of new group with new identity	Change group develops separate identity, status quo group develops identity after alarm event	Strategy, governance, or doctrine
Sani (2008) Change to group norm causes members to perceive group identity being subverted. Increased schismatic intention through lowered identification, and sense of entitativity.	Perception of identity subversion	Identity change and group split	Change and status quo proponents, in response to identity issue	Who are we? What should we be?
Hart & Van Vugt (2006) Faultlines predict the makeup of groups after fission, but conflict is a necessary trigger.	Free-riding	Change in group identity due to loss of like-minded members	Based on faultlines, activated by conflict	Equity and justice

The purpose of mapping is to check whether there are fundamental differences between the literature models and the new definition which have not been explained. As can be seen in Table 10, if each author's research is considered through the lens of the new definition, there do not appear to be any irreconcilable differences. A caveat to this is whether or not it can be accepted that a schism does not have to include mass exit (or new group formation). In each of the literature models, all four definitional elements of the proposed definition can be identified. This mapping therefore supports the presumption that each of these authors, despite differences in the way their ideas are presented, is studying the same social phenomenon—schism. The next section argues that schism is indeed a unique and identifiable social phenomenon, and that the proposed new definition can distinguish episodes of schism from other social phenomena.

Proposed New Definition Identifies and Distinguishes Schism

An important function of a definition is to identify examples of the phenomenon it purports to define, reliably and readily. The new definition does so, as argued in the previous section. Moreover, a definition should be capable of distinguishing cases of the phenomenon of interest from cases of other social processes and phenomena, even those with significant similarities. The efficacy of the proposed definition for this purpose is demonstrated in Table 11. Questions about why a schism develops, rather than another social process, are reserved for LETS in Chapter 6. The definition's purpose here is just to identify which social processes are schism, on the basis of what makes schism distinctive, which is the concurrence of the four definitional elements.

Schism is the only process or phenomenon listed where all four elements are routinely present at the same time. This is a strong argument that schism is indeed a unique social phenomenon. Of the other scenarios, everyday conflict has the potential to become schismatic, especially if people perceive the conflict to involve a change which is significant to them. Intractable conflict can turn into active schism if the potential for transformation is unlocked. Change management is another situation with the potential to become schismatic because the presence of

transformation is inherent. Individual exit, marginalisation, and bullying are all situations where a significant change in relative power would be necessary to enable a contest, and thereby the possible conditions for schism (see Chapter 5). This is not impossible, as social movements and workers' unions, for example, have shown. Bullying remains a difficult situation in which to change power dynamics, as will be demonstrated in Willow's case below.

Table 11 Proposed New Definition Distinguishes Schism from Other Social Processes

Social Phenomenon or Process	Worldview Impingement	Transformation	Factionalisation	Contest
Schism	Yes	Yes	Yes	Yes
Change management	Sometimes	Yes	Possibly, or faultlines	Sometimes
Intractable conflict^a	Yes	No, or not yet	Yes	Locked in, may not be active
Everyday conflict^b	Sometimes	Not usually structural	Possibly	Possibly
Bullying	Yes	No	Possibly	No, power imbalance
Individual exit^c	Yes	No	Possibly, or faultlines	No, power imbalance
Marginalisation	Yes	No	Subculture, minority	Unlikely, power imbalance

^a (Fiol et al., 2009). ^b "Power is exercised within an agreed sense of the normal" (Haugaard, 2020, p. 43). ^c (Hirschman, 1974).

The capacity to distinguish cases of schism from other social phenomena is theoretically and practically valuable. The proposed new definition is simple to apply to a particular case—given a subjective assessment will always be necessary—and can identify cases of schism and cases that are not schism. As argued, the new definition has a distinct advantage over mass-exit definitions for identifying cases of schism where mass exit does not occur, and for identifying schism while it is still in progress. For researchers, it is important to be able to sample and compare details of schisms which, on the surface appear similar, but where outcomes are different, as noted by Balsler (1997)

and Dyck and Starke (1999). Action research on schism, and practical interventions designed specifically for schism, can occur if schism can be identified in progress, rather than retrospectively.

The new definition was used in the current research as a foundation for theory building and, pragmatically, to determine which cases in the data set were considered schism and not schism (as noted in Chapter 3). Neville's Story, explored in Chapter 6, shows how the proposed definition may be used to identify a case of schism. For comparison, two participant stories are outlined here to illustrate the straightforward application of the new definition for determining that a conflict situation is not a case of schism.

Tilly's regional church congregation had a protracted struggle with the diocese in Perth over control of assets bequeathed to them by a local member of their church. Factionalisation was present (local church vs. diocese). Contest was limited, however, by the power imbalance between the factions. Tilly's church committee was forced to conform to a process entirely controlled by the diocese. There was never any expectation on the part of Tilly's church that they could change (transform) the situation. They had to comply with what Tilly described as ridiculous, pedantic, and inefficient processes, designed to slow if not block their plans to utilise the assets. Tilly came to believe this process was deliberately slowed in order to trigger a time-limit clause which would revert the assets to the diocese. Worldview impingement was perceived by the regional church members but there was no threat perception on the part of the diocese. Tilly resigned her position on the committee. *I felt very much that it wasn't a Christian way to act.... I think it's about power and money.... It disillusioned me.* Tilly's situation appeared to represent the misuse of formal authority, marginalisation of the regional congregation, and individual exit, but not schism.

Willow's role at work was subordinate to a powerful department head, who was also influential on a nonprofit board where Willow served as treasurer. Willow's lived experience resonated with other participants in many respects: the sense of righteousness, injustice, and betrayal; being affected physically by putting on weight and not sleeping (*I was really stressed, I was*

losing my HAIR, that's why I wear fake hair, like, it hasn't come back); the escalation of stakes and tactics; and a perceived lack of options and powerlessness.

*Every avenue I explored, they basically said, "Are you sure you want to do this? 'Cause it will be a ton of s**t falling on your head. You will not have support".... So, what do you do? You can't do anything. And that's why the casuals never say anything either, they need their money. You know? They need their references.*

(Willow)

Applying the proposed new definition, Willow's situation was not schism, rather it may be classed as workplace bullying and individual exit. Willow never had public support within the perceived boundaries of the group. She had supporters including her husband, and work colleagues and board members who agreed with her and sympathised with her position, but none who were in a position to ally with her. Therefore, factionalisation was not present. Willow never got to the point of being able to contest her boss's power, despite exploring formal channels which were supposedly designed to balance power in such situations. Contest did occur, or at least resistance, but the power difference was too great to hold hope of victory. Transformation was not perceived as possible. The only element fully present was worldview impingement.

Summary of Proposed New Definition of Schism

In any academic discipline there is a conceptual vocabulary that goes with a paradigm or specific theory.... Definitions are not right or wrong.... What matters is internal consistency, usefulness, clarity and... the usefulness of the language game as a whole. (Haugaard, 2020, pp. 8–9)

This chapter described the development of a proposed new definition of schism in a social system. Schism is defined as a complex social process identified by the concurrence of four interacting elements: worldview impingement, transformation, factionalisation, and contest. The

new definition answers the research questions “What is a schism?” and “What contexts, social dynamics, and characteristics (elements) do schisms have in common?”

The new definition is more generalisable, clear, and useful than those currently available in the literature. It is simple, and straightforward to apply, yet it contains the requisite complexity to represent the complex phenomenon it defines. It fits the current research data and cases in the literature, and resolves inconsistencies between existing schism models. It provides identification of schism in the moment, which is advantageous compared to retrospective identification. It distinguishes cases of schism from alternate social processes of group development and conflict. The proposed new definition is novel, grounded in data, integrates existing knowledge, and is fitting for the phenomenon it defines.

The proposed new definition is a contribution to knowledge. Concepts have been carefully constructed for internal consistency, and therefore it provides a solid foundation for developing a lived experience theory of schism. Chapter 5 explores three themes emerging strongly from data: human needs, balance of power, and group leadership capacity. These themes, referred to hereafter as performative elements, generate capacity to explain and predict, as is characteristic of theory. The four definitional elements are integrated with the three performative elements to form LETS, a lived experience theory of schism, presented in Chapter 6.

Chapter 5 Performative Elements

Chapter 5 explores the research question “How do people feel, behave, make sense, and respond in schism?” Three themes emerging from the data demanded attention: human needs, balance of power, and group leadership capacity. These have been labelled *performative elements* and complement the four definitional elements presented in Chapter 4.

Use of the term *performativity* traces back to Austin (1962), author of *How to Do Things With Words*. Austin explains that under felicitous conditions—the right person in the right context—words can *do things*. Performativity has also been applied to knowledge production, actors constituting the self, and bringing theory into being (see Gond et al., 2016, for a review in the context of management and organisation). In this thesis, *performative* simply means these three elements *do things* to the schism. By observing the performative effects of these elements, and gaining insight into the how and why, human agency is facilitated.

The function of this extended chapter is to define, illustrate, and discuss the three performative elements, thus justifying their inclusion in a lived experience theory of schism. As in the previous chapter, the voices of participants are privileged in the presentation of these elements.

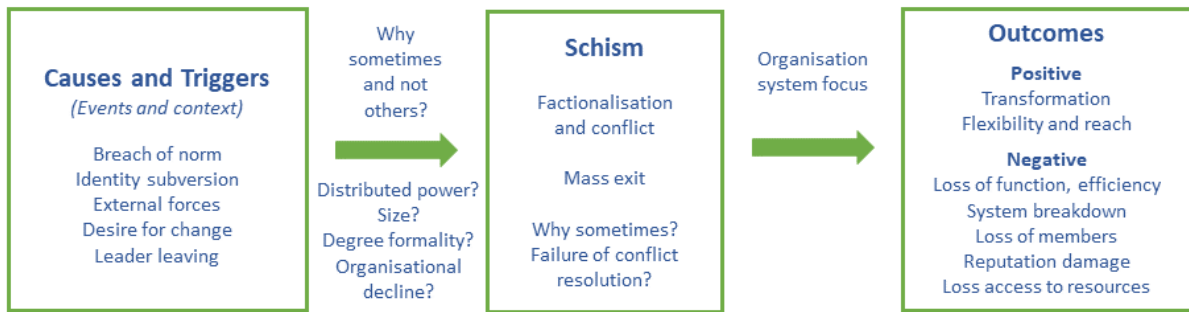
Human Needs

With a group of people, you like just to be accepted. (Tim)

The first performative element was identified based on the observation that people made sense of and responded to schism, both purposefully and instinctively, by seeking to meet what has been termed in this research *human needs*, which they experienced as threatened or unmet.

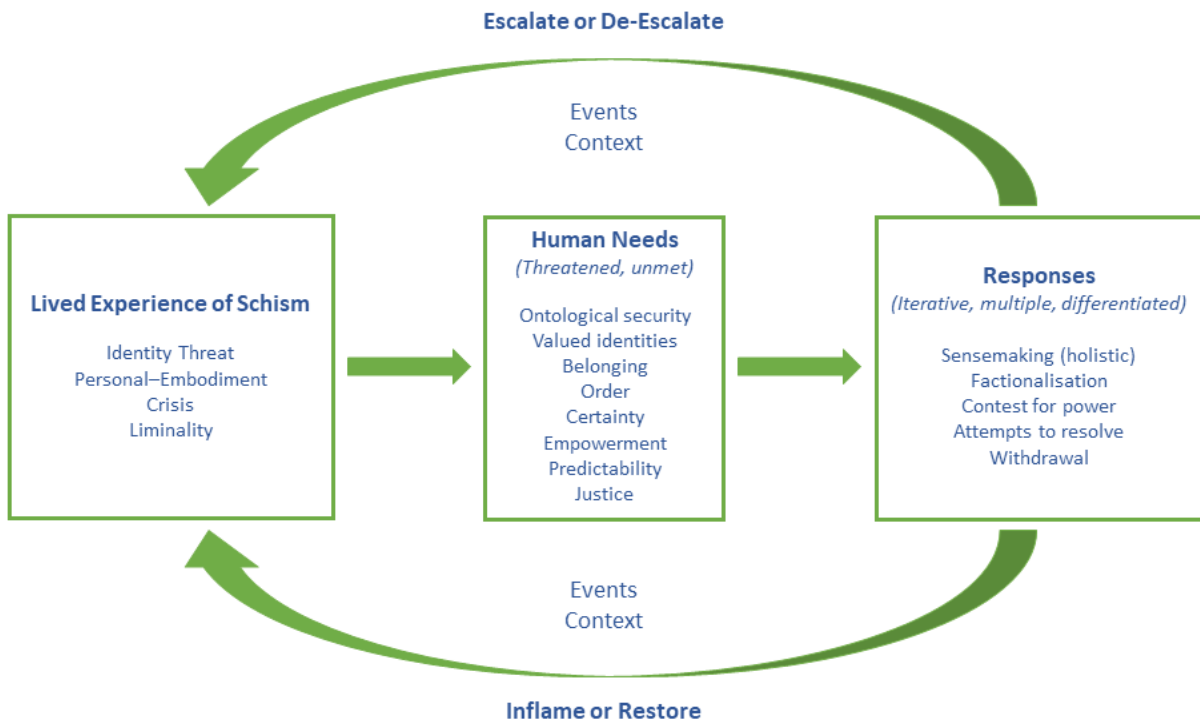
Existing research tends to focus on finding associations between schism context, events, incidence, and outcomes, but patterns have been hard to identify, and questions remain unanswered (see Figure 5).

Figure 5 Existing Research Focuses on Causes and Outcomes



Patterns began to emerge in the data when attention was given to the way people made sense of their experience, how they responded by trying to meet human needs, and how this in turn affected the social dynamics (see Figure 6). Cycles indicated are simplified depictions of the complex interactions observed. Iterations of lived experience→sensemaking→action→system response→lived experience provided multiple opportunities to inflame and escalate or restore and de-escalate.

Figure 6 Human Needs Central to Individual and System Response



From this perspective, schism is a delicate construction of human interaction reminiscent of the dynamic equilibrium of schismogenesis (Bateson, 1935), perhaps with a less bleak assessment of inevitability.

Note there is no intention to assign a normative valence to escalation or de-escalation of schism, to actions which—in retrospect—escalated or de-escalated schism, or to human intent to escalate or de-escalate schism. The same applies to inflaming and restoring. People may have good reasons to inflame people’s emotions and sense of right and wrong: to gather support to overthrow tyranny, perhaps. Escalation may make the schism mercifully short. The advantage of the representation is not to judge, but to increase the number of actions to choose from, while more accurately predicting system response, therefore maximising capacity to affect the system while minimising inadvertent and unwanted effects.

Conceptualising the dynamic as cyclical and iterative instead of linear, and driven by human needs instead of context and events, has three clear advantages. First, it makes for a better theory by removing contextual contingencies, making the theory simpler and more generalisable yet gaining a better fit with data. Second, it offers an explanation why associations found to date between schism and context and events are weak or nonexistent, by repositioning the performative link between schism and how people experience and make sense of context and events (see Figure 6). Third, it expands agency by making clear that schism is not directly predetermined by context or events, rather the dynamic is influenced by human interpretation, decision, and intervention.

On principle, I was... “This is outrageous... pay money to settle when we haven’t done anything wrong.” My chair... said, “Yeah, that’s disgraceful, we shouldn’t pay that.”
And suddenly I saw my opportunity going. I said, “No no, we should, we should [laugh].” (Elizabeth)

Some moments seemed more pivotal than others, and each participant described multiple turning points or points of no return.

Actually, there was a silence... while they decided what to do. (Hettie)

She... went suddenly... it was like this big... hole. (Linda)

That's what really kind of started the rot. (Harry)

There were steps taken to suspend him... Which he took offense to. (Shaun)

Suddenly, that put nerves around the board. (Isaac)

You get to that point when you think "I can't do this." (Anne)

In a nutshell, the situation just exploded. (Penelope)

Conceptualising schism as a delicate balance of complex interactions between multiple people, and their actions and responses in a particular context, can help explain why schisms progress differently, even though larger observable and measurable factors may be similar. This section explores how human needs were observed to have a performative effect on schism, through four lenses emerging from the data: identity threat, personal–embodiment, crisis, and liminality.

Identity Threat

Identity threat was, predictably, a strong emerging theme. Identity is prominent in literature as a cause or trigger of schism, for example, change ideation (Dyck & Starke, 1999), perception of identity subversion (Kreiner et al., 2015; Sani, 2008), changes when a founder leaves (Balser & Carmin, 2009), or a public breach of a group norm (Turner, 1980). Social identity theory, introduced in Chapter 2, is a versatile lens for understanding responses in schism.

Identity threats identified in the data included personal attacks on proficiency, ethics, or commitment to the group; devalued skills, experience, or values; devalued historical contribution; threatened role, influence, power, or livelihood; exclusion or marginalisation; changing direction of activities, mission, size, or values of a group; changed or weaponised governance; and threat of organisational demise. The origin or type of threat did not shape participant responses as much as the value of that identity, the cost of exit, the availability of substitute identities, and social support.

Responses to Identity Threat. Participants were motivated to defend personal, social, and organisational identities they perceived to be threatened. Responses to identity threat highlighted human needs for belonging, affirmation, self-determination, and ontological security. Defensive or protective responses included searching out allies, justifying a position, counterattack, and threatening exit or expulsion. These responses often escalated schism by inducing a threat response in others and by promoting factionalisation. Participants were able to articulate this need for social support and belonging.

When the relationships within that group are strong and powerful, it becomes a magnet for others. "I want to be part of that... I want to have that feeling"... It's social... it's people, human beings, wanting that tight connection with another person... They will act outside the norm... in the desire to belong. Well, I think that's how factions form. (Olivia)

Factionalisation met participants' human needs for belonging to a like-minded group, affirmation of their value as a member and of their worldview, and the opportunity for shared sensemaking. Power of numbers enabled them to contest the future of the group, meeting needs to be self-determining and empowered. Factional contests were described by most participants, and escalation and resolution of schism was often played out, in public, at large whole group meetings. Data supported the premise a socially supported identity (e.g., through factionalisation) is more likely to be defended as opposed to being altered or exited (Petriglieri, 2011).

The data contained several instances where a new leader's response to being undermined was to defend their leader identity by accentuating its primacy and continuing to enact it—*It's quite shattering and it's really hard to keep yourself together (Anne)*—until they had built the respect and trust they felt they needed (identities are socially legitimised, Haugaard, 2020). They used a broad set of strategies to defend their leader identity, up to and including *managing out* oppositional members of staff. In most cases, but not all, it eventually led to the leader prevailing in the schism

contest, feeling satisfied with the outcomes for the organisation, but at personal cost since other identities were placed to the side.

Participants described identity-restructuring as well as identity-protection responses (Petriglieri, 2011). People altered the meaning of identities, changed their relative value, and even exited a group to which their identity was tied. It is hard to know how an early exit may have affected a schism except through speculation in retrospect, for example, early exit could be a turning point. Exit often marked the climax or resolution of a schism, or occurred later as people realised their identity had lost value. When they were marginalised or shunned by the group, for example, the identity no longer met needs for feeling valued or for belonging. Some exits were not by choice.

It was commonly expressed that by the time the schism had fully developed, all parties expected one faction would leave the group. Identity exit very often seemed the only option to resolve the schism. *If he had chosen to stay, I would have gone. It wasn't an empty threat (Isaac).* But people were prepared to contest who should make this sacrifice. Exiting an identity came at high cost to participants, perceived as greater when exit was forced. Exit costs were often, but not always, higher than the cost of swallowing pride. Tim endured a vote of no confidence in his presidency. *I felt devastated.... To be criticised for trying to do the right thing, was really hard to take. And if I could've walked away, I would have walked away (Tim).*

On the other hand, when Adam and a group of parents left their existing school to start a new school, they had a new, high-value, engaging identity to substitute for the identity they exited. Further, before the whole group meeting where *it all came out*, and the idea for the new school was born, Adam had internally devalued his identity as a teacher at that particular school and was planning to walk away. *I have no hard feelings actually.... To get it to happen, you had to look forward and look, to be honest, what did I have to lose? Nothing! (Adam).*

Leader Identities. Protective responses to identity threat often meant neither faction was in the position to create a cooperative conflict resolution space. *She started NOT responding as the president but responding as... a person being attacked (Penelope).* Why people felt threatened was

one thing, but the fact they did feel threatened affected their capacity to respond creatively and cooperatively as a member of the superordinate group.

A fair and effective conflict resolution process was described by participants only when formal leaders of the group were able to maintain their leader identity, and this did not always happen. *Rogue* committees were more common than expected. Even when leaders maintained fair and transparent processes, this did not preclude other people acting unethically. Process perceived as fair seemed to make a difference in minimising escalation and inflammation, and vice versa.

Several stories of maintaining a leader identity in difficult circumstances reflected courage and grace, as personal attacks were absorbed. Belinda was employed as a new principal to rescue a school which had struggled with leaders and student numbers for some time. In a mirror of Elizabeth's circumstances, Belinda was appointed over an insider who aspired to the position, who then proceeded to undermine her. *While they go "ppssch" [explosion sound]... you've gotta bring it all back together (Belinda)*. Belinda stressed the importance of not taking it personally and always having respect for that person's *dignity*, then seemed to surprise herself with sudden tears when she wondered if they considered her feelings in the same way. A deep breath and she recovered her leader persona. *You'll do ANYTHING.... You've got to be the strong one... The leader (Belinda)*.

Leaders—and leader roles—were common targets of identity threat. Leaders often symbolised or personified the group. They variously represented the status quo or imposed change and were seen as the source of threat. People in leader roles also had access to resources of power, through formal authority, agenda setting, control of communication, and capacity to force exit of opponents, for example. Preferential access to resources of power made contesting for those positions worthwhile, often through nomination to a committee. Empowerment and self-determination were human needs which were, unsurprisingly, observed to escalate contestation.

Identities are Valued. Identity threats could appear to be directed at individuals, subgroups, organisations, or the nonprofit sector itself, but importantly it was always human beings who perceived threat. Sometimes that meant collectively. Systemic change in the nonprofit sector—

especially becoming more business-like or corporate—was mentioned by a number of participants. Ryan identified as a nonprofit manager who valued *soft skills*. He perceived his value in the sector being undermined because this was increasingly interpreted as not being *aggressive enough*, *assertive enough*. On top of that, he did not *have an MBA*, which seemed to him to be valued over his clinician qualifications, practical knowledge, and sector ethos. On another level, Ryan questioned the direction he believed the sector is taking, as did several participants. Ryan is one who managed to create a local workaround, but as a member of a dispersed collective—not an organised faction—he did not express awareness of any agency to contest change at sector level.

Ultimately... [the] not-for-profit space has a real question to ask of itself. As in how do we do this in such a way as to stay true to our values.... We can learn heaps from business practices, but it's just about how that sits within the space. (Ryan)

Participant roles in organisations were more than transactional, rational, or functional. People who were involved with a club or organisation for a long time developed highly valued social identities dependent on this association. Volunteers who contributed to a club expressed a human need for that contribution to be valued. Self-realisation could be tied up with an organisational role.

It was always a personal dream, to run my own school.... I was very involved with it for a long, long time.... I was not—not happy to leave like that. You know, those—those—those dreams that you have... kind of shattered. And you walk away, and you know... years down the track, nobody'll know who you are. (Anne)

Over and above identifying with an organisation, participants expressed a need for respect and appreciation, and simply to be liked as a human being. *It was miserable... I would say there were a few tears. Um, quite a bit of self-doubt (Elizabeth)*. To sum up, human needs were fulfilled through social identities created by being part of a group. Protecting those identities sometimes contributed to the escalation or inflammation of schism, and at other times enacting them with integrity could lead an organisation out of schism. Restructuring identities helped people manage loss and distress.

Personal–Embodiment

I think that's the part that people don't realise, that in a conflict like that... somebody gets hurt. (Olivia)

Schism has many challenges, and emerging strongly from the data was the observation that meeting those challenges was made more difficult simply because people's holistic well-being was affected. The personal–embodiment lens has two aspects. The first is personalisation. Conflict was experienced as personal, both the source and the target. *I don't wish to dramatise it, but I was under attack from the Coopers, basically (Cam)*. The experience of schism affected people on a personal level.

It just ground her down. It was impacting her health. She said it was impacting her personal life. It was consuming her.... That particular principal just lost all her confidence in being a school leader. And that's what's sad. (Carmen)

It is important to be explicit about this since it can be considered infelicitous to acknowledge the personal nature of conflict, especially in organisations (Pondy, 1992).

The second facet of this lens is embodiment. Participants understood and expressed their experience of conflict through physical manifestations of distress and through embodiment metaphors. This was a strong and somewhat surprising finding, that even though participants were involved in the conflict holistically, embodiment stood out. This section begins by illustrating the personal nature of schismatic conflict, how this affected the schism dynamic, and participant utilisation of sensemaking, before returning to data supporting the theme of embodiment.

Conflict is Personal. Conflict in schism was often personal, as opposed to issue based. *I've got a thousand strategies now, for group conflict, and how to try to manage that... but at the root of it all, it's personal. People take things personally (Olivia)*. It appeared people in schism endured various degrees of personal distress. *It's WRONG, what they're doing is WRONG (Deborah)*. Personal distress was not a favourable state of being for resolving problems creatively, being empathetic to others' needs, nor confining tactics and strategy to ethical behaviour or fair process. Groups did have, and

use, governance processes to facilitate their commitment to *safe meeting practices, attacking the issue, not the person (Jane)*. Despite this, people felt personally attacked, vulnerable, and suffered personal loss.

Formal processes and cultural norms did not always guarantee behaviour. *This poor woman, she was—when I say defenceless—she was! He was bl**dy eyeball to eyeball with her (Owen)*.

People actively upholding processes and values was what made them meaningful. Several people commented that, in the moment, for whatever reason—surprise, self-protection, indecision—no one stepped forward.

I've rarely seen a director stand up... There'd be times when Elizabeth was getting pilloried in a meeting.... Instead of calling the bad behaviour, they just put their head down and look around the room. (Isaac)

Data indicated a human need to feel safe and secure, which was not being met in schism. *The reaction of... anger, and anxiety.... I actually found her really frightening. I was SCARED... Might sound silly but I thought if she's able to be like this, what else could she do? (Deborah)*. People's perception of not being safe, and their defensive response, had potential to inflame and escalate schism. Withdrawal was also observed but did not tend to escalate—or resolve—the schism. Withdrawal was more indicative of individual exit from the group, acceptance of the situation, hoping someone else would fix it, or a temporary state until the person could perhaps think or feel differently. *People don't realise how much it can affect you, emotionally and mentally, and I just don't want anything to do with any groups (Ingrid)*. Schism was escalated when the response was to defend or counterattack, which was a common response because the conflict mattered to people. They dared to do things they would not ordinarily do. *I felt like a LION! (Deborah)*. Stakes were high. *It was my—it was everything (Linda)*. With factionalisation in play there also appeared to be an element of contagion (Goode, 1992). *People feed off whatever's going along (Anne)*.

Sensemaking. People went to considerable effort to make sense of the lived experience of schism—who was right and wrong, what was happening, what should happen, how important it was,

whose job it was to make it happen, and was it theirs? *I thought to myself... "What am I going to do here?" (Cam)*. Serious soul searching went into determining how committed they were to a fight; for some of them, this was not their first schism and they knew what they were committing to.

I think they were angry—that this was SO WRONG... You know that expression, in footy, "When it's your time to go, it's your time to go." You've got to put your head over the ball and you've just gotta do it.... And—they did. (Cam)

Having a plausible story was a way people regained a sense of certainty, control, and security, and understood their role. Participants expressed *feeling better* once they believed they knew what was happening, who their allies were, and what they were going to do. Cognition was apparent in the way people made sense of threatening, chaotic, and emerging situations. Cam used the phrase *I thought* 42 times during his interview.

I thought, "Wow, something's really fishy here".... I thought, "Well, okay, that's PROOF to me, that's proof to me".... I thought to myself, "Okay, I don't want Daniel as president".... I thought about doing it [copying unethical tactic], I thought, "No, I can't, I don't want to do that." (Cam)

In this short selection of recollected thoughts, Cam assessed a situation as potentially dangerous to him, turned suspicion into knowledge, decided the outcome he wanted, considered what actions to take, and confirmed his moral code. In doing this he engaged his intuition, knowledge, cognition, ethics, and identity. His sensemaking—his knowledge—was holistic. This research supports the potential of sensemaking (Weick et al., 2005) as a framework for studying the lived experience of schism, including strands of sensemaking research, discussed in Chapter 2, which explore the role of emotion and embodiment in sensemaking (Cunliffe & Coupland, 2012; De Rond et al., 2019; Hartmann & Weiss, 2017; Maitlis et al., 2013).

Conflict is Embodied. Embodiment stood out as one answer to the overarching research question "How do people understand and express their experience of schism?" Evidence for an

embodiment theme was explicit in stories, and implicit in small details people provided, the actions they took, and the language they used.

First, sensing and embodiment metaphors were used with surprising frequency. *It started to eat into me (Hettie)*. People *smelt a rat* or something *fishy*, *heard alarm bells*, *opened their eyes* to what was going on, *knew in their gut* it was the right thing to do, *lanced a boil*, *got stabbed in the back* or *blindsided*, *got knocked down* or *knocked back*, *stood up*, *put their foot down*, and got their *heart broken*. It seemed the schism context was a metaphorical assault.

There's an element on the board that wants my head. So that's quite distressing.... I have to deal with that EVERY SINGLE TIME I have an interaction with them... that these guys are looking to shoot me down. (Isaac)

Second, people enacted the schism in physical spaces and human bodies. *It still hurts today, to go past the school, I don't wanna go there. I don't—there are certain people I see, and I don't [pause]. It brings those feelings up (Anne)*. People *sat together* in factions at meetings. Territory and physical proximity had meaning and value. Secret meetings were held in people's houses. *If I was sitting in the room, [she] would come in and say, "I'm not sitting next to you." PUBLICLY (Elizabeth)*.

Third, people manifested their pain and stress in their physical bodies. This is not to say they became sick instead of feeling emotional or psychological pain, but that the physical manifestation was readily observed, and participants felt able to communicate it more precisely, concretely, or perhaps more convincingly. People related instances of *migraines*, *lost* or *gained weight*, *sleepless nights*, *teeth grinding*, *extended bouts of crying*, *a pounding heart* or *dry mouth*, and general illness. *Looking back, it affected my health.... I was getting round like a zombie (Hettie)*. Two male managers described collapsing at work and being rushed to hospital. *That was just a nightmare.... As much as I tried to manage it and manage it, and manage the stress, it was just... really horrible... It reached a tipping point for me (Isaac)*.

In summary, even when groups followed arguably fair processes, participants experienced schism as feeling under attack, often from specific individuals. People were physically, mentally, and

emotionally stressed, which affected their capacity to solve problems cooperatively. Participants did not agree about how to manage emotions or grievances in a group setting. When the schism was inflamed, however, it appeared counterproductive to deny that the conflict was personal, or to blithely implement governance processes without acknowledging people's feelings. Imposition of a process that did not "feel" fair induced a sense of powerlessness and was perceived as tantamount to coercion. People acting rigidly in a supposedly rational or technical way seemed just as much a barrier to resolution and future cooperation as people acting emotionally or instinctively.

Crisis

A sense of crisis being part of the lived experience of schism was an emerging theme, and crisis is a helpful lens for understanding the performative effect of human needs in schism. From a system view, crisis is characterised here as a change in the pattern of interactions: to their quantity, quality, or intensity, including step-level changes and turning points (Holsti, 1979). "Crisis interrupts, often dramatically, the supposed continuity and the apparently ordered, linear progress of organisational life" (Nash, 2013, p. 141). A common example in the data was the frequency and tone of communications, to the point of entirely consuming people's attention: the *secret meetings* and *flying emails (Philip)*.

From a human perspective, a situation is a crisis if the people responsible for managing it perceive it as one. Characteristics of crisis from an individual viewpoint include "*surprise, a high threat* to important values, and *short decision time*" (Holsti, 1979, p. 101). Managing crises is difficult and results in "relative degrees of success *and* failure" because of the "novelty, magnitude, and frequency of decisions, actions, and interactions" (Pearson & Clair, 1998, p. 67). The focus in this section is on human needs in crisis, and how people responding to meet those needs affected schism dynamics. To illustrate what in particular made some schisms feel particularly crisis-like, Elizabeth's reflection comparing two schisms is shared, before other participant experiences are used to add additional insight.

When and Why Does Schism Feel Like a Crisis? Elizabeth described two schisms in her first two years as CEO in a social service nonprofit organisation. The first schism, introduced in Chapter 4, came about when Elizabeth was appointed from outside the sector, over an existing member of the executive staff, the COO, who had expected to replace the outgoing founder. The COO (likely experiencing identity threat) mobilised support among senior executive and other staff to disrupt the appointment, undermining Elizabeth and her leadership with a personal and professional attack. Elizabeth tried improving the relationship and team building, but the situation worsened over many months, and was finally resolved by managing out the executive team, bar one. *I went to my HR Director, you can stop now, you're the only one left [laugh] (Elizabeth).*

The second schism was within the board as changes in organisational identity began to manifest. The organisation grew and professionalised, and demands on board members to have financial literacy and business knowledge dramatically increased. Elizabeth's reflections provide insight into what made the board schism feel more like a crisis—to her—than the staff schism.

I think the board felt more crisis because they acted in ways that could be sudden and unpredictable—fine one moment, dreadful the next—fine to my face, then secret board meetings... The staff issues were more predictable... and of course there was a process that was entirely within my control to manage it—as gruesome as it was.

The board stuff I felt was crisis because... NO work was being done.... They were so internally focused... You've got people who can't even talk to each other... undermining each other, not making any board decisions, not ensuring the CEO has ongoing employment.

Everyone was incredibly miserable.... It was like a real emotional drain. And time consuming as well.... It's like a black hole, it sucks everything into it.

And there was always a lot of last minute trying to negotiate... everything was like bated breath, crossed fingers... missed deadlines... opportunity costs... Money!! Paralysing... HUGE delays.

Yeah, it's extraordinary... and it sort of stays—stays with you a bit.

(Elizabeth)

Surprise, unpredictability, uncertainty, high stakes, increased frequency but decreased effectiveness of communication, poor decision making, decreased function of the organisation, wasted resources, emotional stress, being consumed by the situation, and distorted time perspective all characterised Elizabeth's lived experience, and resonate with characterisations of crisis in the literature (Holsti, 1979; Mumford et al., 2007; Nash, 2013; Pearson & Clair, 1998).

The core difference between the two schism situations, for Elizabeth, appeared to be power and control. In the staff schism, Elizabeth had hiring and firing authority, a legitimate Human Resource Management process to follow, and a Human Resources Director to carry it out. In the board schism, not only were board members almost impervious to being formally asked to leave, but they oversaw her position, and kept delaying her contract renewal, even changing her remuneration. The board crisis also impeded her capacity to enact her leader role in the organisation, by delaying large projects, distracting her attention, undermining her self-confidence, and using up time and energy—*It's busy enough doing the job anyway (Elizabeth)*.

It is worth noting that the experience of crisis was not necessarily common to everyone involved in the schism. Harry sat on this same board but shared none of Elizabeth's doubts about whether the schism would resolve in her favour nor about her future in the organisation. He was, due to a previous experience, concerned he would be scapegoated, an eventuality which was not on Elizabeth's radar. It can be speculated, even inferred from data, that the COO may have experienced the executive staff schism as a crisis, framed as subversion of organisational identity. Possible links between a human need for power and control, the current balance of power in the organisation, and who perceives a conflict as a crisis and who does not, is a potential topic for further research.

Human Needs and Responses in Crisis. Human needs not being met for Elizabeth included control (over her personal work situation and over enacting her role as CEO), order (and resultant productivity, including normal time horizons), certainty (*I actually started going and looking for other jobs at the time because I... felt really insecure*), predictability (about board responses to her initiatives and who she could count on as an ally), respite from emotional and mental stress, and the chance to work cooperatively with her board (an important value for her). This schism climaxed in an uncontrolled board walkout, where only three out of 12 directors remained.

Reflecting on the resolution of the staff schism, Elizabeth expressed feeling better when she was able to take action. Sensemaking reduced uncertainty and facilitated the capacity to act. Support was also a crucial factor, especially early on.

I had people... going, "You're doing the right thing, stick with it"... then I felt secure....

So, you take action and BANG.... The hardest step was the first one.... I just had to kind of plough through it. If I'd've doubted it was the right thing to do, or someone said, "Oh, no, I think you're being a bit... mean"... I would've stumbled a bit.

(Elizabeth)

The step of *managing out* was not a de-escalation of schism, a compromise, or a return to cooperative problem solving. Some members of the organisation were forced out to enable this resolution. For Elizabeth and, she believed, for the organisation it was a successful resolution. Things changed quickly for the better, she said, after the core of the opposing faction left. *The affirmation from other people who they worked with, you could see the mood LIFT (Elizabeth)*. Elizabeth's assessment was supported by Harry, her Human Resources Director, and Felicity, an Executive Assistant. *If we're going to make the break, let's make it quick (Felicity)*. Human needs were met through this resolution, and not just for Elizabeth. Certainty and order were restored for all the staff, arguably even those who left. *I think we all felt a little shaky there for a while. Watching where it was going, what that would mean for us.... During that period of time... everything was coloured with other people's pain (Felicity)*.

A Sense of Crisis was a Common Theme. Other participants described experiences characteristic of crisis, especially powerlessness, uncertainty, and a certain relentlessness or being all consumed. *I felt... helpless... I felt powerless. I spent all my time thinking about her. I couldn't get her out of my head [emotional] (Deborah).* The further the schism deepened and broadened and became about everything, not just one issue, the more complex and consuming it became. When surprising and often unwelcome events were happening quickly, continuously, concurrently, and unpredictably, this was experienced as distressing.

I'm sorry to go on, but there's so much! So much happened, you cannot believe.... people get, I think, get sick of me talking.... I've written a letter to them.... I would like them to say WHY we're being expelled. We don't know!... They called us "immoral and unethical".... There's that much you just don't know where to start. (Hettie)

The less people sensed or believed they had power over the situation, the more crisis-like it seemed to feel.

Existential threat to the organisation was experienced as a crisis in many groups, and often created a shared sense of urgency and a surge of engagement.

The club was in danger of fragmenting and, well, falling over in fact.... [An external facilitator] was called in to run an independent meeting, to air our grievances.... The whole club went. Yep. There was forty, all the members went. (Neville)

A sense of crisis, therefore, was not inherently negative. It served the purpose of mobilising collective effort to solve a serious group problem. It could have negative effects, however, on problem solving capacity of individuals and groups.

Holsti (1979) modelled the effects of cognitive stress in crisis on cognitive performance, and showed negative impacts on the ability to search for information, generate options, analyse and evaluate alternatives, and make decisions, and an increased probability of defensive avoidance. In other words, the normal human reaction to a sense of crisis is likely to exacerbate the crisis and

escalate schism. If, instead, the sense of crisis can be ameliorated, by meeting human needs for control, predictability, certainty, order, or perspective, for example, it may be possible to disrupt the escalation and inflammation of schism, gain some cooperation, make better decisions, and/or bring schism to a resolution.

Ameliorating Crisis-Like Conditions. Participants described alleviating a sense of crisis by reducing uncertainty, and increasing control. Sensemaking was often employed as a response. Even making a single decision about who to trust seemed to reduce uncertainty. On the other hand, the urge to make a decision—in order to reduce uncertainty—could lead to premature closure, especially about intangible things like other people’s character and motives, and could increase factionalisation and personalisation. As Finn intimated, in the Sporting Club 1 schism a decision was made about who could be trusted and who could not be trusted. This then dictated the range of solutions acceptable to each faction, reducing options to mutually exclusive ones.

They were setting an ultimatum.... “If Nick gets voted in, we’re all walking”... He looked me in the eye and he goes, “Do you have people to... fill the roles? ‘Cause if you don’t, then that’s it for the club.” (Cam)

The perceived need to increase control sometimes drove a contest for power, as it did in Sporting Club 1, and sometimes translated into actions which stabilised the group. Brian was able to reduce the sense of crisis at his school, induced by schism, leader change, and threat of the school’s demise. He used sensegiving—creating a narrative for the community—to de-emphasise the conflict; connect past, present, and future; and restore focus onto the school’s purpose and identity.

Given that numbers were tight, given that we still had the vision, the discourse that had to be applied was about the financial well-being of the school, and the school’s longevity, based on what our collective beliefs around student engagement and learning were. (Brian)

It still took five years to recover, but once the sense of crisis was alleviated, more energy was able to be applied to the rebuilding effort, and less to the conflict.

There is significant organisation studies literature on leading and sensemaking in crisis (e.g., Gilstrap et al., 2015; Mumford et al., 2007; Teo et al., 2017; Weick, 1988). This literature could be helpful for understanding leading in schismatic conditions but unfortunately when it comes to much crisis management literature, there tends to be an assumption of expert, central leadership with organisation-wide legitimacy, which is often not the case in schism.

Liminality

Liminal space is often described as a state of being betwixt and between (McCabe & Briody, 2016; Walker, 2019). “Crossing into a liminal space involves stepping over a boundary, a threshold, out of normal behaviour and into a highly charged emotional state which involves a trial, leading to either opportunity or irreparable failure” (Nash, 2013, p. 143). Turner brought attention to the concept of liminality in his social drama model (Turner, 1977, 1980). Liminality is closely associated with transformation, a definitional element in the proposed new definition of schism.

Notions of crossing a threshold into liminal space, transgressions that cannot be undone, breaches of norms (Turner, 1980), tipping points, points of no return, triggers to create step changes in conflict (Dyck & Starke, 1999), escalation, and schismogenesis (Bateson, 1935) are present in schism literature, and were characteristic of participant experiences. *For me, conflict is that ball rolling down the hill and once it hits the wall there's no return, it's broken, and there's no way of controlling [it] (Penelope).*

Disorientation of Liminal Space. Liminal space seemed to challenge human needs for ontological security, predictability, and justice. People found it more difficult to make changes or cooperate when they felt cut off from their past, the present was dynamic and confusing, and the future was unknown. Devaluing of a history that formed part of a person's social identity had the potential to engage emotions and raise the level of commitment to the contest. *It's not fair, it just*

wasn't right. How dare they?... They don't respect or care about the thing that we built. They don't have any empathy for the thing that they're ruining (Eli).

Participants remarked how *all of a sudden* they found themselves in schism. People found it disorienting to the point of ontological disruption when others behaved radically differently to their expectations—and this was extremely common.

Never would have in a million years worked out... that somebody would use that ten-dollar membership...and I'm... a hundred percent convinced that the Coopers paid all of the ten-dollar fees for their 15 or 20 friends.... that they got to come [and vote for them at the AGM]. Yeah, so for a couple hundred bucks you can buy a club. (Eli)

People perceived such actions as ethically illegitimate, even when the results of a vote were upheld, which they typically were. Perceived ethical breaches were especially unsettling when they were experienced as a personal betrayal or a rupture of organisational or sector identity.

I went in thinking it was going to be rainbows and unicorns, people in kaftans, you know, bit of Kumbaya, everyone just being super lovely to each other.... I was kind of caught unawares by this.... betrayal of the values. (Elizabeth)

Governance processes often broke down or were not designed for the novel, ambiguous, or complex situations people found themselves in. Echoing changes in society, a slow but profound transformation appeared to be underway in service clubs with traditionally male-only membership. Most clubs were embracing changes in membership criteria to include women, but not all individuals were. *He hated her. Simple as that... She was a woman, and she was the first... female chief that we had (Owen).* Karen compared the respect enjoyed by male members compared to women in her club. She was having a difficult time balancing her appreciation that men in the group needed a safe space, with the contribution she wanted to make and the respect she believed her efforts warranted. Clubs found themselves ill equipped.

There was [a meeting] when I was president.... Some of the ladies walked out at the end and said, "Old boys club's alive and well." It was horrible, and some of the other men spoke to me afterwards. They admired the fact that I just kept calm and didn't vent. But it shouldn't have happened.... But for all they've got a lot of formalities... it was scratching their head and saying what will we do about that? (Karen)

"Traditional machinery of conciliation or coercion may prove inadequate to cope with new types of issues and problems and new roles and statuses" (Turner, 1980, p. 152). When processes were subverted or not working to serve the group, this contributed to the sense of not knowing how to traverse the space. Whether to run things as normal, work strictly to the rules in the constitution, or to get an outside facilitator became another dimension of schism to contest. Justice and fairness of process were challenging ideas in schism, and liminality is a helpful lens for understanding why it seemed so difficult for a divided group to agree on a way to work through the conflict.

Creating Predictability in Liminal Space. Surprising actions, disruption, ambiguity, and flux reduced people's ability to predict cause-and-effect relationships. This contributed to disorientation, complexity, and ambiguity, as the contest spread into more and more aspects of organisational life, and competing narratives were constructed. It was usually unclear and a matter of contest what was happening, what should happen, and how. Criteria for judging right and wrong, and what was rational and irrational, were also matters for debate. Information was unevenly distributed, with varied interpretations. People used sensemaking to reduce ambiguity, but because the predictability of cause-and-effect relationships was low, this was short term and iterative, adjusted each time an interaction—a *skirmish or battle*—occurred.

Ambiguous contexts trigger sensemaking but are chronically hard to make sense of: cues are often unclear, actions muddy, and meanings equivocal. The relationship between actions and outcomes is also difficult to understand. (Maitlis & Christianson, 2014, p. 92)

A variation on sensemaking was the use of narrative and myth (Cunliffe & Coupland, 2012; Nash, 2013; Rhodes & Brown, 2005). When compared to sensemaking, the use of narrative facilitated the assignment of good and evil, of character archetypes, and of meaning and purpose.

If I was in their position, being presented with the information that was presented as hysterically as it was, I would've joined in with the hysteria. I would've grabbed the pitchfork and the torch that was being offered to me. (Van)

Narrative and myth also enabled people to project into the future, drawing on familiar storylines to predict possible outcomes, reducing uncertainty, threat perception, and disorientation. *It will all turn out in the end, the Emperor's New Clothes, and David and Goliath (never give up)* myths came up in multiple interviews. *It's the biggest cliché in the world, I actually think good will triumph... over evil [laugh]. I actually think it will. And that's that (Cam).* The retrospective version, *it all turned out for the best*, seemed to aid acceptance and healing.

It resulted in five people leaving, which in an organisation of only about 14 employees, it was pretty massive, but needless to say they had gone beyond being assets of any kind [laugh]. We survived. (Meredith)

People did what they could to reduce their sense of disorientation and discontinuity, by explaining people's behaviours in ways they understood, and by overlaying familiar narratives. In this way they met human needs for ontological security, predictability, and justice. Efforts to reduce the sense of disorientation in liminal space had mixed effects on schism dynamics, but some responses consistently escalated and inflamed schism. Contesting what would be a fair and effective way to resolve the conflict was fraught. A CEO imposing a process or solution once people were engaged was disempowering; even worse was denying there was a problem, described as an Emperor's New Clothes situation. A common act that escalated schism was making judgments and decisions for the purpose of reducing ambiguity (e.g., us and them, fixate on one solution, assume motives) and then transforming these decisions into knowledge used as a foundation for further sensemaking.

Human Needs in Schism

This research began with the assumption that people's lived experiences of schism were intrinsically important. A breakthrough insight, emerging from data, was that people's lived experiences powered schism dynamics in turn, and that understanding human needs in schism was the key to understanding patterns in schism progression. This data set is based on people's lived experience during active episodes of schism and has likely identified human needs that become salient in a situation of disorder, threat perception, and flux. Future research could explore whether different human needs become salient during periods of relative order—a need for change and the betterment of society, for example—which are also important for explaining schism.

Human needs and responses identified in this study are usefully considered through lenses of identity threat, personification and embodiment, crisis, and liminality. These topics have existing or nascent literatures, which is advantageous as they supplement the limited schism literature and connect the study of schism to other disciplines and topics including management of change, crisis, and conflict.

People in the study responded in similar ways to meet human needs, no matter the particulars of the threat. In cases where group leadership enabled human needs to be at least partially met, people reported feeling better and groups seemed better able to negotiate their way through schism. Human needs was named as a performative element of schism and incorporated into the developing theory.

Balance of Power

Power is to organization as oxygen is to breathing. (Clegg et al., 2006, p. 3)

Balance of power is included as a performative element because, in every schism in the study, people had a heightened awareness of power, worked to develop resources of power relative to their opposing faction, and exercised power in different ways compared to everyday organisational contexts. This focus on power appeared to be in response to three main things. First,

the sense of powerlessness discussed in the section on human needs. Second, awareness that the conflict was a contest which would be decided on the basis of power not argument. *It wasn't until I got home, that afternoon, that I realised... we've got seven. So, we've actually got the balance of power. So, there's five of them? That's fine (Dino)*. Third, heightened awareness that reified power structures and relationships were not fixed.

Members of groups constructed, distributed, leveraged, and enacted power and responsibility, and this facilitated the function (and dysfunction) of their organisation. What data showed to be distinct in schism was the degree to which power was both the objective and the determinant of the contest. Participants had an instinctive awareness of how power worked in their world. This section presents data using four lenses: narrative, organisation, righteousness, and legitimation, which illustrate people actively shifting the balance of power in their organisation.

Narrative

Truth... is the consequence of the struggles and tactics of power. This means the disqualification of certain knowledges as idiocy and a fight for others as truth.
(Haugaard, 1997, p. 68)

Narratives have been discussed so far as a way people understand and express their lived experience of the world, and how they orient themselves in liminal space. Sharing of narratives was also a way participants developed and exercised resources of power in schism. Narratives were a powerful recruiting tool, as well as necessary for faction solidarity and for developing strategy and goals. In schism, narratives were multiple and contested, and an important part of the contest to reify the worldview of one faction over another. Social actors have power when others confer the same meaning on objects, events, identities, or authority—narratives are powerful because they are shared (Haugaard, 2020).

Framing a Narrative. Factional narratives in schism were not necessarily directly opposed. Rather they were framed using different rationalities, values, and interpretation of events. Different framing made it possible for both factions to sincerely believe their position was the good and right

one, and that their narrative represented objective reality. The fundamentally different values, logics, or worldviews on which opposing narratives were built made schismatic conflict difficult to reconcile and more prone to escalation. *They weren't listening... they were very entrenched (Penelope)*. Contested narratives and factionalisation were mutually reinforcing.

People were aware of how a narrative would be interpreted; it had to be not only plausible but legitimate. *You can. You can twist what your argument is, to get more—to make it more palatable (Carmen)*. Faction motivations were not always the same as the public narrative. In fact, it was not unusual for different circles within the same faction to be privy to different versions of the narrative. At Sporting Club 1, members of the club who voted for Dino at the AGM did so in response to the argument he would make a better president because of his vision and longevity at the club. In the inner circle—those who nominated to be on the committee—the narrative also had a strong element of protecting Cam's role as club coach, and a deep distrust of the Coopers due to informal information they had gathered—gossip they did not share but which hardened their resistance.

Legitimising one narrative over another was as much about the storyteller as the story. *How did he get elected? He was able to... convince a lot of people.... He can talk. He's a very good talker (Dino)*. The legitimacy of the narrator was challenged as often as the narrative itself. This transference of attention from narrative to narrator had a dark side. A number of formal leaders told stories of being relentlessly undermined by gossip and lies.

I used to always call it historically "the attempted coup." And it intrigued me because it was actually really good learning about managing staff ever afterwards.... But it was SOUL destroying at the time.... In years to come I used to look at it and think I don't know how I survived that... But it's weird how you do. (Meredith)

A darker side of sensegiving was described in several stories, involving familiar strategies of post-truth persuasion, including misrepresentation, distraction, gaslighting, strawman arguments, and straight-out lying. *She didn't CARE whether things were true or not. She would just say them, and then everyone else would spend all their time and energy having to defend the truth (Deborah)*. This

was counter to what was perceived by participants as sensegiving with integrity and for a good purpose. As always, the technology of power itself has a nature neither good nor bad, rather how it was employed was interpreted as good or bad by people, depending on their perspective.

Communicating the Narrative. Control of channels of communication was both a resource of power and a way to construct power. Control of channels included formal communication within an organisation (e.g., newsletters, member email addresses), the authority to call meetings, the capacity to determine agendas, and what kinds of rationalities were favoured. The power to control these tended to lie with those in formal authority roles. Participants who related stories of people in positions of authority leveraging this power against them also described high levels of powerlessness, outrage, and perception of injustice.

We heard that they were actually giving away—before the last AGM—temporary membership to people. As long as they signed the proxy forms, and they didn't turn up at the meeting. They literally had armfuls of proxies. (Ingrid)

The nondominant faction was more likely to use alternative ways of communicating, out of necessity. These methods were often perceived as illegitimate, and the most common examples were secret meetings and gossip. *There is a network if you want to reach out.... It's unregulated, it's very unofficial (Glen).* The coincident necessity and illegitimacy of communicating unofficially, informally, or in secret created cognitive dissonance for some participants.

So, we did have a little secret meeting of our little cabal... I was uncomfortable with it, but I understood we needed to do it... When you are the person who gets ROLLED by a secret meeting... you feel like it's not FAIR. But, when you're having the secret meeting, you're thinking, "It's the only thing we can do." (Eli)

Communication between faction members was crucial because meaning, sense, strategy, and plans were all constructed in exchanges between human beings (Berger & Luckmann, 1966; Haugaard, 2020).

Narratives were also shared and constructed via public speech acts, especially at meetings. Meetings were a forum where factions intersected, evidence was gathered, knowledge constructed, and judgments made. Meetings formed a kind of anchor; they were shared events even though interpretations often differed, especially between factions. When the five participants from Sporting Club 1 were interviewed, stories varied quite dramatically but they intersected at important meetings. Everyone agreed the public testimony by Daniel that he would be president or nothing, and the AGM coup, were critical evidence for their shared narrative.

Narratives and Schism Dynamics. Contested narratives tended to promote factionalisation and vice versa. Narratives differentiated subgroups and enhanced perception of worldview impingement. Narratives were often used to rationalise and justify actions and outcomes. *The tactics can be justified by whether you win or not, and what your motives are.... I'm pretty happy with how we've written the history (Eli).* Rationalisations based on a faction's narrative expanded the range of strategies they considered, including breaching norms. This could escalate schism because opposing faction members were unlikely to validate the logic leading to the breach. Retrospectively constructing a shared narrative about what happened was easier when the key opposition players had left the organisation. *It's CONVENIENT for the ones who are left behind... to agree that the scapegoat was the problem... That's how they resolve it. Or they reconcile it. Not resolve (Harry).*

In those organisations which recovered well from schism, a common feature was leaders managing to create a shared narrative about what was important right now, and what steps they needed to take, linking past and future identities. Narratives had the capacity to unify and heal a community and provided an opportunity to learn. They enabled forgiveness and reintegration of members who had taken the “wrong” side. People were comforted to believe what they went through meant something. *So, without that kickstart it might not have happened.... Like I see it as... a gift... in some ways that whole situation created [our school] (Adam).*

In summary, narratives were most powerful when shared. This elevated the importance of narrators and channels of communication. Narratives served multiple purposes in schism including

rationalisation and justification of actions and the construction of identity and power. The contest to reify the worldview of one faction over the other was inextricably bound up with power.

Organisation

There is no reason why good cannot triumph as often as evil. The triumph of anything is a matter of organization. If there are such things as angels, I hope that they are organized along the lines of the Mafia. (Kurt Vonnegut, *The Sirens of Titan*)

In this section, use of the term *organisation*, referring to the common understanding of organising or being organised, is distinguished from formal organisation. As would be expected, well-organised factions in the study were better able to construct, legitimise, and utilise power. *Cam was worried, but Cam's not an organiser. Cam needed two things. He needed somebody else—that wasn't his mum—to organise on his behalf, and then he needed some loyal backing (Eli).*

Factional Organisation. Factions in this study were organised to a greater or lesser degree, but all developed some characteristics of formal organisation, as they became more separate and distinct from each other or from the superordinate group. Developing features of an organisation could be deliberate and collectively decided, but also happened organically as the situation evolved, needs changed, and as a result of individual actions. *At that moment, Dino—amazingly—put his hand up to be president (Cam).*

Having a leader, and other defined or implicit roles, was one way factions organised. Other characteristics of formal organisation developed by factions in the study included a shared narrative, shared history and identity, processes for making decisions as a group, communication channels and protocols, shared strategy and tactics, recruitment of faction members and supporters, and a shared commitment to a goal or purpose.

Jane was an informal leader of an environmental activist coalition. She ended her interview with *never say die... always do what is right... stick by what you really believe in, and hopefully justice will prevail*. But her coalition did not rely on such an outcome just happening, they got organised. They developed a flat leadership structure, so leaders could not be *picked off*. Decision making was

constantly monitored so all organisations in the coalition were included, and they kept a clear line of sight to their primary goal. Communication was constant: information campaigns, face-to-face strategy meetings, and super-fast communication via social media to put well-laid plans into action. Recruitment was planned, and volunteers had thousands of conversations with members of the public. One relative strength they had was large numbers of people in public places.

We had been planning against the bulldozing for a long time... we'd have thousands of people pledged.... When it came to the day and the callouts [went out] and the people came out. You know one day we had two thousand people turn up on site and it was just amazing. (Jane)

They leveraged expertise within the coalition, including urban planners, lawyers, academics specialising in the plants of the area, and Aboriginal elders cognizant of sites of cultural significance threatened by the construction.

As activists opposing the power of the state, in a fight often played out in the media, they were acutely aware of legitimacy. They strategised a social media campaign to combat *anti-development, unemployed hippies* rhetoric and maintained their core value of active nonviolence. *We had training every single weekend... little techniques to de-escalate.* They were aware of the potential for support or opposition from the general public who were soon to be voting in the upcoming state election. A change of government was the only realistic hope of stopping the destruction in the long term.

80–90 percent of police were fantastic... we saw them in tears at times.... [One young police officer laughed] "This is a protest? I'm used to having rocks and bottles thrown at me." There was just a couple that had that "us and them," "black and white" mentality. "We're the goodies, you must be the baddies." The contractors were harder to talk with. They saw it as money for them, their jobs... Our problem was with government directive, not with the workers, not with the police. (Jane)

Factionalisation. A crucial factor in the balance of power was faction numbers, especially in organisations where members voted on decisions, but also to provide legitimacy and confer a mandate to leaders. Recruiting supporters required organisation: a compelling narrative and narrator, strategy, good communication, personal history, loyalty, etc. Votes often decided battles and sometimes the war. Capacity to control who could vote, in what forum, and on what issues was a strategic resource of power. After being *rolled* by the coup at the AGM and losing the president vote, Cam's core supporters all *hopped on the committee.... That WORKED (Finn)*.

Identifying as a group or faction appeared to affect the degree of solidarity, communication, and coordinated strategy and goals. Until a collection of individuals identified as a faction, these elements of organisation were not as well developed. *At the AGM is when "we" became an "us" (Eli)*. This could have been a factor in Hettie's schism, where she bitterly resented being labelled as a group by the opposing faction. The excluded members largely acted independently. Hettie used a mixture of language: she saw her opponents as a "they" yet said "I" rather than "we" suggesting she felt isolated and a minimal sense of solidarity with other members who were also suspended. *They're postponing the meeting AGAIN—and I'm still suspended... it sort of knocks you down (Hettie)*.

As factions grew and their organising principles were further developed, in essence they duplicated—and differentiated—almost all the elements of a formal organisation. This duplication escalated schism by increasing the number of dimensions of the contest (e.g., who should be leader, what constituted the *good of the club*). Aspects of organisation designed to promote internal unity (e.g., culture, values, vision) heightened identification within factions and drove ingroup–outgroup differentiation, escalating schism.

Access of Factions to Existing Power Resources. Different factions were served by different forms of organising and had unequal access to existing organisational structures which confer power. This was most noticeable when one faction was perceived as representing the organisation (dominant group) and the other faction perceived as dissenters (nondominant group). The dominant group had preferential access to organisational structural power including formal authority;

decision-making; control of governance and conflict resolution processes; control of information, communication, and resources; and the capacity to control membership and voting status.

In the new constitution... they do not have to give a reason.... There was no rhyme or reason to not let these people in, who were really knowledgeable and well respected in the community... Except that they might have challenged their position there.

(Ken)

The power advantage was enhanced because organisational structure was not seen as specific to one faction, but belonging to everyone—inherently legitimate—the normal, proper, and fair way things are done. For example, dispute resolution was expected to follow existing governance structures, and votes were always upheld, regardless of circumstances.

All of a sudden, all these people started turning up. And I had never seen them before. Never. Ever.... And it was extremely official... if your name was NOT on the membership, YOU were not getting a vote. All these people, with... accents, same as the Coopers' accents, started to turn up.... Let's not beat around the bush... they all bought the vote. (Cam)

Occupying positions of formal authority wielded significant structural power, and this was reflected in the number of schisms which included contested elections at AGMs.

Nondominant groups in the study necessarily developed organisational elements differently. To shift the balance of power, they breached norms of behaviour which tended to favour those in authority and the status quo. They communicated via *gossip* and *secret meetings*. They were labelled *rebels*, *dissenters*, *resistors*, and *ring leaders*. They broke protocol, looked for *loopholes* in constitutions, and executed *coups*. They surprised people. Language tended to position the nondominant faction as illegitimate. People in positions of formal authority also called meetings at short notice, executed coups, and blocked discussion. They held exclusive meetings but the language—*confidentiality* or *in camera*—made them more legitimate.

*Management were excluded from the last three months of meetings, they were holding in camera sessions, after hours and all sorts of s**t, I have no idea cause they weren't minuted. (Isaac)*

Unethical motives and behaviours were attributed by participants to people with all degrees of formal authority. Participants instinctively distinguished between unethical, unconstitutional, and illegitimate tactics and strategy. Such assessments were nuanced and complicated and a source of contestation between factions, and even generated dissension within factions or cognitive dissonance for individuals. Informal communication or gossip, for example, could be seen as necessary or destructive, depending on perspective. Informal communication networks sometimes circumvented later issues. Shaun remarked that certain people were *known around town* and typically blocked from being elected to committees. Informal networks within his sport gave Cam forewarning to build support to contest the coup by the Coopers. Several leaders, however, reported rumours and gossip as destructive, difficult to address, and responsible for making their life miserable for an extended period. *The car park chatter? That's very undermining because you can SEE them out there chatting (Anne).*

While existing fields of power proscribed the power of the nondominant group, they also limited options of people in positions of formal authority, notably through subjectification or governmentalisation (Foucault, 1977; King, 2016; McHoul & Grace, 1993). Professional and leader identities imposed strong restraints on behaviour and strategy. Such limits also applied to the holders of the *high moral ground*. None of the participants in the study who identified as leaders or *the good faction* permitted themselves to take action that could not be rationalised as being congruent with this identity. *Your values are like your Achille's heel, it's your strength and your weakness (Quinn).*

Shifting Balance of Power in Schism. In schism—in liminal space—the taken-for-grantedness of organisational structure was challenged, including the distribution of power. Transformation was possible. Organisational structures normally favoured the dominant group, but in schism power

shifted to create a more even playing field. As a corollary, a nondominant group wanting to create change had a relative advantage in liminal space compared with stable periods. In the data, liminal space was often generated (perhaps inadvertently or unconsciously) to enable transformation: for example by undermining leaders, contesting leader roles, or challenging accepted ideas.

Transformation could also be an outcome of the disarray inherent in schism simply via opportunism (Klein, 2007). *I wasn't interested in the grief part... But... seizing innovation (Brian).*

These observations may contribute insight to speculation in the literature about why organisations with contested leadership or distributed power were found to experience schism more often than those with centralised power (Asal et al., 2012; Gamson, 1975). In contexts where formal authority and structure are overwhelmingly strong and stable, compared to the power of individuals or factions, this research suggests individual exit (or stay and resist or form a counterculture) is more likely to occur than schism. This was the case for Willow, whose situation was determined not to be schism (see Chapter 4). *I went to... a grievance resolution staff member... She basically said, "Well, you've got two options, you either LEAVE, or you put up with it" (Willow).* For incidence of schism, there needed to be—even the slightest—possibility that the balance of power could be shifted enough to make a contest possible.

In summary, when a faction developed aspects of organisation—leaders, communication protocols, identity, strategy, goals, and supporters—this increased their capacity to generate, access, and exercise resources of power. Developing organisational features further differentiated the faction from the superordinate group or opposing faction, thus deepening and widening the schism. Different types of factions had access to different resources of power. Access to structural power was an advantage usually afforded to those in formal authority. The nondominant group typically had to be more creative, and justify breaches of norms, to shift the balance of power. Reification was weakened in schism; disruption of formal structure and undermining of formal authority shifted the balance of power, creating opportunity for transformation.

Righteousness

A discussion of power would not be complete without trying to capture the intangible fire which seemed to provide participants with the energy, courage, and commitment to fight for what they thought was right. The label for this sub-element came from Eli's reaction when asked why he got involved in his schism experience. *Because we were RIGHTEOUS! (Eli)*

Righteousness was common to every participant's story of schism. Hettie said she was *devasted, totally gutted, frustrated—and the final thing, at the end of it, I suddenly got very angry at the injustice*. Things were *just not right, unfair, questionable, not on, galling, crazy, and outrageous*. People were described as *antagonistic, remorseless, stubborn, disgusting* and people felt *angry and shocked, angry and determined, angry and upset, hurt, used, betrayed, shattered, unappreciated, frustrated, resentful, disgusted, and disillusioned*.

Injustice and Powerlessness. Righteousness seemed to manifest when people perceived a sense of wrongness, judged according to their worldview and their personal, social, and professional identities, values, and norms. Deciding who had transgressed which norms, and which were the more relevant and meaningful, was a mighty struggle in itself. A mismatch between expectations and what was seen to be happening was a trigger for sensemaking (Weick et al., 2005). Sensemaking included moral judgment. People judged other people on what they said and did; stated and assumed intentions and goals; tactics and strategy; personal integrity and capability; and membership status. People found it particularly galling when they considered an offence had been committed against them by a perceived outsider.

I got this letter on Monday saying that I'd been suspended for causing an uproar [laugh]. And what else? "Traumatising our senior members!" And I'm the most senior member there.... Well!... They kept on saying, "We're worried that you're going to bring the [organisation] into disrepute" [bangs table]. I mean, I've been there 20 years! HE DIDN'T EVEN KNOW THAT. He didn't even know us. (Hettie)

Participants felt a heightened sense of injustice when combined with perceived powerlessness: when they were surprised, when they felt personally attacked, or when they were excluded from the group or from group decision making.

After a meeting that THEY held, that I WASN'T AT.... I was taken aside... "We think that maybe you need to take your long service leave." And I just went, no, this is not right. We don't want you to come back to teaching, we don't want YOU... we'll just SHIFT YOU ALONG. And I thought, well, that's just not fair. (Anne)

The Good of the Club. Shared righteousness was particularly observed in situations framed as a lack of altruism or loyalty to the group. *I did a bit of background checking, and I thought, "He's not right." He's not there for the right reasons. I mean, he wasn't thinking "club first" (Dino).* The *good of the club* was a universally valued maxim. It was rare when only one reason for entering a contest was salient, and core members of a faction may be privy to all the reasons, but when casting a wider net for support, *the good of the organisation* was almost always part of narrative construction, especially the public, palatable version. This is not to say its use was always Machiavellian, though sometimes it was. Rather, it aligned with the value people put on their membership, past contributions, and the perception of existential threat when the organisation was seen to be at risk.

I felt... frustration mostly... that a lot of our good work was being undone....

Disappointment, I think, on the attitude of a few of the people... it was all self-centred and not for the good of the organisation. (Shaun)

Righteousness and the Right Thing to Do. The imperative of maintaining *the high moral ground* (Belinda) often had the effect of supporting behaviour which adhered to cultural norms. This behaviour choice could be a combination of conscious strategy, to avoid giving the opposition ammunition, but also because it was part of a person's identity, perhaps as a leader or from a natural desire to do the right thing. "The desire to be reasonable constitutes an extraordinarily

constraining force in everyday interaction” (Haugaard, 2020, p. 82). There were multiple criteria for judging what was right, however, and strong motivation to interpret actions in a certain way. *I can't think of anything that she could've said that would've stopped people that were angry from thinking or TURNING whatever she said into something else, anyway (Felicity).*

When people acted within the letter of the law (e.g., technically complying with the constitution) but not in the spirit (e.g., according to tacit knowledge or social norms) this resulted in a short-term technical win but a long-term strategic loss—righteousness would still be the result. This observation reflected the tight connection observed between righteousness, norms and values, and the human need for justice which seemed heightened in liminal space, as previously mentioned. It was something people *felt in their gut was just wrong*, and could not be rationalised away by pointing to a clause in a constitution. *I mean, that stinks, doesn't it? It really stinks (Hettie).*

As well as encouraging normative behaviour in many instances, at other times righteousness had the opposite effect of enabling breaches. People feeling righteous found the energy and courage to fight and to persist. *Don't let anyone come and tell you that you can't do it. If it's right, just keep doing it (Jane).* People felt moral obligation. *His desire to see the right thing being done, just about outweighed his [laugh]... desire for a comfortable life (Elizabeth).* People feeling righteous were more likely to approach conflict; put themselves in the spotlight; nominate for a formal leader role; risk criticism, failure, reputation, or exclusion; and seek out others who felt the same way.

Righteousness, combined with a perception of threat to something of value, enabled people to make decisions based on *ends justifying means* moral reasoning. *I suppose I was pretty bloody-minded... but I was bloody-minded about it for the school's future (Brian).* A shared sense of righteousness was associated with shared commitment to action. *I think they embolden each other, for sure.... There was a lot of closed-door intense discussions and mutual support. "Am I right to do this?" "Yeah" kind of stuff (Harry).*

Righteousness Inflamed Schism. People feeling righteous were, almost by definition, inflamed, and the more people feeling this way, the more the collective experience of schism

became inflamed. Righteousness tended to escalate and inflame schism by enabling people to justify controversial actions in pursuit of valued ends. Righteousness heightened worldview impingement and drove the development of factionalisation. It provided factions with a uniting principle and aided recruitment.

In the human psyche, that wants to belong so much, that they will do things that they wouldn't normally do.... There's a level of energy, there's a level of excitement, there's a level of risk... that's attractive.... And there is a sense of identity that you get. You become the rabble-rousers, or you become the people who are saying the truth.... Almost a rallying cry. And it becomes stronger, and stronger. (Olivia)

Righteousness legitimised the fight. When there was principle at stake, people were more likely to commit to a faction and remain loyal. Loyal support was invaluable for faction leaders. Faction members were less likely to be swayed by new information and processed data through the lens of the group narrative, based on the overriding moral principle they were righteous about. This commitment to a narrative and to a faction met human needs for affirmation and belonging, and reduced uncertainty and ambiguity. Righteousness widened the schism as factions were further differentiated along the divide of right and wrong.

Righteousness promoted escalation of commitment. It could shift the focus of the contest away from the underlying problem that needed solving at the same time as making cooperation less likely. *People get vociferous, and they get on their high horse.... And they... CAN'T disengage (Philip).* Several participants remarked the drama of the conflict can take over and people can lose perspective completely. *What was being fuelled was the matter of conflict, not the matter of the school's well-being (Brian).*

Righteousness had the effect of situating groups in opposite and mutually exclusive positions, naturally intensifying the perceived need for power. No longer were people stakeholders in tension, or people with different perspectives, they were factions competing for the moral right to victory. Opponents were more likely to assume pernicious intent and trust was greatly diminished.

People felt judged and judged others, and personalisation of the conflict was exacerbated. *I got caught, 'cause.... that anger pulls you in (Felicity)*. When the outgroup was cast as the enemy, and attributed with negative traits and intentions, it was easier for people to contemplate win–lose contestation and exclusion as an outcome—often the only conceivable outcome.

Stigma. When schism escalated through righteousness, and investment in the outcome made people lose perspective, it was often judged as badly managed or as poor behaviour, including by people external to the schism. This judgment contributed to stigma and blame. Arguably, however, transformative change is not usually achieved through courteously dissenting or being moderately invested. People believed in what they were fighting for and what they were doing.

What on EARTH do they think about at night? But... are they actually believing that they are doing the right thing? Am I on that trajectory as well? You know, because I believe that what I'm doing is the right thing! (Belinda)

Furthermore, people were living the experience, not observing it; they were acting in the moment, yet being judged retrospectively. The section on human needs discussed the high degree of stress people are operating under, and the crisis-like, liminal conditions they are operating in.

Understanding why people act the way they do in schism seems a more productive path than judgment and blame.

Engagement. As well as enmeshing people in combative exchanges, righteousness prompted members to take responsibility for the future of their organisation. They became engaged in the governance process and shared in identity development. *The big meeting* featured in many stories. *It was the first time there was an election where there were returning officers, ballot papers, the whole box and dice (Brian)*. As well as encouraging people to be involved during the schism episode, passion and commitment carried forward to recovery and governing after the schism. *I think we're a stronger organisation now... the committee that we've got is very good, and support one another totally. I think that's been the benefit of it (Shaun)*.

Overcoming Barriers to Exit. Righteousness contributed to overcoming exit costs and justifying exclusion. There were significant barriers between intention to leave and actually leaving an organisation. Exit costs could be high: forgoing a valued identity, friendships, activities, salary, or sense of purpose. There may be few or no exit options nor viable substitutes.

So, you've got this renegade... group of staff, who... are just resisting.... Huge loyalty to that local leader.... And they bunker down.... They do almost everything that happens in a schism, except leave, cause they can't. They can't leave. (Quinn)

For people choosing to leave an organisation, righteousness often overcame fear of loss. *That's it, I'm done (Olivia)*. It was a difficult step to force a person out of an organisation: by asking them to leave, managing them out, changing membership criteria, or marginalising or ostracising them. Participants regularly faced moral dilemmas, and action to change a situation inevitably involved what was perceived—at least by some group members—as moral wrong doing (Nayak, 2016). In community organisations like volunteer nonprofits, there is a values barrier to exclusion. Righteousness can justify breaching this barrier.

People Expected Justice. How people felt about their schism experience retrospectively, largely depended on whether they believed justice had prevailed. *It was a good—well, if the wrong thing ended up happening it would have been a very bad experience—but, nah, it was a GOOD experience for sure (Finn)*. The expectation was that right would be done in the end, so when the end came and people believed right was not done, they felt both powerless and betrayed. *And yet, they still keep bulldozing (Jane)*. People found it hard to recover from the sense there was something deeply wrong with the world. *People have been talking about karma and all that sort of stuff [laugh]. I've been waiting for a long time for karma! Karma Karma Karma come! (Hettie)*.

Righteousness, as much as any of the elements or sub-elements, highlights the difference between everyday conflict and schism. There was more to resolving a schism than finding a reasonable and fair solution. *When ethics are compromised, it's very hard to move beyond that conflict. And I don't know that I've ever seen it happen (Olivia, conflict negotiator)*. Perhaps it was

necessary to challenge what is considered right and good for that community of people, in that place, at that time. Righteousness gave meaning to the quest, and assigned roles: “Such dramas generate their ‘symbolic types’: traitors, renegades, villains, martyrs, heroes, faithfuls, infidels, deceivers, scapegoats” (Turner, 1980, p. 155). Righteousness was where energy and commitment stemmed from. It legitimised action. It attracted supporters. It was why the fight mattered.

Legitimation

Legitimation is the machinery of universe-maintenance (Berger & Luckmann, 1966). In schism, the universe is contested and so are the machineries which maintain it. Legitimation is a social process suffused with power. Worldviews, institutional structures, narratives, and the right of particular people to act on behalf of others, all must be legitimised by living individuals. The previous sections on narrative, organisation, and righteousness illustrated that “legitimation has a cognitive as well as a normative element”—cognitive validity comes from explaining or rationalising, and normative dignity comes from justifying (Berger & Luckmann, 1966, p. 86).

In this research, people contested to legitimise resources of power and for the legitimate right to control and exercise those resources. The purpose of contestation was to shift the balance of power. In schism, people did not merely contest over the outcome of the purported issue at hand, they contested for the power to control that outcome. “The historical outcome of each clash of gods was determined by those who wielded the better weapons rather than those who had the better arguments” (Berger & Luckmann, 1966, pp. 100–101). In a win–lose contest this was a rational way to meet human needs including self-determination, security, certainty, and justice.

Power is Relative. Processes of legitimation were complex and multidimensional. In the cases studied, legitimation (and delegitimation) efforts were directed at people’s character, actions, ideas, and membership status—*He was only in the club ten minutes!... He didn't have the cultural background to take on the role (Owen)*. People contested the legitimacy of individuals or factions to exercise power in the group, especially to hold positions of formal authority; they contested the

legitimacy of group norms and processes and the particular enactment of these—*proxy votes everywhere....[laugh] it was such a farce, quite a few people resigned on the spot (Ken)*; and in some instances they contested societal norms and structures.

Since balance of power is relative, it was equally as effective to delegitimise the opposition as to build legitimacy oneself. In fact, it was often easier. Taking this route had ethical repercussions, however, which affected one's own legitimacy. Felicity felt personal loyalty towards members of the group acting to delegitimise Elizabeth's leadership, and she felt torn. *I'm looking at people, and it's like... I still couldn't see—[whisper] I couldn't see that Elizabeth was being bad. I couldn't see that the organisation was being [ruined]*. Felicity was impressed by Elizabeth's ethical leader behaviour. *Just by BEING there, being positive.... she didn't even talk about it... I think she did the best she could've in that situation*. Felicity later concluded the *anger* and *blackness* that marked that period was mainly because her friend was *in that place*. She retained the friendship, but she did not follow along with her friend's narrative of the schism.

Agency. Legitimacy seemed to be a link between power in theory and agency in practice. The range of strategic and tactical options available to each faction or individual depended on both their access to particular resources of power and the legitimacy of their exercise of that power. The activist coalition and the state government, for example, had far different resources of power, legitimised based on incommensurate and irreconcilable principles which the activists saw as boiling down to right versus might.

The cluster of small school principals provide an interesting comparison. Anne, Belinda, Adam, and Brian were appointed to principal positions in different schools, with different levels and forms of legitimacy, both internal and external. Coincidentally, none had been a principal before. Anne was a long-time teacher, promoted after a schism which cost the school staff, students, and significant financial security: *everyone was a little bit bruised (Anne)*. She was undermined by her council, encountered a perceived lack of external legitimacy early on, and displayed low self-confidence: *I think that people thought I wasn't up to the task (Anne)*. Belinda came from the

government school sector, and was undermined by an individual who built a coalition among staff and families, but Belinda believed in herself and was aligned with the board who appointed her. *The other board members had also had conflict with this person in the past... they were very supportive of what I was doing (Belinda)*. Neither enjoyed the fully endorsed leader legitimacy of Adam, who began his journey as principal of a fledgling school in a period where starting a new school was *in the zeitgeist (Adam)*. In a righteous breakaway from an existing school, he was unreservedly supported by the families, who shared in the trials of getting established. Brian's experience was of being promoted from teacher to principal in the middle of an active schism.

I knew that the previous principal was quitting, the opportunity was there, I wanted to take it, I wanted to give it a bit of a nudge in what I thought was... a new but not unreasonable direction for the school... And that was my quest... I was aware, and I had to deal with, a lot of the stuff around the conflict, but I wasn't IN it. (Brian)

The four principals had very different experiences. A leader mandate, insider status, self-confidence, and support were all important to how they perceived their legitimacy and their agency. Each had contextual factors they could and could not control.

Even if, to the outsider, the performance of certain roles appears an act of self-subjectifying subordination, for those actors involved they are activating agency within the structured conditions of possibility available to them. (Haugaard, 2020, p. 166)

Anne was the only one unhappy with the outcome on a personal level, but she took heart from doing what she set out to do, despite difficult circumstances, which was build student numbers. To exercise power, people needed the self-awareness to recognise resources available to them and the confidence, expertise, and support to use them, and develop more. They also needed endorsement from the people around them. Legitimacy restraints were both self-imposed and socially imposed.

In many instances, a resource of power could not be exercised legitimately unless it was perceived as legitimate for that actor in that context. *I'd thought to myself, this is the problem with*

being, ha ha—“the good faction”—if you appear to be doing something dodgy, well, that’s not good for the good faction (Cam). This did not stop people exercising power in ways people considered illegitimate. An exercise of power could be perceived as both legitimate and illegitimate, depending against what principle it was judged, and who was making the judgment. Furthermore, it was not clear cut. *The constitution was... not ignored, so everything was proper.... Just.... it had parents having conversations, and taking actions, which were not in the best interests of the school (Brian).* From a strategic perspective, the loss or gain in relative power from taking an action was weighed up against the loss or gain in legitimacy from taking that action. To complicate things further, the *right thing to do* was context and time dependent, subjective, and often obscured. As mentioned, people were motivated to simplify decision making; it was harder to allow ambiguity and doubt to remain, and this often led to making judgments based on assumptions.

Trust. On the surface, seen from outside and often from the inside too, people’s primary goal could seem to be a gain in power relative to the opposite faction. Schism often looked like a power struggle. The perceived need for directly actionable resources of power—as opposed to voice, delegating one’s power to a representative, or trusting in societal structures of power—appeared related to people not trusting each other’s intentions and capabilities. *I’ll be honest, I came back on the committee, because I didn’t trust Tammy (Deborah).* People were uncertain of who and what would be prioritised if the other faction were *in power*.

The executive said to me, “You’re my moral compass, Ryan”.... I felt that was quite... [searching, then shift to indignant]... You’re my leader, you’re meant to inspire me, to set the direction for the organisation, and if I have to hold you that accountable, then where are we actually going? (Ryan)

As factionalisation developed, and worldview impingement increased, trust between factions was eclipsed by trust within factions. Concern for the needs and feelings of members of the opposing faction and commitment to a win–win outcome decreased. The likelihood and magnitude of risks associated with losing the contest were therefore perceived to increase as schism escalated.

These fears were both pragmatic and ideological. A breakdown of trust was widely considered a *point of no return* and explicitly and implicitly communicated in a majority of interviews. *It's not only a two-person thing—people suspicious of each other—it can occur on a much bigger scale (Glen).*

Trustworthiness was something people looked for in their leaders. *Just 100% got the best intentions of the club at heart (Finn).* Who could be trusted was a common battleground. There was a dark side to making trustworthiness a primary criterion of choosing a leader, because trust was hard to develop and easy to undermine. Gossip, for example, was largely unanswerable. *People can say some extraordinary hurtful and painful things.... You can't respond (Elizabeth).* Leader trustworthiness—which participants judged on dimensions including belonging, intention, and capability—was often attacked. This caused personal anguish, sometimes over a period of years, while participants tried to build or rebuild leader legitimacy. In other cases, leaders left organisations feeling deeply betrayed. *I'm like, "Oh my god, I've just spent the last five years of my life dedicated to... and this is what you're telling these people that I've done" (Linda).*

Leaders were not the only people to have their personal legitimacy questioned. The environmental activists faced multipronged legitimacy attacks, as many activists do. The participants interviewed from Sporting Club 1 opposed the Coopers taking control of “their” club, and they genuinely believed the Coopers to be illegitimate as leaders, based on their newcomer status, their *reputation around town*, and their suspected self-centred motives. Labelling was a powerful way of delegitimising people and factions. Hettie, and the other people expelled along with her, reported a continuous barrage of delegitimation.

The day after the AGM, she apparently... was saying, "Oohh, what a WONDERFUL meeting, and what a WONDERFUL committee" they had... "We got rid of the—" what were we? Noxious weeds! We were noxious weeds [outrage and hurt]. (Hettie)

Structural Power. The observation that personal attacks were common, and distressingly easy, was connected to the observation that challenging power structures was rare and difficult. Legitimation that becomes taken for granted, and eventually invisible, fixes power (Clegg et al.,

2006). Important in this context was the reification of power invested in formal authority, and the conferral of this power onto the formally appointed group leader. If a group did not think their leader was representing them well, they could challenge the concept of power being invested in people in positions of authority, they could challenge the process whereby this person or class of persons was appointed to a position of formal authority, or they could challenge the person. In almost all cases in the study, the third option was the only one people could “see.” Or see as viable.

Challenging formal authority structures can be considered a good purpose of schism, but it was rare to see in this research, except in the case of—often externally imposed—changes to governance. A long-term change in the sector did appear to be occurring, however, at the level of who is appointed to positions of authority and by whom. In volunteer-led organisations in the study, democracy as a principle of legitimation was a strong emerging theme. *If the majority of people say yes, well, that's what you have to go along with (Tim)*. Factions with more people had a significant power advantage at a whole group meeting, such as the AGM. Decisions were sometimes moved to a different forum, with a new distribution of votes, say to committee meetings (as occurred in the Sporting Club 1 schism). But people still thought of this as being democratically represented, since they voted to elect the members of the committee from among their number.

In the schools and social service nonprofit organisations, a slow but sure shift was observed, away from leadership legitimised by democratic principles, and towards leadership legitimised by other criteria. The most obvious was professionalisation, aligned with becoming more business-like (Maier et al., 2016). A more subtle and pernicious theme was the delegitimation of members as fit and proper to operate and govern their organisation. *We don't say a parent-run school anymore, we say, um—I don't know what we say.... It was never parent run, that's the misnomer (Adam)*. More than a change in terminology was evident. A change in mindset was noted.

Typically in the sector you've got to work with what your members give you. And sometimes it's shocking. You think [big sigh], “This person's a total nutter!” And that's a technical term that we learned in the MBA program. But it means that

somebody is there who's disruptive, they don't know what they're doing, they don't understand their role. They're there to fight a cause, which may have already been resolved, they're ill-informed and they don't have the skills—and they don't want them. (Philip)

Philip's views were at one end of a spectrum, but the relative unsuitability of members to serve on boards was echoed by multiple other leaders influential in the sector, if more graciously and using more palatable rationalisations, especially business knowledge and objectivity.

Where it's quite hard is if you can only draw your board members from the school community. They have to be parents. More and more we're seeing schools even changing constitutions so they can co-opt a couple of independents. Having an independent person without a vested interest... is a really good idea. They have complete ability to step back and look at the big picture... There's no conflict of interest. (Carmen)

Board authority based on democratic representation appeared to be being superseded. Legitimation of board members was dominated by arguments for their perceived ability to better represent the organisation's and members' "best interests" (a whole other can of worms, Clegg et al., 2006): through skill sets perceived as more suitable now, and an independent (external) perspective perceived as more objective. This change in the basis of legitimate representation, while not uncontested, was being formalised and institutionalised. This added a degree of fixity as well as an additional layer of legitimacy, and made the rationale for the change almost invisible. The shifts were encouraged by external registration and funding agencies, adding another layer of legitimacy, and by implication delegitimising the "old" way.

In summary, legitimacy was necessary to exercise resources of power, and legitimacy needs proscribed agency. Acts of legitimation affected the balance of power and escalated schism. First, delegitimation of individuals or groups was interpreted as a personal attack, which inflamed schism

and induced righteousness. Second, legitimacy tended to be constructed predominantly among members of a faction, so did not generate shared understandings in the superordinate group, rather created further differentiation between factions. Last, delegitimation of the opposing faction cast them as “infelicitous and unreasonable” which “constitutes an impediment to drawing these social actors into negotiations” (Haugaard, 2020, p. 59). When the opposing faction could not be acknowledged as a reasonable negotiator, there was little opportunity to shift a schismatic conflict back into the realms of cooperative problem solving.

Contesting the Balance of Power in Schism

In this research, schism appeared more likely to manifest when power was balanced: when both factions perceived threat, and both could enter a contest with hope of success. Schism often ended with a decisive power shift having medium to long-term fixity. The decisiveness of a schism resolution was often reinforced by the winning faction through newfound resources of power: control of the group’s retrospective sensemaking, and legitimation and institutionalisation of resources of power which favour the winning group. The power shift could be securely fixed via mass exit, which signalled a permanent loss of power within the group. This may help explain why mass exit has come to be conflated with the end of schism, or with schism itself.

The observation that a balance of power favoured schism may contribute to explaining why distributed power structures have been associated with incidence of schism in the literature. This research suggests an alternative, or additional, explanation than failed conflict resolution. In distributed power structures, the nondominant group had access to high-value resources of power sometimes only afforded to the dominant group (e.g., power to select people in formal authority), so a shift in the balance of power was easier to achieve. Further the power differential was initially lower, even in times of stability. Distributed power was more likely found in democratic organisations, like volunteer-led nonprofit organisations, where legitimate processes existed to withdraw a leader mandate, and to put forward alternate leaders from the membership. This same

argument may apply to the anecdotal observation that nonprofit organisations have higher incidence of schism than other types of organisations: nonprofit organisations tend to distribute power. A second observation was the relative ease of shifting the balance of power in smaller organisations via the actions of one or a few individuals, and many nonprofit organisations are small.

In this study, people instinctively contested to develop resources of power. This instinct seemed a rational response to threat, perceived powerlessness, and the human need for self-determination. Various resources of power were available to individuals and factions in a particular context. The dominant and nondominant group typically had agency to exercise different resources of power. Each resource of power, and the right to exercise that resource, were legitimised as part of the process of shifting the balance of power. The legitimisation process was contested and steeped in power itself.

The contest for power tended to escalate schism. As schism developed, the contest became more about securing the power necessary to control the outcome of any situation, rather than about contesting the outcome of a particular situation or issue. Narrative, organisation, righteousness, and legitimacy were emergent themes in the data, and proved helpful lenses for gaining insight into how people perceived, constructed, and enacted power in schism. Balance of power is named as a performative element in the lived experience theory of schism presented in Chapter 6.

Group Leadership Capacity

Group leadership capacity is the third performative element emerging from data, defined here as the capacity of the group to harness available leadership resources, and collectively enact leadership to meet the needs of the group. This concept presumes an understanding of leading and leadership as enacted and constructed by group members. Power and responsibility may appear more or less distributed, depending on the context. Tacit agreements and formal structures—with various degrees of fixity—distribute power to individuals to act on behalf of others. Systemic constraints also affect how organisations choose to enact group leadership. While often perceived as

reified, however, leadership and power structures are social constructions which “have been made, and therefore can be unmade” (Haugaard, 2020, p. 117).

This section is not intended to be a discussion of what group leadership is or should be, rather the focus is on how leaders and leadership—however they are understood, structured, and enacted in a particular group—were observed to affect people’s lived experience of schism. The terms “leader,” “leading,” and “leadership” have many nuances of meaning. In this thesis, leading is an activity of leaders. A leader is a person who has formal or informal influence in the group. Leaders, especially those formally appointed, are responsible for enacting leadership. Leadership is the craft of leading, and an emerging group capacity. A leadership team is a group of people who enact leadership collectively, especially a governing body or executive team or a combination of both. Participant quotes may use these terms with different connotations.

In order to clearly convey observations and analysis of data, some terms have been introduced. The evolution of terms, including group leadership capacity itself, occurred over the course of the project, and this evolution is described below. Terms with a specific meaning in this thesis are compiled in the Glossary. Following this introduction of a lexicon, data is presented to illustrate the pivotal role group leadership capacity plays in schism.

Evolution of Terms and Concepts

In the earliest stages of data analysis, during interviews and through immersion in stories, leaders and leadership were noted as significant in multiple schisms. When participants set the scene for their story, it was common to hear of a *leadership void* or absence of leaders: loss of a valued leader; a period of short-term, temporary, or unsuitable leaders; or leaders who were not conferred legitimacy by the group. An absence of leaders enacting leadership was coincident with schism. Thematic analysis revealed other leader and group leadership issues beside a leadership void which had similar effects on the lived experience of schism. In Sporting Club 1, for example, committee members were at odds, multiple presidents resigned, the committee did not engage with

members, there were not enough volunteers, there was a lack of trust in the committee, there was a contest for the presidency, and the constitution proved unhelpful in a predicament.

Other leader and leadership issues emerged from data: a mismatch of leader attributes and context; a change in leadership style; leaders distracted from enacting leadership by conflict, crisis, personal circumstances, or undermining; overreliance on one or a few individuals; strained relationships, communication breakdowns, lack of mutual support, and personality clashes; and underdeveloped, unsuitable, or weaponised governance. These and leadership voids were collectively named *leadership breakdowns*. Early analysis indicated groups could absorb or adapt to a certain number of leadership breakdowns, but a combination of concurrent or cascading leadership breakdowns could create a *critical leadership breakdown*, whereby schism would be the likely result.

A sense of theoretical misalignment grew however, between this concept and other concepts emerging in parallel. First, the concept of leadership breakdowns originated early in the project, when schism was still conceptualised as linear, and linearity was in the process of being problematised. In the data, leadership breakdowns were observed as antecedents or triggers of schism, but they were also identified as outcomes of schism, drivers of escalation, or marking turning points or points of no return. Furthermore, groups were continually building up leadership resources, and adapting to or repairing leadership breakdowns; there was not a one-way process of deterioration.

Second, it was a priority that no implied or explicit judgment was made here about how groups should enact leadership. The leadership breakdown concept began to generate a list of observed leader and leadership “strengths” and “weaknesses,” based on observations of different groups in schism. This threatened to end as a prescriptive “how to avoid schism” list, when the strongly preferred approach was the complete opposite: to support choice and variety in the way groups with different philosophies and leadership resources may legitimately organise themselves. Finding fault or blaming people for schism—especially the dedicated volunteers and leaders who participated in this study—was also far from the aim of this research.

The concept of group leadership capacity replaced the idea of a simple summation of leadership strengths and weaknesses. Group leadership capacity allowed for complexity—which fit with other concepts in development—as well as the idea of trade-offs and synergies between aspects of leadership, and group members' capacity to adapt, build, and utilise (or not) available leadership resources, in the particular context, for a particular purpose.

The third discordant note was less philosophical and more about paying close attention to data, to differences in stories as well as similarities, and looking at schisms over a longer time period. Circumstances which appeared as a leadership breakdown in one schism did not necessarily create vulnerability to schism in another case. Furthermore, aspects of the organisation's leadership, identified by storytellers as leading directly to schism, may have served the group well for many years prior to schism. In fact, the leadership aspect in question was often (not always) something the group would be reluctant to forgo, or unable to change even if they wanted to. It may be a core belief, a preferred way of doing things, or a question of expertise, resources, size, priorities, or *realpolitik*—*people are people are people (Elizabeth)*. What appeared to affect schism was not the specific form or number of leadership breakdowns, rather the interactive effects this had on other elements of the schism, on meeting human needs, and on the balance of power in the group.

Groups in the study relied on certain *aspects of leadership*—understood as any person, role, task, activity, responsibility, or structure associated with performing leadership—in preference to others, by choice, out of necessity, or through lack of conscious awareness. *Leadership resources* are understood as a subset of all possible aspects of leadership, those that group members perceive they have access to in the context. A resource is seen here as distinct from capacity, in that a resource is the raw material (discrete, e.g., a person with leader potential) whereas capacity requires the group to be able to harness and combine resources to enact leadership (synergistic, e.g., electing and supporting a person to lead), including learning new ways to enact group leadership as needed.

Aspects of leadership could be in tension, such that choosing one meant trading off another. *Leadership tension* was coined as a term to describe a current working arrangement that had the

potential to contribute to schism in future, given a change of circumstances. Leadership tensions could be adapted to and sustained in a group because of redundancy. Leadership tensions did not necessarily lead to schism incidence; the way leadership resources were utilised could continue to serve the group indefinitely. Tensions could develop into breakdowns, however, if something in the system changed.

Aspects of leadership in participant narratives were sorted into emerging categories through theme-based coding (as shown in Chapter 3, Figure 2). These categories were adapted and relabelled, as group leadership capacity converged with other concepts in development. The new categories—people, network, and structure—became sub-elements of group leadership capacity. The people sub-element included individuals who influenced the group dynamics: those in formal and informal leader roles, the so-called *conflict person* or schism-maker, and conciliators. The network sub-element included all the group members and their social and functional relationships. The network nurtured social identification, facilitated cooperation and goal achievement, and provided redundancy in case of individual failure. The structure sub-element included governance, culture and identity, organisational knowledge, and sociohistorical norms and expectations. People, network, and structure are familiar terms in academic literature, and they can have different connotations. The intended meaning of each, in the context of this work, is clarified by situating the three sub-elements in relation to concepts in literature (see Table 12).

To summarise, group leadership capacity is the capacity of the group to harness available leadership resources and collectively enact leadership to meet the needs of the group. The choice to utilise different leadership resources or enact leadership in a particular way is made by the group, consciously or otherwise. A chosen combination of leadership resources may meet the needs of the group in the context, even if aspects may not work for them in a different context, or for other groups. A leadership tension is an existing functional arrangement of leadership resources that has the potential, with a change of circumstances, to become a leadership breakdown (or breakdown in group leadership capacity) and increase the group's vulnerability to schism. A critical leadership

breakdown is a combination of concurrent, cascading, or pivotal leadership breakdowns which can be identified as contributing to the incidence, escalation, or inflammation of schism.

Group leadership capacity is posited as a performative element of LETS. It is the element observed to be most subject to human agency and control, and thereby the most effective lever for group members to influence schism. Three sub-elements of group leadership capacity were identified: people, network, and structure. The following sections explain each sub-element, illustrated with examples from the data.

Table 12 Sub-Elements of Group Leadership Capacity Relative to Existing Literature Concepts

People	Network	Structure
Individual acts of structuration	Social construction of reality, e.g., legitimization, socialisation	Systems, institutionalism, symbolic universe, fields of power
Sum of individual actions	Collective action, synergy	Directed, coordinated, structured, organised action
Agent	Agency	Structure
People	Relationships	Roles
Human capital	Social capital	Organisational capacity
Individual expertise, tacit knowledge	Knowledge creation	Organisational knowledge
Personal identities (e.g., professional, leader, member)	Shared identities, subculture, counterculture	Organisational identity
Voice, power of individual	Consensus, consultation, politics	Governance, who makes decisions, by what right and what process
Individual performance	Teamwork	Strategy and operations
Personal responsibility	Mutual support, collective responsibility	Organisational accountability
Integrity	Trust	Transparency, accountability
Communication skills	Communication	Communication channels and protocols

People

I've been called megalomaniac and a dictator. I take those as a bit of a badge of honour... My version of that is drive and commitment.... The educational leadership of the school, and the embodiment of the school.... Yeah. Leadership's a curious space. You have to do it, otherwise... stuff won't happen. (Brian)

People featured in the data as pivotal to an organisation's group leadership capacity—particular individuals, not the role. *You put two or three strong good personalities in, or two or three toxic personalities—I guess that's why it can heal itself, or turn bad so quickly (Elizabeth)*. Individuals perceived as creating conflict, and people who acted in leader roles, affected the collective lived experience of people in schism.

My experience is once the leader goes, other people go, too.... You... bring in a new leader with a different way of working... and a different structure, and a different belief system, and a different set of ethics... I understand why... some statistics say 80% turnover within two years. (Olivia)

Leadership tensions and breakdowns were noted when there was no stable leader, respected leaders exited, leaders were seen as not having expertise, valued traits, or insider status, leaders were not able to perform their role due to lack of resources or member support, or when factionalisation led to an open contest for leader roles. These were vulnerable times for groups, and uncertain times for members. “The death of a king.... brings the terror of chaos to conscious proximity” (Berger & Luckmann, 1966, p. 96). Participants expressed a need for a leader whose strength, capability, and ethics they trusted, and who they perceived embodied and was committed to the organisation. Quality and continuity of leaders mattered (Ancona, 2005; Avery, 2004; Day, 2000; Mumford et al., 2007; Nayak, 2016; Uhl-Bien et al., 2007).

Leader Exit or Absence. Leader exit was common to a number of schisms in the study, as a trigger, a desired outcome, collateral damage, or via a contest over a leader role. *I think most leaders do leave in conflict (Olivia)*. Leaders who replaced a founder or favoured leader faced extra

challenges, such as outsider status, disruption of existing power dynamics, being unfavourably compared to the previous leader, implementing change into a stable environment, and the surfacing of subcultures or identity shifts subdued by the presence of the previous leader. *When I came in—um—I don't think it was about me, I think it was about ANYBODY that would've had this position (Belinda)*. Concurrent or successive leader exits, or temporary or short-term leaders, affected overall organisational performance and threatened security and predictability, identified as human needs in schism. *They've had... four different people in leadership roles in the last three years, 'cause they've had "acting" and "temporary".... It's an impact on... the most important people in the school.... the children (Carmen)*. Having no leader at all for a period was described as particularly unsettling.

Participants in volunteer-led nonprofit organisations reported a reduction in willing volunteers. *I suspect this is the same in any number of volunteer sports, but enthusiasm to volunteer has somewhat waned (Van)*. Participants particularly noted that a too-small pool of potential leaders could lead to unsuitable or contentious appointments. *He was.... willing to do the job. And in a small club like [ours], that's what you want (Dino)*. This perceived lack of expertise and commitment in smaller clubs made them vulnerable, especially when they needed to respond rapidly to circumstances which demanded more than an everyday level of group leadership capacity. Larger organisations looking for board members with specialised skills also reported finding their options limited, and often looked beyond the membership of the organisation to find leaders.

In contrast, a number of participants in the study worked with, or were themselves long-term, inspirational leaders who played a significant role in their organisation and its development. This could lead to a leadership tension due to concentration of responsibility, to be reckoned with when they left. Arguably, the trade-off was worth it. They all performed leadership differently, but all had a clear leadership philosophy and could articulate how that translated to practice.

I think leadership is misunderstood... People think leadership is this hierarchical thing, and I think leadership is... earned... If you want to work with a group of people, you need to get their consensus... They allow you to take on that role of leadership....

Now if they've given you that permission, you go for it, you absolutely go for it.... But that doesn't mean you have the power over people. They give you the power to use it at that time. (Jane)

Leadership Expertise and Leader Traits. Several cases involved leaders lacking leadership expertise or desired leader traits, based on the perception of self or others. This perception could be general or specific to faction, context, or task. *Everyone's got different traits... Everyone judges "good" differently (Glen).* A perception of unsuitability was often contested, at least partially socially constructed, and in several cases was described as the core issue of the schism. Lack of leader experience and expertise reduced group leadership capacity to anticipate, respond to, and manage conflict, especially when novel situations arose. When the leader did not have organisation-wide legitimacy, or the full confidence of members, this accentuated other leadership tensions because often the first response of groups in crisis was to look to the leader for guidance (Mumford et al., 2007; Pearson & Clair, 1998).

In schism, unsurprisingly, the willingness and ability to take responsibility for actively and ethically managing conflict was perceived as an important leader trait. *The leader needs to be chosen... for the skill sets that they have. And one of them is around conflict resolution.... That is the KEY area that can bring a group to lying down (Penelope).* "Strength" was seen as an important trait in leaders during schism, and its absence noted. He was the *chairperson and really nice guy but as weak as (Hettie).* What constituted strength was not always explicit, but participants distinguished strength from bullying, which was universally unappreciated. *It was very dictatorial, they tried to really bully people (Cam).* Integrity and trustworthiness in a leader were commonly mentioned by participants, as was having the best interests of the organisation as a high priority.

Knowledge of Governance. A lack of understanding and familiarity with the group's formal governance was common in stories, especially in small volunteer-led nonprofit organisations. People talked about reading the constitution closely during schism, often for the first time. This contributed to poor process, information asymmetry, and weaponisation of governance. Cam was deliberately

given the mistaken impression the club would be permanently wound up if a committee were not elected at the AGM. On the basis of this belief, he took action which escalated the schism. *I was not knowledgeable enough about the laws and constitutions.... how committees work... all that sort of stuff (Cam)*. Process run competently, fairly, and transparently by the committee was most often a calming influence. Finding loopholes and creative interpretation of constitutions escalated schism.

Novelty, Growth, Crisis. Leaders capable in most circumstances still struggled in certain contexts. Transformational growth, novel situations, crisis, and schism often created a mismatch between the needs of the group and leader expertise. Professionalisation and rapid growth put pressure on board members to *keep up with financial complexities* (Elizabeth). A greater organisational risk profile and financial literacy needs created a schism in Elizabeth's board between people who said, *"I've been along for the ride, it's been fantastic, but I see it's moved, I'm going to step down,"* and others who *weren't at all happy* (Elizabeth).

Leaders performing at the limit of their experience or capacity were vulnerable to unexpected situations: a personality clash, loss of key support, a new project, a change in government policy, and of course schism. Leadership network strength, especially redundancy and support, helped in such situations (leadership network is discussed in the next section). Personal circumstances sometimes changed. Volunteer committee members may no longer be available to serve the organisation at the level of commitment needed. Participants understood people gave what they could, and expectations were realistic, flexible, and individualised. When people stepped down at short notice, formal structure (things written down) helped with transitions.

Inadequate Resources. There was evidence in several cases of the leader role simply being too big for one person, or of a lack of support, insufficient access to resources, or unrealistic expectations. *The board put me into the CEO role. And when I say that... I was getting paid for 10 hours a week, 30 bucks an hour, and I was working probably 80 hours a week (Linda)*. Overloading affected day-to-day operations, and stress on leaders. *I've really looked at... the role of principal in these small schools. Because I think... it's not really that sustainable (Adam)*. Operating permanently

at maximum capacity made it difficult for leaders to respond to a crisis such as schism, or undertake the invisible work of leading which mitigates against schism.

These are all the things that you have to do, and that people don't know you're doing... And half the time you don't mind doing them... but when people start accusing you of all sorts of things... that's when you really do start to feel underappreciated—feel crushed in a lot of ways. (Anne)

Schism-Makers. Many participants remarked on the phenomenon of *the conflict person*, individuals who created conflict wherever they went, and fomented schism. *One, two, three, four clubs. Each club, he caused issues.... And moved onto the next club (Dino).* Smaller clubs were seen as more vulnerable to individuals triggering a schism. *I could see where a small club would be challenged by a big personality... someone with... real intent to get their way (Glen).* Participants referred to people as *psychopaths, sociopaths, narcissists, only in it for themselves, or power hungry*—these people were considered schism-makers.

Conflict resolution practices in nonprofit organisations are often based on the maxim of focusing on the issue not the person. Personalising conflict can be considered infelicitous or a failure of process or of community. *In not-for-profit groups, where there's dissention, people won't sit down and say, "YOU are the problem." Because this personality thing... It's easier to FUDGE these things (Owen).* In this research, conflict very often originated in people and relationships, and other issues—perceived as more legitimate things to argue about—acted as a *smoke screen or red herring*. Obscuring the source of the problem precluded early intervention in several cases and, in others, created room for manipulation.

Managing clashes with difficult people was noted as more problematic when they were volunteers than employees, especially volunteer board members, who formally have power over the CEO or principal. Elizabeth and Belinda, among others, experienced situations where they felt forced to manage out members of staff, but there was no equivalent process for asking volunteers to leave their organisation.

Two and a half years, I was on the receiving end.... It was constant... There was... aligning with staff... the receptionist... assistants... She would... manipulate THEIR thoughts and so it was very very undermining.... I had to make some really tough calls—manage those staff members out. I couldn't actually get rid of her. (Belinda)

Outsiders and Old-Timers. People new to an organisation featured in several stories as triggers of schism. This especially applied when the organisation was small, or more than one person joined at the same time. *This group came in as eight. And they came in together.... They had a core culture that they already held (Olivia).* New members were often perceived as not having the appropriate knowledge to instigate change. *We had two new members join and they were close friends... One night... they said, "Well, we'd like to put a motion forward—no confidence in the president." That was me! (Tim).* Tim might not have been the perfect president, but he was the only one willing, and he was well liked; the two new members were the only ones who voted against him. The opposite outcome occurred in Tim's other club, where two new people did trigger the exit of the long-time president and her husband along with a number of other members. Members tended to be deeply suspicious of perceived outsiders aspiring to leader positions, usually rationalised as not knowing and trusting the individual, the new member not having the historical and cultural knowledge needed to be leader, and protection of the group's identity.

As well as new people, older members were sometimes perceived as problematic, especially in response to change initiatives. The *old guard* trope often applied to people who were active in club activities or entrenched in leader roles, but not always.

He said, "Oh... my wife and I have done plenty for the club".... ONCE, I think he was a minor officer... within the last 16 years.... He's not one of the major players [laugh] but he clearly thinks that he is. But he would also be influential, in people's ears.... The active people aren't the only people who influence things, the people who AREN'T active can be a big influence as well. (Matt)

Interactions. In keeping with the complexity theme of this thesis, individual leaders and schism-makers did not act in a vacuum. People were central to group leadership capacity, but relying on capable or even inspirational leaders could induce leadership tensions if the leadership network and structure were not maintained. At Sporting Club 1, several members of a long-serving and well-functioning committee retired together, setting up the conditions for the schism a few years later.

We had a fairly committed committee, and then a group of us all left at the same time. It probably was unfortunate... And so they were a bit rudderless... The committee became hard to find, and then obviously fairly fractious... There was... a disconnect between the parent group and the club.... The club was fractured. (Eli)

Even if the future were known, groups may be willing to accept five or ten good years, and deal with the possibility of a difficult transition later; this is absolutely a valid choice. It is impossible to criticise volunteers on committees who made it a priority to run tournaments, show up at busy bees, and talk with members, rather than undertake governance reviews or strategic planning—especially if that is not their wont and their time is precious. Succession planning, some participants noted, could translate as following through on a long-standing threat to retire while hoping others would step in once the hole in the leadership network became a reality.

Network

I was the centre of the vortex. There wasn't me alone. And I remember thinking there is a bit of a cross section of what we need. I remember having that feeling. (Adam)

The Network Metaphor. The metaphor of a *leadership network* is put forward to represent the synergistic combination of people and their relationships. The leadership network facilitates a complex flow of information, mutual support, creativity, and power, enabling cooperative work to be done and the social construction of organisation. The leadership network is identified as a powerful sub-element of group leadership capacity. The leadership network is distinct from individual leaders and from structure, but the three sub-elements interact and overlap. For example,

the leaders and schism-makers discussed in the previous section are also integral to the formation and maintenance of the network. Organisational culture, which is a structural leadership capacity, influences the quality of connections between people in the network, and therefore network strength and flexibility.

Universally, participants expressed a preference for harmony over conflict. *You want to work in some sort of harmonious group. You can't work in this conflict, in a club which has continually got conflict. You want to solve it, so you can move on. Work in cooperation (Neville).* Leadership tensions and breakdowns in the network inhibited the dynamic, social, and creative aspects of group leadership capacity. Network tensions and breakdowns were signalled in the data by people feeling isolated, unsupported, overworked, or undermined; loss of trust; restricted communication flow, secrecy, or excessive or inflamed communication; not being able to find volunteers; personality clashes and power struggles; feeling and acting at cross purposes; blame and schadenfreude; and a deterioration in sense of belonging and camaraderie.

When I got there four years ago, it was a friendly atmosphere... You know, you'd have a joke and a laugh... and it just deteriorated. Now... I hear whispers of conversations, everybody's watching their back. (Ken)

Networks were observed to be dynamic and require ongoing maintenance, or else they could be damaged, either through changes in people's involvement or in the direct and indirect connections between people. But networks could also store reserves of support and strength, and they could be restored. At Sporting Club 1, Eli had drifted away from the centre of the club's activities after he left the old committee and his (player) son grew older and more independent. When Cam was feeling threatened, however, Eli's loyalty to the club and to Cam was revived and he went on to fight for the club and serve again on the new committee for more than five years. The new committee members were able to restore a good deal of the lost club spirit, without having to start completely from scratch.

The network metaphor is helpful for picturing group leadership capacity as a shared responsibility, and leading as a shared activity among members of an organisation, even though individual leaders may occupy key roles. The network can also represent connections across perceived organisational boundaries. Just as groups were served by expert leaders, strong and flexible group leadership networks appeared to improve schism experiences and outcomes.

Connected Networks. Groups where a high level of connectivity was observed appeared to have stronger and more tangible leadership networks. Connectivity was apparent in the relationships between each person in the network (and key leaders in particular) and how, in combination, relationships connected the group as a whole. Connectivity was dependent on how strong and durable the relationships were (e.g., degree of positive mutual regard, frequency and quality of interaction). Strongly connected networks tended to more comfortably and effectively facilitate sharing of information, knowledge, energy, support, and creativity, for instance. In schism, connectivity could be blocked by individuals (e.g., a person not performing their role) or by poor relationships and communication (e.g., secrecy, mistrust, ill will). Factionalisation was escalated when stronger network connections formed within factions (e.g., secret meetings, car park gossip) than amongst the whole group. A mutually reinforcing link was observed between whole group member engagement and whole group network connectivity.

Network connectivity depended on communication and trust between people, interdependent themes which were remarked upon over and over again in interviews.

To have good discussions at the board level, you need trust around the boardroom, and that's what the chair has to do, so if you don't have a good chair, that trusting relationship often doesn't happen. (Carmen)

Communication was affected by people having different worldviews, logics, language, and values.

People keep saying to me, "It's all a communication area issue, Olivia." And [I say], "Oh, so shallow and superficial, and useless!" Because then it implies all I have to do

is use more words. And that's not going to help. It's not more words that you need...

it's words that can be heard by the listener. (Olivia)

Networks were stronger when they had multiple communication channels. Communication in the network was not simply about formal lines of communication, but the informal ways that ideas and information were shared between people. In schism, communication typically fractured along factional lines, as distrust and threat perception increased, and private strategy meetings superseded cooperative work meetings.

Isolation of Key People. Despite leaders often appearing as the centre or having a key role in the network, connected to everyone and everything, they commonly reported feeling isolated. *I felt as though I couldn't have friendships within the school anymore.... It was a real shift... because you're in that [leader] role (Anne).*

Disconnections or blockages in the network could cause leadership breakdowns. When a CEO or principal was the only connection between governing body members and the day-to-day lived experience of members of the organisation, for example, this lack of redundancy in connectivity generated a leadership tension. In this situation, the group is only one disconnection or blockage (or leader not performing their role well) away from a critical leadership breakdown. CEO–board relationships are notoriously fraught.

The relationship a CEO or principal had with their board chair seemed pivotal to their lived experience and to operational effectiveness.

We started off quite nicely, but I thought she was sweet and ineffectual, and I LOATHED the fact that she wouldn't defend me.... She wanted me to like her, and I was just starting to lose respect for her. So, we just grew further and further apart.... I just woke up one day and thought, "Oh my god, this is all gonna end horribly."
(Elizabeth)

Elizabeth considered it imperative to have good relationships with board members, especially her chair, and she rebuilt this relationship. Some people interviewed experienced difficult CEO–board relationships. On the other hand, close connections were both productive and personally rewarding.

My chair is... absolutely fantastic....We're REALLY proud of what we've done together (Belinda).

The leadership network was where the impact of schism-makers was felt the most, especially in a small organisation, where just a few people could create a negative atmosphere, foment distrust, and create alternate communication circuits, leading to conflict and schism.

It was car park gossip, it was a couple of parents got involved, and they just revved up a few more, and then they said, "Heavens, if five or six of us feel this way, probably the whole school does, let's get a petition and see if we can get [them] dismissed." (Carmen)

Flexible Networks. Groups displayed different degrees of flexibility in their leadership networks. Flexible networks were dynamic and responsive to circumstance and change, while still able to maintain connectivity. Redundancy within the network allowed it to more easily adapt to blockages and broken connections by rerouting. Flexibility and redundancy were related to goodwill, mutual support, good communication, adaptability, cooperation, team building, and organisational resilience. In schism, where leadership breakdowns are common and people are unusually stressed, flexible and redundant networks acted as powerful risk mitigation features.

Utility of Network-Focused Leadership. Looking at group leadership in the data showed that a network-focused leadership style accentuated different features of organisation than a structure-focused leadership style. On the surface, the two perspectives appeared to be in tension. Their contrasts are highlighted here, with an argument for the utility of a network.

Some participants preferred what is simplified here as a structure-based or functionalist style. For people who preferred this style, separating responsibilities was believed to reduce conflict and enable efficiency and accountability: *it's best if everyone decides, yep.... absolute clarity of roles (Carmen).* When each person performed their function as prescribed by their role, the whole system

worked together effectively, and people felt secure. Everyone performing their role well is not guaranteed, however, and in schism this assumption may be even more precarious.

Participants reported many examples of leaders not performing their role as needed by the group. *We had a board member who was both spiteful and just in our face constantly, and a chairman who wouldn't deal with it (Isaac).* This situation, where two people were perceived to be not performing their function well, affected the board's functioning and also the CEO's ability to do his own job. A leadership breakdown was created. An automatic focus on separating who was accountable and responsible for what (and *not stepping on toes*) produced blame and criticism in place of possible mutual support and shared responsibility. This defeated the purported aim of lowering levels of conflict and increasing organisational effectiveness.

This was not the only issue Isaac had with his board—there were many—he said he always *played a straight bat* with his board, and was totally professional, but he portrayed his CEO–board relationship as an uncooperative and unpleasant lived experience. Strict lines of responsibility (ostensibly imposed to reduce interpersonal conflict) and strained relationships were observed to reinforce each other once a tipping point was reached (reminiscent of schismogenesis, Bateson, 1935).

A network-focused approach to Isaac's board situation may have allowed a different person, who felt more confident, had better skills, or had a better relationship with the problematic board member, to step in and support the chair to manage them. Or perhaps to offer direct help to the first-time board member, who Isaac described as having *FEAR just coming out of every pore*. Flexibility and redundancy in the network can provide support for individual leaders not performing their role as needed by the group, take advantage of individual strengths, and create synergy. Performing this type of network-style intervention in a strictly structure-based context (or in Isaac's situation, as relationships stood) would be problematic, as it may feel like criticism or humiliation rather than help. A network orientation to group leadership depended on philosophy and was a mindset, not just an arrangement. It affected organisational culture in turn.

When there was redundancy between roles, people could leave an organisation without it being a *scramble*, or *big hole (Linda)*. If someone *drops the ball*, or is *struggling*, or *distracted*, or *gets sick*, or a *crisis* occurs, or the job is *too big for one person*, the network could provide support. Overreliance on flexibility, redundancy, and good relationships, however, could also create leadership breakdowns. Schism was associated with important leader responsibilities falling through the cracks, which can happen when roles are not clearly delineated, just as easily as when one person is struggling in their role. Schism is also associated with personality clashes, and this precludes network features such as good will, forgiveness for failures, and willingness to help.

Structural and network preferences for performing leadership had advantages and disadvantages in different settings. Integrating the two was observed in the data, although this was not just a matter of doing some of each since, as mentioned, they are fundamentally different. Operating like one while appearing as the other, or utilising both styles but in different contexts, is discussed in the section on dual structures. Transitioning from a network to a structural governance, by choice or due to isomorphic pressure, was observed as a leadership tension in the data.

In volunteer-led organisations, the relational aspect of being part of the leadership team was described as intrinsically valuable, and a consideration when volunteering on a management and governance committee. Better utilisation of individual expertise and support for individual limitations were observed when roles were more flexible and had more redundancy or overlap. A notable example of utilising leadership resources at hand was when a CEO or principal had industry expertise not shared by board members, or when they were perceived as the symbolic group leader by members. When reminiscing, Adam described intangible network qualities and responsibility crossovers, that even he no longer perceived as legitimate, but had enabled his school to thrive in the early years. *A lot of community bonding and energy.... I think it was out of necessity that the board was getting into operational things... during the journey, because you didn't have the capacity.*

When people worked closely and cooperatively, they described rewarding lived experiences, and synergies gained for delivering organisational outcomes. These types of working relationships

seemed associated with communities being resilient to factionalisation, at least while the current people and relationships continued. Network-focused working relationships did contain inherent leadership tensions, for the very reason they worked. Their success depended on complementary skills, compatible personalities, mutual respect, trust, and the value people put on the relationship. Network leadership capacity relied on people, and the ever-present phenomenon of difficult people *popping up* has been discussed several times in this thesis already.

Membership and Member Engagement. Network leadership capacity depended on who was considered a member of the organisation and how power and responsibility were distributed. Network strength was affected by the number of members involved in group leadership, to what degree they felt empowered to contribute, and whether they felt responsible for the identity, operation, and future of the organisation. Strong networks were an indicator of collective responsibility. Networks were not necessarily bounded or restricted to members of the organisation. Some organisations in the study were more insular or self-contained, but others drew on relationships and resources nominally outside the organisation.

In organisations in the study where professionalisation was underway or complete, leadership network capacity was sometimes limited by the perceived capacity of members to act as skilled contributors, and by a changing perception of what it meant to be a member of an organisation. Networks seemed dominated by paid members of staff. In volunteer-led organisations, leadership tensions were noted in the perceived reluctance of people to volunteer, which put more strain on each person trying to maintain the network. Van diagnosed his organisation's schism as caused by not enough people willing to contribute to network leadership capacity.

Over the years... [the annual state tournament] has been organised by less and less people... the same people over and over.... It reached a point last year where the... rep and I were the only two people organising the tournament. We literally couldn't find anyone else to... help. (Van)

Networks spanning organisational boundaries were sources of strength evident in several cases. Cam's cross-boundary relationships with other coaches helped him be alert to threat, and to feel supported, even before he had any support within his own club. When Neville's club appeared to be *fragmenting* and in *danger of collapse*, recourse to mediation was available through the overarching organisation, and the large size and enduring nature of the global organisation they were part of was reassuring for Neville. Having said that, relationships across boundaries added to isomorphic pressures, which were observed to exacerbate schism. When Anne began her principal role, her school was in the nascent stages of changing its governance and management structure, and scrutiny felt like a liability to her. She felt *humiliated* by judgment from outside entities, rather than supported and connected to a wider community.

Brian took a rebuilding approach after a schism, establishing his school in the independent school education community, and in the geographical, political, and cultural community the school was situated in. He formed relationships that spanned boundaries and secured the school's identity within multiple networks. These relationships and the establishment of the school's identity enabled him to stabilise the external environment to be aligned to his school's values and pedagogy.

We started to... have an influence in the broader education community.... We did a lot of work in policy development, belief structures, literacy development.... I loved it, and I loved that the staff were all part of being... well respected.... I think it's part of the joy and the success of the school. (Brian)

Being part of a leadership network was observed to fulfil human needs for belonging, security, empowerment, predictability, identity, achieving shared goals, and simple enjoyment.

Structure

*I don't believe just 'cause ideas are tenacious it means that they're worthy. (Tim Minchin, *White Wine in the Sun*)*

Structure is the third sub-element of group leadership capacity: tools of group leadership including governance, culture, identity, mission, values, professional codes of conduct, sector norms, and sociohistorical constructs. Structural tools are built on systemic power, which contributes to their perceived stability and aura of even-handedness. Structures provide, from a human-needs perspective, certainty, predictability, internal consistency and—if not justice for everyone—a transparent process for decision making and applying sanctions. *Okay, so the important thing is... to go through the democratic process (Philip).*

In the liminal state of schism, structure served as a valuable stabiliser for people. When trust and communication were damaged and conflict manifest, taken-for-granted ways of working ceded to formal processes. Structural tools and processes were often exempt from factional contest, which was valuable for making decisions everyone could accept, and for future cooperation. “To leverage liminality productively, other aspects of the context (such as cultural rules, beliefs, expectations, sanctions) are required to support the transition” (McCabe & Briody, 2016, p. 8). Structure was not always exempt from contest, however, and structure itself could be the target of schismatic transformation. Structural change may well be one of the good purposes of schism in society.

Structure sometimes escalated schism or hampered efforts at resolution. Schism is characterised by novelty and the unexpected, while formal governance and norms are based on anticipating needs and familiarity. Existing structures could not always accommodate the group’s needs in schism. Once conflict became manifest, it was difficult to be flexible about process because efforts to resolve the conflict were mixed with efforts to secure a power advantage, and people were reluctant to trust each other. Groups sometimes looked to external facilitation, mediation, or arbitration, perceived as independent and fair—with mixed success.

They bring in the mediator where the situation is already completely out of control....

The resentment is SO embedded, it's really difficult to think that within one or a couple of sessions, you're gonna make it right. (Penelope)

People were less likely to feel powerlessness and righteousness, and a need to breach norms, when they believed processes were being fairly implemented by leaders. Participants described leaders who had knowledge of and were even-handed with the organisation's governance as *strong*.

Leaders who guided groups through schism, described purposefully generating a lived experience of structure, thus supporting needs for certainty, predictability, and identity continuity.

"We're going to continue to do what we do well, it'll be tough, but we'll get there"....

Parents needed to know, not what had caused [the situation], but what we were doing, what we had. (Brian)

In this research, three interrelated leadership breakdowns of a structural type strongly emerged as contributing to schism incidence, escalation, and inflammation. They are termed here underdeveloped structure, dual structure, and weaponised structure, and are discussed in turn.

Informal Versus Underdeveloped Structure. Structure was sometimes underdeveloped, and this was most often observed in smaller, volunteer-led organisations, which were more likely to operate informally.

I still prefer the method... [we] had. You have somebody like [our treasurer]... who has got good systems, to keep things on track. But generally stuff's done by word of mouth and good mates, and—you get things done.... Something run by the rule of law... just sounds horrendous.... We weren't actually driven by the constitution. It was a document that every club has to have, and it was something that sat in a cupboard and was dusty. (Eli)

Eli is describing what is meant here by *informal structure*. Informal structures can still meet human needs for identity, predictability, order, and justice. Informal was observed to be distinct from ad hoc, which included a degree of arbitrariness that was disorienting and frustrating for people. Eli still calls their way of working together a *method* and mentions a specific *somebody* with *good systems* to *keep things on track*. This somebody was unobtrusively providing the committee with formal

structure (tangible, written), to complement their informal routines (routines are a form of structure, and are imbued with systemic power, e.g., Haugaard, 2020).

A relatively informal way of running a club was often a conscious preference for people volunteering. To them it was enjoyable, flexible, and worked effectively. Informality could also evolve from choices made when time was scarce and organising club events trumped policy writing. Informal routines sometimes led to an overreliance on people and network aspects of group leadership and cultural aspects of structure, and to neglect—or naïve optimism—when it came to formal governance structures. This neglect created *underdeveloped structure* leadership tensions.

Ideally, Eli's club constitution would still be robust and up to date, even if dusty. This would be a relatively minor adjustment, not requiring a fundamental change of group leadership philosophy or day-to-day practice. It does require a volunteer capable of and willing to tackle the job of maintaining the constitution. In a number of cases, constitutions were outdated or ambiguous on critical points, and people did search for loopholes. This could lead to contest over meaning, or a bluff sprung as a surprise, and either way had an inflammatory effect on schism. Data also suggested some clubs were not accustomed to using their constitution as a matter of routine, so it was unfamiliar to most members, knowledge levels were low, and there was a large gap between formal process and normal process, which was disorienting for people and open to weaponisation.

An outdated constitution stood out as the most obvious example of underdeveloped structure. People already in schism were looking to gain advantage by the time they read their constitution, and it was too late to use "common sense" to resolve constitutional ambiguities cooperatively. Underdeveloped structure also manifested as people not knowing or understanding their role or when important leader responsibilities were not assigned to a role or person. Failing or nonexistent channels of communication or decision-making protocols were other examples of underdeveloped structure.

Events common in schism exposed underdeveloped structure, and turned leadership tension into leadership breakdown. Examples in the data included when a leader or leadership team had

their legitimacy challenged and their interpretation of how things were normally done was defied; when leaders left the group or stepped down from a leadership role and tacit knowledge was lost; and in one case a normative breach fractured key relationships, tearing multiple network connections. Informal structure relied on tacit knowledge, relationships, and individual people. Informality did work well, as long as the same people remained in leadership positions, as long as their relationships remained amicable, and given they passed on their knowledge before they exited.

Structure provided continuity, whether it was identity or governance. An informal style of group leadership, relying on people and network strengths, could be strengthened in the sphere of structure by recognising that work routines, and the group's actual practice of making decisions, could be reflected in an up-to-date set of policies and a robust constitution. Structure need not impose unwanted formality, and informal structure did not have to be underdeveloped.

Dual Structure. Organisations maintain dual or multiple “decoupled” systems due to the different demands of activity versus legitimacy (Dart, 2004; Meyer & Rowan, 1977; Weick, 1976). Each structure serves a good purpose for the organisation, and this duality is routinely managed. *It is keeping the school unique... but also trying to make it—functional... Maintaining that... friendly feel... those are very difficult things to juggle (Anne).* Competing principles and priorities existed in all the organisations participants belonged to.

In most successful not-for-profits, strategy's actually... driven by executives, and boards rubber stamp them.... We all go through all the motions, but fundamentally... I've already written the strategy.... Bits will get tweaked.... I know that sounds a bit arrogant. But the FACT is... this... fantasy that boards set high level strategy, and management delivers? That's just nonsense. (Isaac)

Isaac was not the only CEO or principal to work this way. The suitability of corporate governance for nonprofit organisations is a complex issue. The relevant point in this section is that workarounds like Isaac described are dual-structure leadership tensions which can be exposed during schism or contribute to schism.

Interestingly, it appeared people and network leadership capacity made it possible to maintain dual structures. When board members trusted the CEO or the principal, they supported their initiatives, and vice versa. But when relationships deteriorated or new people entered the dynamic who did not comply with existing tacit agreements, as happened for Isaac, informal structure (which had operational or cultural legitimacy) was typically overwhelmed by formal structure (which had procedural legitimacy). Isaac told the story of a once-in-a-lifetime initiative that was scuttled.

The board was getting increasingly nervous. And there were people on the board who were white-anting it constantly.... It reached the point... where they HAD to make a decision.... We had all the contracts signed, apart from... our board directors.... They went round and round in circles from January, February, March, April, May... in complete dysfunction. Our board "refused to be pushed" [sarcastic laugh]... The whole thing collapsed. It was the biggest decision... and the most atrocious decision of the company's history. (Isaac)

Isaac articulated an alternate governance structure, and was adamant his organisation could function more effectively. He made the point that board members did not have the knowledge and foresight he had, as an expert in his industry, and realistically could not be the drivers of innovation.

Board[s] come in, intermittently... they don't REALLY understand the industry and the business that well. And yet they have to make the BIGGEST decisions.... I've even had statements like, "Oh, we should just be a little charity again." Ugh. (Isaac)

This mismatch of experience and expertise (and power) particularly applied in the small schools cluster, between principals and their board members, and in some of the social service organisations. A dual-structure tension within the leadership team was not universal, however. The need to bolster board expertise, above the CEO's, appeared to be one driver of external board

member recruitment. Belinda recruited ex-principals and educators along with accountants, and Linda and Elizabeth recruited *superstars* to take the *organisation to the next level*.

It was common to hear evidence from participants, in large and small organisations, that a corporate governance structure did not suit their organisation. This is not an argument whether corporate governance (or any universally applied governance style) is right or otherwise for the nonprofit sector. It is to illustrate how imposing structure for the purpose of legitimacy, induced dual-structure leadership tensions which contributed to schism.

Dual structures were observed in other forms than operations–legitimacy, including the informal–formal and network–structure dualities just discussed. Meredith noted a dual-structure tension created by duplication of equivalent structures. *An organisation had been formed by a forced merger.... There were three boards, plus the fourth board of the combined entity. So, that just created an environment of almost chronic schism (Meredith)*. Sometimes dual structures were managed, other times were associated with tension, breakdowns, or schism. Dual structures were also highly vulnerable to weaponisation.

Weaponisation of Structure. The weaponisation of structure was most often observed as individuals and factions using the power of the constitution, and of other governance processes, to gain advantage. This tactic was implied in stories and articulated by participants. *The constitution is there to guide you, it's not around finding loopholes. Because it's very easy to decide to... interpret things... to your benefit (Penelope)*. Examples of weaponisation have arisen previously: coups, manipulation of memberships, proxy votes, blocking committee nominations, blocking decision making, controlling agendas, calling (or not calling) meetings, and changing constitutions. Weaponisation of structure was often framed as *finding a loophole*, which made it sound like a technicality, but people tended to respond with righteousness, indicating it was interpreted on the basis of ethics, especially when combined with surprise.

One of the most powerful weapons available in the democratic groups studied was voting. “Voting has a magical sacred quality” (Haugaard, 2020, p. 104). Voting was the target of obvious

abuse more often than any other aspect of group leadership. This could be partly explained by the relatively large and fixed power advantage that could be gained through winning a vote. It is also conjectured that the legitimacy inherent in voting, grounded in sociohistorical respect for democracy as an organising principle, is virtually unchallengeable. *They rigged the election... We got... steamrolled. We were outplayed... That's a fact... They just beat us. They flat out beat us (Eli).* Even when people found the process unethical, votes were still upheld, and people saw it as being outsmarted rather than cheated. Weaponising structure with such breaches usually escalated and inflamed schism.

Some participants remarked on other structural features of organisations being used as leverage, including organisational history, identity, and values. *You could say that to a CEO. "Well ultimately, it's about young people, isn't it?" "Yes, it is." So they're not going to say, "No, it's not." So I'd use that as a shield to some degree (Ryan).* In the study, these did not have the same immediate, inflammatory effect.

One of the rationalisations for formal structure is to guard against people behaving unethically, but structural power was used as a weapon. Whether such weapons were used ethically or unethically was a matter of perspective and contestation. People tried to create structures immune to weaponisation but this was acknowledged as an ideal, not a reality, and a temporary fix at best. *Touch wood... I think I've also kind of put in place things so that... it would be very unlikely that we would have another situation like that. In the foreseeable future. With the team that we have (Meredith).* A counterbalance of people and network leadership capacity was important for ensuring structures were not used to construct or perpetuate injustice.

Group Leadership Capacity and Schism

To conclude, group leadership capacity appeared to be the performative element which most enabled people to consciously affect the incidence, progression, and lived experience of

schism. Complementary to this, the breakdown of group leadership capacity was strongly associated with the incidence, escalation, and inflammation of schism.

People, network, and structure sub-elements of group leadership capacity were used by groups in various combinations. All combinations naturally produced some leadership tensions, which could be adapted to or compensated for by strengths or preferences in particular areas. A balance of each sub-element seemed to mitigate risk; the complete neglect of one sub-element seemed to be an unstable situation prone to leadership breakdown. Utilising strengths such as cooperative committee relationships or inspiring leaders, seemed to benefit groups overall. This research echoes others in stressing that group leadership is context based, and “the generalized rules of the institutional environment are often inappropriate to specific situations” (Meyer & Rowan, 1977, p. 355). Imposing ill-fitting, standardised structure onto organisations in this study created leadership tensions, made leading less enjoyable and less effective, induced the development of dual structures, and thereby contributed to schism.

Utilisation of different leadership resources could be dynamic and flexible, adjusted according to current needs and strengths. Leadership choices with inherent tensions were often practical and effective in the short to medium term, though could transfer tension onto other aspects of leadership or develop into a leadership breakdown when circumstances changed. Schism both exposed and generated tensions and breakdowns in group leadership capacity. Schism was observed to trigger a resurgence in commitment on the part of members to contribute to the group leadership capacity of their organisation—*really put their shoulders down and get on with it (Neville)*.

The intersection of leader and leadership literature with what has been identified as schism literature is surprisingly small, especially considering the emergence of group leadership capacity as a prominent theme in the current research. Expert leadership is associated with organisational success and a group’s capacity to resolve conflict and cope with crisis (e.g., Mumford et al., 2007). Crisis literature emphasises the role of leaders but not the context of schism (e.g., Pearson & Clair, 1998). In schism literature, contests over leader roles, leader legitimacy, and founders leaving (or

not leaving) are associated with conflict, factionalisation, and schism (Asal et al., 2012; Balsler, 1997; Balsler & Carmin, 2009; Potz, 2016). The six core models, however, do not feature leaders or leadership. In fact, Dyck and Starke (1999) comment on the surprisingly minimal impact of leaders in their research. The practice of group leadership in schism would benefit from links between schism, leadership, and crisis literatures. Future research could explicate the effects of enacting leadership on meeting human needs and mitigating against the definitional elements of schism. It is likely such research could also be applied to everyday conflict, crisis management, and change management.

Summary of Performative Elements

This chapter focused on the research question “How do people feel, behave, make sense, and respond in schism?” The answer to this question is articulated as three performative elements of a lived experience theory of schism: human needs, balance of power, and group leadership capacity. People’s responses in schism depended on their lived experience of context and events and, most importantly, how they interpreted and made sense of their experiences. People utilised individual and shared sensemaking, sensegiving, and narrative to help navigate schism.

The lived experience of schism was considered, from the very beginning of this project, to be inherently important. A key finding of the research was the degree to which human needs and responses drove schism dynamics; this realisation was pivotal in developing theory. Four emerging lenses were used to explore how human needs affected schism: identity threat, personal–embodiment, crisis, and liminality. The lived experience of schism was stressful. Human needs were perceived as threatened or unmet, which escalated and inflamed schism. First, multiple people in a stressed state was a less than optimal condition for cooperative conflict resolution. Second, actions taken to meet human needs contributed to the development of other schism elements, especially factionalisation. Human needs was named a performative element of schism.

People responded to their lived experience of schism by contesting for resources of power relative to their opposition. The apparent purpose for shifting the balance of power was to control

decisions made in the organisation, and the final outcome of the schism, a purpose distinct from influencing the outcome of an issue. In a low-trust, high-threat environment, considering a win–lose conflict resolution orientation, contesting for power can be considered a natural and rational response. Power met human needs for self-determination, certainty, and justice, and power was perceived as the basis for meeting future needs and determining the direction of the organisation.

The contest to shift the balance of power was explored using four emerging lenses: narrative, organisation, righteousness, and legitimation. Strategy and tactics applied to winning the contest often escalated and inflamed the schism dynamic, especially tactics perceived as illegitimate or unethical. Schism incidence was more likely when power was evenly balanced such that both factions perceived threat to their worldview and the possibility of transformation. Shifting the balance of power far enough to create conditions conducive to contest, appeared to occur more readily in small organisations, democratic organisations, and other organisations where power was distributed. The commonly used metaphor *losing the battle but winning the war* was apt, since multiple shifts in power occurred as people fought—with move and countermove—to end the conflict in their favour. A decisive shift in the balance of power toward one faction usually symbolised or triggered a climax or resolution of the schism. The stability and time horizon of this resolution depended on the winning faction's capacity to stabilise the power shift. Power was fixed most securely when the opposition faction left the organisation, voluntarily or by exclusion.

Introduced concepts and terms—group leadership capacity, leadership tension, leadership breakdown, and leadership network—help explain how the emerging nature of leadership in groups was observed to interact with schism dynamics. Group leadership capacity is defined as the capacity of the group to harness available leadership resources and collectively enact leadership to meet the needs of the group. Group leadership capacity is comprised of people, network, and structure sub-elements, and emerged as the third performative element of schism. Group leadership capacity was observed to be multifaceted and dynamic. Organisations selected, with various degrees of deliberation, which aspects of leadership to utilise in their current context. Group leadership

capacity was pivotal to the lived experience of participants, providing security, continuity, the embodiment of identity, agency, support, predictably, and justice. Breakdowns in group leadership capacity were associated with schism.

When aspects of group leadership capacity broke down, human needs were not met, which tended to reinforce the development of factionalisation, worldview impingement, transformation, and contest. On the other hand, group leadership capacity mitigated against development of the definitional elements. Group leadership capacity was the most powerful and accessible lever available to organisations for increasing agency and control in schism.

The three performative elements explored in this chapter: human needs, balance of power, and group leadership capacity, are incorporated into the lived experience theory of schism, LETS, presented in Chapter 6.

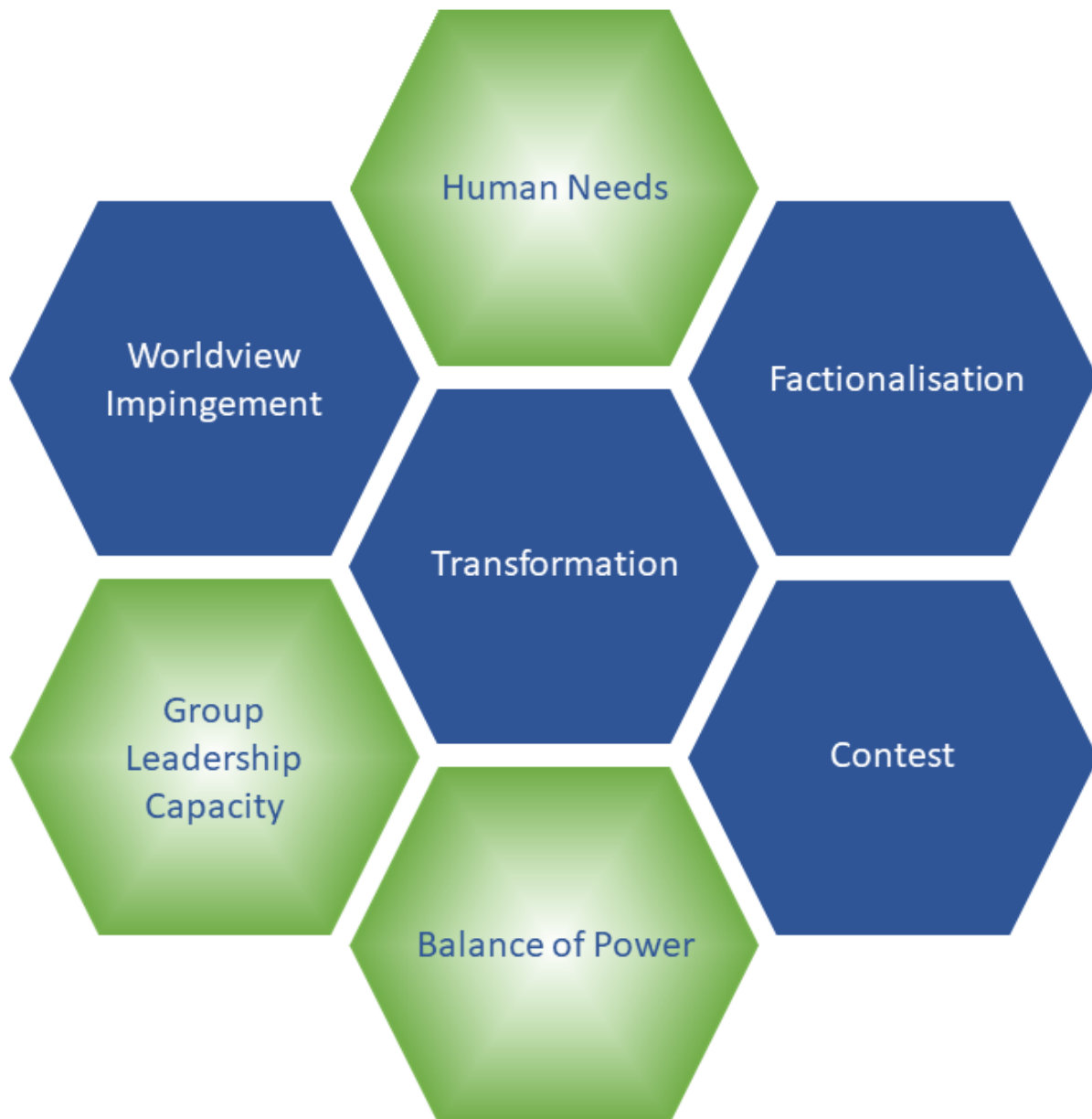
Chapter 6 Lived Experience Theory of Schism (LETS)

The need for a general definition and theory of schism was established in the literature review. No theory or model found integrates collective knowledge about schism and none is generalisable across disciplines. There were strong enough parallels, however, to surmise authors were studying the same phenomenon, therefore it was reasonable to assume differences in research findings were theoretically explicable. The lived experience theory of schism (LETS) is a novel conceptualisation made possible by applying a lived experience lens. One aim of this project is to generate debate and research on this sparsely examined but socially significant phenomenon. LETS is presented here for consideration as a robust, generalisable, and practical theory of schism.

This chapter begins by presenting LETS, combining the new definition of schism proposed in Chapter 4 with the performative elements from Chapter 5. The second section is an analysis of one participant's story, using LETS to connect the local and particular to abstract concepts in the theory. The third section elaborates how LETS integrates and advances the literature. Last is a discussion of how new theoretical understanding and knowledge can enhance human agency and control in schism.

Lived Experience Theory of Schism (LETS)

LETS posits that incidence, progression, and lived experience of schism are dependent on dynamic and complex interactions between four definitional elements of schism—worldview impingement, transformation, factionalisation, and contest—and three performative elements—human needs, balance of power, and group leadership capacity (see Figure 7). In particular, the social dynamics that characterise schism are driven by people acting to meet human needs and people contesting for power, and are regulated by the capacity of the group to enact leadership.

Figure 7 Lived Experience Theory of Schism (LETS)

In Figure 7, definitional elements are represented by four blue hexagons (white text) and performative elements are represented by three green hexagons (blue text, gradient background). Placement of the hexagons is intended to convey the complex interrelationship between the elements, the iterative way they develop, and the nonspecific temporal order in which they are identifiable. Each element interacts with all other elements, so arrows indicating relationships between elements would complicate without adding value and have been deliberately omitted.

Foundational Principles of LETS

To build robust, testable, generalisable theory from empirical case data, it is important to be explicit about goals, methods, and assumptions (Eisenhardt & Graebner, 2007). LETS rests on an understanding of the world inherent in a social constructivist paradigm, as well as inductive and abductive conclusions about the nature of schism based on this research. These conclusions are stated here for completeness and transparency.

- A general theory of schism in a social system is possible (Chapters 2 & 4).
- Schism is defined as a complex social process identified by the concurrence of four interacting elements: worldview impingement, transformation, factionalisation, and contest (Chapter 4).
- The social construction of schism is complex. It occurs in multiple dimensions, including time. A theory of schism should exemplify this complexity (Chapter 4).
- A theory of schism should address schism incidence, progression, and lived experience, and be capable of representing schism as a phenomenon of social systems, the state of a social system at a point in time, and a complex process of social construction (Chapter 4).
- Complex human, relational, and contextual interrelationships are the key to understanding observable patterns and variations in schism, rather than associations between schism incidence and discrete events or contextual factors (Chapter 6, Complexity of Cause and Effect, p. 230).
- Organisational, group, and civic boundaries are social constructions. They change with context, perspective, and time. They are permeable to people, relationship networks, knowledge, values, resources, and power. Defining the boundaries of the social system of interest is not necessary in a theory of schism and may be counterproductive. This does not invalidate boundaries perceived or defined by stakeholders, including membership of the social system (Chapter 6, Boundedness, p. 231).

- Schism is a natural phenomenon of social systems. No normative judgments are necessary in a theory of schism, and may be counterproductive. This does not invalidate the consequences for groups or the lived experience of people, which may be perceived as positive and negative at different times (Chapter 6, Normativity, p. 234).

The above principles form a foundation for LETS. Complexity, boundedness, and normativity are discussed later in this chapter in the context of LETS advancing schism theory. Before that, each element of LETS is reviewed, and the use of LETS as an analytical tool is demonstrated.

Elements of LETS

This section reviews the elements of LETS. The four definitional elements of LETS identify an episode of schism, and reconcile inconsistencies between existing models (Chapter 4). The three performative elements expand the power of LETS as a tool for understanding social dynamics in schism, thereby increasing agency to affect schism in more predictable, effective ways (Chapter 5).

Definitional Element—Worldview Impingement. Worldview impingement refers to conflict or tension between worldviews including a degree of perceived impingement or mutual exclusivity. Existing schism models include concepts which can be seen as creating a perception of worldview impingement, for example, breach of norms (Turner, 1980), perception of identity subversion (Sani, 2008), and change ideation (Dyck & Starke, 1999). Worldview impingement can also occur when change in the environment forces change on the organisation (Balsler, 1997; Shriver & Messer, 2009). Worldview impingement may be constructed to rationalise existing conflict (Desan, 2019). It is normal in any society for conflicting worldviews to exist. This definitional element is present when both subgroups perceive their worldview is impinged.

Definitional Element—Transformation. Transformation refers to actual or potential transformation, which participants may experience as opportunity or threat, disjuncture with the past, or an uncertain present or future. Transformation is implicit and sometimes explicit in schism literature, for example, change as a trigger for schism (Potz, 2016; Sani & Reicher, 2000), and schism

as a way groups and societies are transformed (Gorup & Podjed, 2015; Turner, 1980). Factions may identify as change versus status quo (Dyck & Starke, 1999; Sani & Reicher, 2000). Perceived potential for transformation is definitional of schism, independent of whether change actually occurs.

Definitional Element—Factionalisation. Factionalisation is the adoption of conflicting worldviews by people who identify as a social group and have agency as a collective. Being a member of a faction meets human needs for identity, affirmation, support, and power. Identifying as a subgroup creates the desire to differentiate from, and make comparisons with, other subgroups, and these ingroup–outgroup dynamics generate negative affect toward members of the opposing faction (Tajfel & Turner, 1979). Factionalisation is therefore self-reinforcing, and tends to escalate schism. Factionalisation is common to all schism literature.

Definitional Element—Contest. Contest describes a schismatic form of conflict between factions, characterised by negative affect, active engagement, and a win–lose mindset. All schism literature refers to conflict, but using the term contest is helpful to distinguish tension and everyday conflict from schismatic conflict. Contest connotes competition, as opposed to cooperation, and aptly describes the distinctive conflict experienced in schism. Factions contest in multiple dimensions and, ultimately, they contest for power to control the outcomes of schism.

Performative Element—Human Needs. Some human needs emerged from data as particularly salient during schism. The way people respond to fill these needs, which they experience as threatened or unmet, is the key to understanding familiar patterns of schism progression. People experience schism as identity threat, personal and embodied, crisis, and liminal space; these four emergent lenses for exploring participant needs and responses in schism are outlined below.

Identity Threat. People feel threatened and judged in schism. They express a need for self-determination, for their personal and social identities to have meaning and value, and to be able to enact those identities. People display a human need for ontological security.

Personal—Embodiment. Schismatic conflict feels personal, not issue based, and people feel attacked, vulnerable, and isolated, and feel an urge to defend themselves. People express a need for

safety (physical and psychological), security, and justice, and people fear and experience loss and hurt. People sense threat and manifest stress in their physical bodies, and often understand and express themselves using embodiment metaphors. The contest is enacted in physical spaces.

Crisis. Schism is experienced as crisis-like, and people often feel powerless or consumed by the schism experience. People experience surprise, chaos, uncertainty, stress, time pressure, and existential threat. People express a need for order, certainty, control, and action, and they undertake sensemaking to understand the situation, their role, and what action to take.

Liminality. People feel a sense of disorientation in schism. Liminal space is ambiguous and novel, experienced as stepping into the unknown and unpredictable. People perceive a breakdown of cause-and-effect relationships and of structure in liminal space, and express needs for security (including leaders and group leadership), predictability, and justice.

Human needs, and people's instinctive responses to meet those needs, emerged from the lived experience data as pivotal to understanding schism dynamics.

Performative Element—Balance of Power. The balance of power is a dynamic, context-specific social construction, and a representation of the relative power of each faction. Individuals and factions respond to schismatic conditions by contesting for power and contesting for power drives schism dynamics in turn. Relative power is a determining factor in schism outcomes. Four sub-elements of balance of power shed light on how factions develop resources of power: narrative, organisation, righteousness, and legitimation. These are summarised below.

Narrative. Creating and communicating a narrative is a resource of power in schism. Human needs for certainty and action are aided by sensemaking, but narrative adds extra dimensions of morality and characterisation, as well as overlaying familiar stories with possible endings. Narratives are not only descriptive, but constructive of reality. In schism, narratives are dynamic, multiple, and contested, and are central to faction identity, recruitment, and shared strategy and goals.

Organisation. Factions in schism develop functions and characteristics typical of a formal organisation, including leaders, members, identity, goals, strategy, communication channels, and

decision-making protocols. Organisation within a faction meets human needs for order, action, goal achievement, and power. As each faction develops more characteristics of an independent entity, these add to the dimensions of difference between the factions, and are new areas of contestation.

Righteousness. Energy, engagement, and commitment are raised when people's sense of justice, their loyalty, and their emotions are engaged. Schism generates a sense of righteousness, which can drive schism escalation and loss of perspective. Sensemaking based on right and wrong is common. Once people take an ethical stance on an issue or a person, this judgment tends to be reified as knowledge, and other rational–logical and action-oriented sensemaking is built upon it.

Legitimation. All power claims in schism are contested, and conditional on being perceived as legitimate, which is also contested. Tests of legitimacy are applied to resources of power, to the exercise of resources of power, and to the people embodying or exercising resources of power. Legitimation, a process of rationalisation (cognitive) and justification (normative) (Berger & Luckmann, 1966), strengthens and stabilises power.

Balance of power is a performative element of LETS. Contesting for power is a response to schismatic conditions in a social system and contributes to the development of schism. This element is named for the observation that when the power of factions is sufficiently balanced a contest is able to occur, enabling incidence of schism. A decisive shift in the balance of power often signals winning the contest and the end of an episode of schism.

Performative Element—Group Leadership Capacity. Group leadership capacity is the capacity of the group to harness available leadership resources, and collectively enact leadership to meet the needs of the group. Group leadership breakdowns create schismatic conditions. Group leadership capacity is significant for applying human agency and control in schism, and therefore affects the capacity of the group to navigate schism and improve experiences and outcomes. Group leadership capacity is divided here into sub-elements: people, network, and structure.

People. Individual people play significant roles in the collective experience of schism. Leader exit, absence, and perceived unsuitability are associated with schism. Expert leaders strengthen

group leadership capacity. Trust in leaders meets human needs for security and affirmation, and leaders embody the group and the group's identity. Individuals who ignite conflict in groups are perceived as schism-makers.

Network. The leadership network metaphor assumes whole group responsibility for, and construction of, group leadership capacity. The network signifies the importance of people and their relationships, personal and functional. Strong networks are dynamic, balanced, flexible, have built-in redundancies, high connectivity, and are infused with trust and goodwill. Networks can reach across boundaries, strengthening organisations internally and within wider social systems. Networks enable synergy, flexibility, support, human connection, risk management, shared achievement, and social enjoyment.

Structure. Human needs for predictability, stability, justice, and agency rely on structural elements of group leadership capacity. These include governance, identity, mission, values, culture, professional codes, societal expectations, sociohistorical context, and societal narratives. Structure is important for maintaining continuity through change, and predictability and transparency of process. Structure can be weaponised, especially when large gaps exist between dual structures (e.g., everyday process v. formal process).

Group leadership capacity appears to be the performative element affording individuals and groups a degree of agency and control in schism. Group leadership capacity can be constituted in different ways, depending on the philosophy, needs, and resources of the group. Aspects of group leadership are often in tension but may still be functional. Breakdowns in group leadership capacity are identifiable in each schism in the study.

The four definitional and three performative elements named in LETS are complex social constructions in themselves and develop in an interconnected and iterative manner. A more complete and nuanced theoretical understanding of schism dynamics has the potential to increase the degree to which incidence, progression, outcomes, and experiences of schism are subject to human agency in practice.

LETS Applied to Analysing Neville's Story

The above section introduced LETS, stated foundational principles, and reviewed the seven definitional and performative elements of LETS. In this section, a selection of quotes from one of the cases in the study illustrates how LETS can be used to analyse observations and events in a schism.

Everyone's schism experience was unique, but Neville recounted an experience containing themes familiar to many of the volunteer-led nonprofit organisations in the study. Quotes from Neville's schism story are contained in Table 13. The quotes are aligned with analytical comments which highlight the presence of each schism element; interactions between elements; effects on the schism dynamic; and instances where the aspect of schism illustrated by the quote was common to other cases. Graphics in the central column represent LETS elements evident in the quote (Figure 7 is repeated here for ease of reference). As can be seen from the graphics, by the time Neville had *set the scene* as he put it, all four definitional elements of schism could be detected in club dynamics. This case can therefore be identified as schism according to the proposed new definition.

Figure 7 Lived Experience Theory of Schism (LETS) (Reproduced)

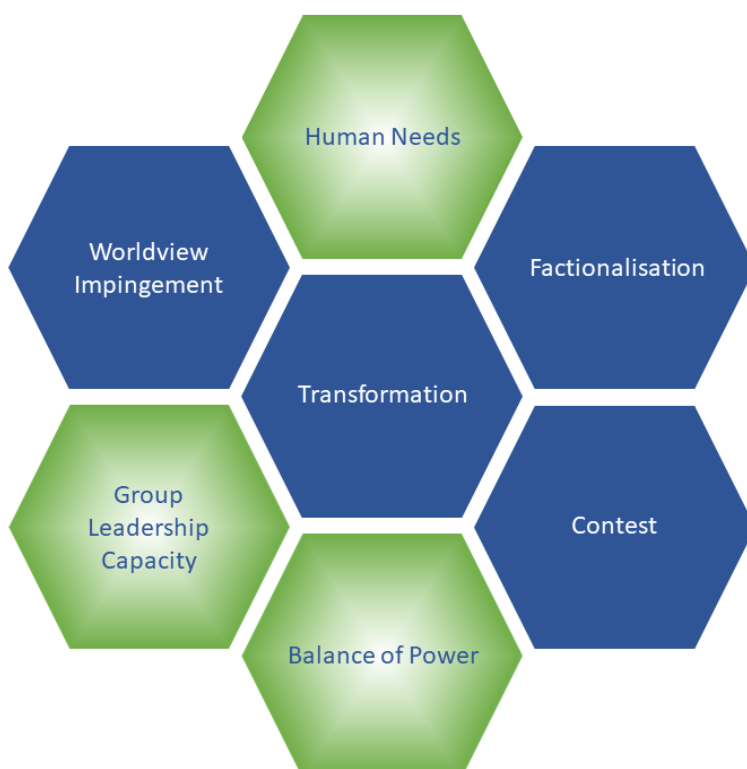
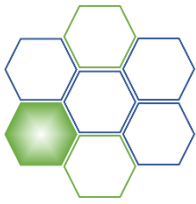
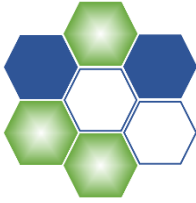
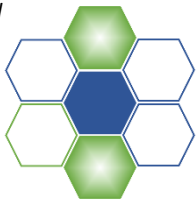


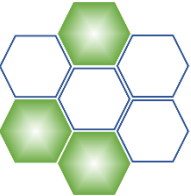
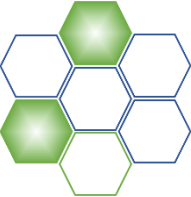


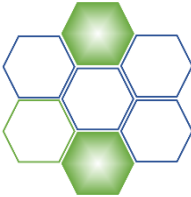
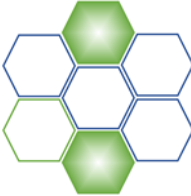

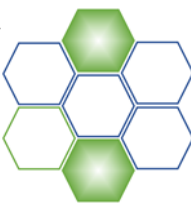
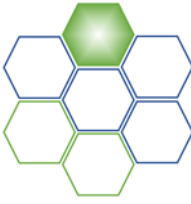
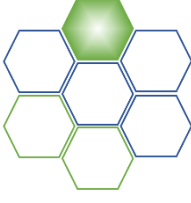

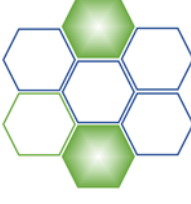



Table 13 LETS Applied to Analysing Neville’s Schism Story

Neville’s Story	Elements	LETS Analysis
Setting the scene, understanding the power dynamics and the perceived problem		
<p>Our major fundraiser was a... market... once a month.... The market committee, which was a splinter group of the board and the membership, became the “owners” of this market.... And they took ownership of the money, as well.</p>		<p>Group leadership strength (network). Taking responsibility to maintain a club activity; this may have been the case for some time.</p> <p>Leadership tension (structural). Volunteers (not board) were in control of a club activity and resources.</p> <p>Meanwhile, the amount of money grew more significant.</p> <p>Claim to <i>ownership</i> of resources was not yet contested.</p>
<p>When the club needed some money, the board or the membership or the treasurer had to go on bended knee and ask the market committee for some funds. And it got to the stage where the boys on the market committee were making decisions on whether they would release funds for particular projects.... And they became all-powerful in themselves.</p>		<p>Factionalisation. Language aligns <i>club, board, and members</i> as the whole group versus <i>splinter</i> market committee (<i>splinter</i> from previous quote).</p> <p>Human needs. <i>Bended knee</i>. Metaphor indicates perception of a subservient power position. People understood and expressed complex ideas and strong emotions with embodiment metaphors.</p> <p>Leadership breakdown (structure). Power to decide projects was usurped from the board by the market committee.</p> <p>Worldview Impingement. Improper use of power heightened resentment and awareness of structural conflict.</p> <p>Power. Claim to ownership of the market funds was now manifest and problematic. Perceived as a cause of schism.</p>
<p>[The incoming] president... could see the... problem with this current financial situation... He made moves within the board to get the market funds in the main fund.</p>		<p>This was a pivotal moment, perceived as the schism trigger.</p> <p>Power. Incoming president acted to increase his power relative to the market committee, by making <i>moves</i>, in order to contest the current situation.</p> <p>Human needs and transformation. Identity threat seems likely for members of the market committee when the status quo supporting their position was threatened.</p>
<p>This caused... quite a ruckus... and factions started to form.</p>		<p>Human needs (crisis) and contest. Connoted by <i>ruckus</i>.</p> <p>Factionalisation. Overt in the group, explicit in the narrative.</p> <p>Almost no participants initiated the use of the term <i>conflict</i>, and few were familiar with the term <i>schism</i> before being involved in the project.</p>

Neville's Story	Elements	LETS Analysis
<p>The market committee were the older, established members of the club and they tended to grab the more older, established members on their team. And the newer members, including myself, could see the stupidity of this arrangement.</p>		<p>Factionalisation. Friendship and longevity in the club were common criteria to divide groups.</p> <p>Contest. <i>Team</i> is a sport metaphor which, along with war metaphors, represent the conflict as a contest.</p> <p>Power (narrative). Tactics to garner support for change included the narrative that the current arrangement was <i>stupid</i>.</p>
Complicating events, threat perception, personalisation, loss of control, whole club engagement		
<p>One good example was that... most presidents... liked to have a major project in their year. And in my particular year.... I put [my project] to the board, who agreed that it was a good idea, so then we had to go cap in hand to get the money from the market group, who weren't particularly keen, in fact they were anti.</p>		<p>Human needs (personalisation and identity threat). Neville was faced with being denied his tacit right as president to undertake his project.</p> <p>Power. <i>Cap in hand.</i> Embodiment metaphor that indicates perception of a subservient power position.</p> <p>Leadership tension (people). One-year terms for presidents means leader turnover and discontinuity, commonly observed in schism. The club values this convention for the leadership network benefits of shared responsibility and effort, and they accept the trade-off.</p>
<p>At the time our constitution didn't allow [member consultation on significant spending] but we could've done it anyway, as a matter of harmony. But I didn't, ignorantly didn't, put it to the members, I just put it to the board.</p>		<p>This was a pivotal moment, in retrospect.</p> <p>Leadership tensions. Neville acknowledges <i>ignorance</i> of his procedural options as well as the potential consequences of his action. Evidence of dual structure: the choice existed to follow the constitution or do what seemed right for people at the time.</p> <p>Human needs. Judging (including self) retrospectively was common but is problematic because it rarely considers what was known and unknown (e.g., the group response to Neville's action, other options) or the chaotic environment and cognitive stress at the time the action was taken.</p>
<p>And, as a consequence of that, the whole club started to fragment and disintegrate.</p>		<p>Worldview impingement and human needs. Existential threat to the club is perceived. This is often experienced as identity threat and crisis.</p> <p>Human needs. <i>As a consequence.</i> Neville assigns cause and effect often in his story. People used sensemaking to connect events, reducing sense of liminality, unpredictability, and arbitrariness. People felt better when they believed they knew why things happened.</p> <p>Factionalisation. <i>Fragment</i> is language implying broken, and has a negative connotation.</p>

Neville's Story	Elements	LETS Analysis
<p><i>It got to the stage where the [umbrella organisation]... were asked to move in... and run an independent meeting, at an independent venue, so that they could let everyone vent their concerns, and try and solve the problem and get the club back on its feet, because we were getting quite a few resignations and the club was in danger of collapsing.</i></p>		<p>Worldview impingement. The decision to get help is often taken when existential threat to the club is perceived (<i>danger of collapsing</i>). High and perhaps unrealistic expectations of what a meeting may be able to achieve are common, given the state of interpersonal relationships.</p> <p>Contest. Calls for help from an outside authority can come too late for reconciliation. They can be perceived as a public admission of loss of control over the conflict resolution process and an admission of the need for arbitration to decide the contest.</p> <p>Power. Perception of independence, objectivity, and fair process is desired but not always reality. External authority can be used to bolster the power of either faction.</p> <p>Group leadership capacity. People often believe the next effort at resolution will work (to resolve conflict or to win the contest). Multiple attempts are common.</p> <p>Human needs. <i>Vent</i> signifies a need to release stress, overwhelmingly experienced by people during schism. <i>Back on its feet</i> is an embodiment metaphor.</p>
<p><i>The whole club went.... Everyone wanted to put their two-bob's worth in.</i></p>		<p>Power. Emotion and righteousness engages members. A palpable energy draws people in and helps them contribute to resolution and to persevere; downsides of righteousness are losing perspective and public group conflict (and the associated stigma).</p> <p>Human needs. For self-determination and action.</p>
<p><i>People [were] saying that the likes of myself and the current president... didn't have enough [club] experience, even though I'd been a member for seven years!</i></p>		<p>Power. An affront to Neville's personal identity, and his legitimacy to claim membership, prompted indignation.</p> <p>Human needs. Belonging, identity, and respect.</p>
Personal attack, embodiment, abuse of power, weaponisation of governance, battles and wars		
<p><i>They called a special meeting, about [a parallel conflict]. And it was quite a strange, it was quite an upsetting meeting for me... I think the vote was three for, and three against... But because one of the power-play boys supposedly had two positions in the club... I don't know what he was, treasurer and market director or something, he demanded that he have two votes. Which swung the result.</i></p>		<p>Power. Tactics used for gaining a power advantage: surprise, bluff, and weaponisation of governance.</p> <p>Leadership breakdown. Made possible by the constitution being nonspecific on the issue (structural) and weaponisation of dual structures (people unused to working from the constitution could not answer in the moment). This was an event resulting in schism escalation and entrenchment of ill will and distrust (network breakdown).</p> <p>Contest. The <i>two votes</i> claim was a bluff. Surprise and bullying often worked to win battles. Unethical tactics can backfire in the long run if the war is not won. There is always another battleground.</p>

Neville's Story	Elements	LETS Analysis
<p><i>This meeting was sprung on me.... One of the power brokers was the president at the time. So, I had no preparation, and it was obvious that it was the "bully boys" against me, personally.... And I suppose it was like a gang attack, from when you were at school, or something. It... really really upset me.</i></p>		<p>Human needs. The language Neville uses, a school <i>gang attack</i> by the <i>bully boys</i>, evokes powerlessness in the face of a personal attack.</p> <p>Power. Collective tactics and strategy are used by factions. Abuse of power is a dark side of strategy in schism.</p> <p>This meeting made a strong impression on Neville. He became quite emotional retelling it, and it is noteworthy he remembered this in detail and yet did not recall how the actual issue was resolved in the end, though he got around the block somehow.</p>
<p><i>I... don't know what I did about it. I think just time healed it all. Mm. Very upset I was.</i></p>		<p>Human needs. Time for healing was a common theme (sometimes a long time, many years). People regained some perspective once they were out of the crisis-like environment with intense relationships and frequent interactions.</p>
<p><i>Where you're not prepared, and... it's a huge shock. Your mouth dries up, you can't think properly, yeah, that's the thing, you can't think, well I can't.</i></p>		<p>Human needs. Crisis, cognitive stress, <i>can't think</i>. These were features of the lived experience of schism.</p> <p>Neville had a physiological response to feeling personally attacked (embodiment).</p>
<p>Reflection, retrospective sensemaking, legitimation</p>		
<p><i>So, it was a war that had to be had.</i></p>		<p>Contest. War metaphors were common, and connoted high stakes and commitment, and the idea that it was necessary to fight for what is right.</p> <p>Group leadership capacity. Neville's retrospective judgment was that schism (<i>war</i>) was needed to realign governance. This may or may not have been the expectation at the beginning. An outside observer may suggest a common-sense negotiation should have resolved it, and this can lead to negative judgments about the group and their leadership and conflict resolution processes. But they were not there.</p> <p>Human needs. What was evident was how important people's personal identities, power, and status in a group are to them, and that power is distributed as it "should" be.</p>
<p><i>And consequently, it's now working quite well.</i></p>		<p>Power. Retrospectively, people often confirmed the myth that everything turns out for the best. This use of narrative served good purposes, including legitimating the victors, the conflict, actions taken, and the new distribution of power.</p> <p>Human needs. Narrative reduced people's sense of arbitrariness (a feature of liminal space) and helped people heal. People were comforted when they believed the fight was necessary to achieve an end.</p>

Neville's Story	Elements	LETS Analysis
<p><i>So, this sort of conflict can... shake the club, and you will lose members. And the club can move on and it's possibly a good thing. To sieve out the members that are dragging the club behind.... Big shakeups like that usually work out for the better, 'cause the club has to really put their shoulders down and get on with it.</i></p>		<p>Transformation. <i>Big shakeups.</i> Implies uncontrolled change, possibly with collateral damage.</p> <p>Human needs. <i>Shake the club</i> evokes the liminal state between then and now.</p> <p><i>Put their shoulders down</i> is an embodiment metaphor, this time to denote the hard work of recovery.</p> <p>Factionalisation. <i>Sieve out</i> and <i>dragging</i> is language which rationalises member losses as a good thing. Retrospectively, people accepted member losses they would not have countenanced at the beginning. This is a characteristic of ingroup–outgroup dynamics, and seeing former members of the same club as members of the outgroup.</p>

In analysing Neville's story, LETS has been applied to explaining the dynamics of a particular schism. The theory can do more than explain, however, and further applications of LETS in practice are explored later in this chapter. Before moving on, the next section outlines how LETS is an advance on schism theory in existing literature.

LETS Advances Current Theory

LETS was developed in response to the emerging research goal to advance theoretical knowledge of schism. Grounded in data, LETS defines what a schism is, provides clear definitions of elements, and distinguishes schism as a unique social phenomenon. LETS provides a robust conceptual framework for exploring why and how schisms manifest in social systems, what they look like, and how they are experienced. LETS does not arbitrate between models of schism in the literature, rather it provides a fresh perspective enabling seemingly contradictory knowledge from multiple disciplines to be integrated. This section articulates theoretical tensions arising during the research, first reviewing concepts from Chapter 4 but focusing attention on concepts which have not yet been discussed in depth: complexity, boundedness, and normativity. Arguments are made for the theoretical robustness and generalisability of LETS.

LETS is Conceptually Precise

Particular attention has been paid to defining elements of the new definition and LETS. Variations from and refinements to language in the literature have been signalled and justified. A minimum number of new terms have been introduced, when existing language did not seem to adequately capture an emerging theme or existing terms could be misconstrued. Introduced terms are defined in text in the relevant sections and compiled in the Glossary. A significant difficulty in this research has been the lack of shared language and well-defined concepts to build on. The aim here has been to ensure the meaning of terms and concepts is clear in the context of this work and, as a lexicon, terms are complementary and based on a consistent and explicit episteme.

Review of Advantages of Proposed New Definition

The proposed new definition conceives of schism as a social construction involving complex interactions between four definitional elements. By using a complexity frame rather than a linear process model and claiming that mass exit is not a defining event in schism, contradictions in the literature are obviated and there are gains in explanatory power, robustness, and generalisability.

The Start and End of an Episode of Schism. The new definition provides a straightforward (if necessarily subjective) way to distinguish when a schism episode starts and when it ends. As discussed in Chapter 4, it is useful to be able to distinguish an episode or experience of schism from everyday life. A schism starts when all four definitional elements are perceived to be present in the social system. What might be considered a trigger event may coincide with a particular element coming to people's attention at the same time they detect the onset of schism. What might be considered contextual factors or underlying causes are the conditions vis a vis other elements already in place, which may not be readily linked with schism onset: for example, a transformation like professionalisation (Kalifon, 1991). Schism ends when at least one element is no longer manifest.

In Neville's story, a conflict became a *war that had to be had* (a schism) once all four definitional elements were identifiable. The market committee were perceived to be approving or

denying projects when this should have been the board's decision (worldview impingement); *and* the incoming president took action to change this (transformation, of power and identities); *and* the market committee members refused this change in status and control (contest); *and* people took sides (factionalisation). The schism apparently ended at the whole group meeting where the balance of power was made explicit to all present. The balance of power was likely symbolised by way of a vote, to affirm the decision to rearrange the finances as the incoming president had advocated: contest decided, transformation achieved, war won.

Generalisability. The proposed new definition is more generalisable than models found in the literature. Contradictions between literature findings include, for example, whether conflict precedes factionalisation (Minahan & Inglis, 2005; Turner, 1980) or vice versa (Bateson, 1935; Hobbs, 2011), and whether ideological difference triggers schism (Sani, 2008) or may be constructed by factions as they differentiate their identities (Desan, 2019). In schism, any narrative version of events—this happened so, consequently, that happened—will be contested. Definitional elements of schism are more accurately depicted as socially constructed in an iterative, interdependent fashion, not one at a time. In the new definition, there is no need to specify the order in which elements manifest, and inconsistencies between temporally dependent models lose relevance.

Models depict different triggers for schism, and this can also be reconciled. For example, identity subversion as a trigger is consistent with cases studied by Sani and colleagues (Sani & Pugliese, 2008; Sani & Reicher, 2000; Sani & Todman, 2002) and is integral to the social psychological model of schism (Sani, 2008). Identity emerged in this research as an important theme in schism, but (a) identity transformation can occur without schism, and (b) identity subversion is not named as the triggering mechanism in all models of schism, nor observed as the trigger for all schisms in case literature or the current data. These two observations are explained below, using the new definition.

The new definition posits schism does not manifest until all four elements are present. It may also be inferred that identity subversion induces a perception of worldview impingement and transformation, but not necessarily factionalisation and contest. Logically then, it is possible to have

a transformation of identity with or without schism. Models depicting schism being triggered or caused by single events or contextual factors do not consider the need for all four elements to develop. A single factor/schism association will hold, according to the proposed new definition, only when the factor being tested is linked to the last of the four definitional elements observed to manifest. This is likely only in highly similar circumstances (e.g., research sample, religious order). However, if the four definitional elements are conceived as developing iteratively and manifesting in any order, then any event or contextual factor (including but not exclusively identity subversion) that drives development of one or more of the four elements can appear to be the trigger for an episode of schism. This explanation better matches case studies and data and reconciles inconsistencies between literature models of schism. The proposed new definition represents schism in a wider variety of contexts and is more generalisable than existing models in the literature.

Claims of Causation. Existing explanations for why certain contextual conditions or events are linked to schism in one instance but not another are unsatisfactory. Links have been made in the literature between schism incidence and, for example, distributed power (Gamson, 1975), contested leadership (Asal et al., 2012), loss of founders (Balsler & Carmin, 2009; Potz, 2016), and pre-existing subgroups (Shriver & Messer, 2009). But these conditions can also exist without precipitating schism. The identified links are significant, not for the strength of the association or correlation (which is low), but for the performative effects of speculation about why they purportedly exist. Desan (2019) found Gamson's speculations plausible, and reiterated them in his literature review.

As Gamson (1975) has noted, heterogeneity is a natural feature of all organizations, whereas not all organizations are prone to schism. Schisms thus do not simply express heterogeneity, but rather represent an institutional failure to solve the problem of internal conflict. (Desan, 2019, p. 683)

Desan's claim is one of many that problematises conflict and blames internal systems. The claim uses circular reasoning, and it ignores the fact that schism is one resolution to a conflict. Such claims do not help improve schism management, and arguably generate stigma and conflict avoidance (and

avoidance of the purportedly associated factor). Schism is not a pass–fail situation and cannot be judged only by whether it occurs or not. If there absolutely must be a test, the measure ought to be whether the best outcomes *under the circumstances* were achieved, in all dimensions of schism, not just whether schism occurred but how it progressed and was experienced.

It has been suggested that researchers explore whether schism is more likely when the issue dividing the group is ideological rather than operational (Sani, 2005). This question may stem from conjecture that some schisms may be unavoidable, and therefore excusable, due to irreconcilable ideological differences, whereas others should be avoidable or at least controllable, such as those over scarce resources, strategy, or personalities. This has implications for how groups are judged, since perception of control increases degree of stigma (Devers et al., 2009). The current research suggests the type of conflict may play a role in likelihood of schism incidence, but the human response to the conflict experience plays a larger role, and schisms occur over seemingly trivial issues. Significantly, it was also noted that ideological schism may be *perceived* as more legitimate, consequently eliciting lower levels of stigma. The evidence for this supposition is that schism was often framed, including retrospectively, to appear more high-minded, palatable, or unavoidable. Indeed, this is the very phenomenon featured in Desan’s (2019) frame-breaking case study.

Knowledge claims are shaped into valid knowledge through discourse, and while this can be done naïvely, the consequences can be dysfunctional (Holford, 2020). Conjectures like those discussed above—that some schisms are more justifiable than others or that schism incidence equates to a failure of conflict resolution—can be talked into being. This research suggests these knowledge claims have been accepted as rational explanations when they are not supported theoretically and are, at best, only part of the story. The theme of performativity in this thesis is echoed here, in that a theory can be performative—theory can be brought into being in social reality (Gond et al., 2016). It is therefore not only more representative of reality and more useful but also more responsible as a schism theorist, to consider a constellation of interacting elements rather

than a discrete event or contextual factor as causative of schism. The proposed new definition and LETS define those elements.

LETS Foundational Principles: Complexity, Boundedness, and Normativity

This section elaborates on three foundational principles underpinning LETS which were introduced at the beginning of Chapter 6, namely complexity, boundedness, and normativity. Conclusions about complexity, boundedness, and normativity were derived inductively and abductively, based on accurate fit with lived experience data, with the goal of minimising distortions due to unnecessary or unintentional assumptions about the phenomenon being represented. This attention to ontology and epistemology, of schism and of the social system, enabled a more rigorous and generalisable theory to be developed compared to other models in the literature.

Complexity of Cause and Effect. What causes social systems to schism has been a particular concern of schism researchers, yet findings to date are unconvincing. Causation was considered and reconsidered during this research. The rejection of a linear group process model in favour of complexity implied rejecting the idea of simple, direct, temporal, cause-and-effect relationships. Participants, however, often used language to infer or make outright claims of cause-and-effect links. Causation seemed important to participants for rationalising, justifying, making sense of their experience, orienting themselves in unstructured liminal spaces, and also for healing. But the notion of there being one or even several deterministic causes of schism was not supported by data. In the data, perceived causes were contested, multiple, and changed over time with hindsight and shared sensemaking. Participants described moments where, in retrospect, if another choice had been made, outcomes may have been different; these moments were multiple, rarely singular.

A feature of LETS is the complex interaction between, not just the seven elements, but sub-elements like embodiment or leadership network, right down to specific details like individual personalities, tactics used to legitimise elections, or what society expects of a nonprofit board. This multiplicity of factors allows for a vast number of micro-level cause-and-effect exchanges, enabled

and constrained by countless human and structural contextual factors. In keeping with the theory of complex systems and the paradigm of social constructivism, this seems a fitting representation of schism construction.

Researchers and practitioners can benefit from understanding the connections between prevailing conditions in schism, the way systems and circumstances constrain and enable, and human needs and agency in schism. What this research already highlights is that micro-level cause-and-effect exchanges in schism often do not conform to cognitive–rational logic, as is often expected in organisational decision making and conflict resolution. Rather, as discussed in Chapter 5, participants relied on intuition, sensing, judging, emotion, and relationships of trust, and were enabled and constrained by relations of power. They relied on “making” sense, not “seeing” sense. Assuming otherwise can lead to being mystified by the events observed in schism. To advance understanding, there is value in lenses which consider complexity, emotion and irrationality, processes of social construction, and power, from the point of view of actors (Fairhurst et al., 2016).

Ultimately, LETS shows that the incidence, progression, and lived experience of schism are related to the meaning people ascribe to context and events, and how they experience and respond to them, more than to context and events themselves. This shift in perspective is an important one. In data, and in the literature, the variety of events and contexts seemed infinite, and unpredictably associated with onset of schism. Human needs and responses, however, were more finite and appeared to affect schism more directly. This shift made theorising about familiar patterns in schism feasible. As a result, it became conceivable to posit schism as subject to human agency and control.

Boundedness. Existing schism literature tends to assume boundedness of the social system of interest, whether that is an organisation, group, or society. Assuming boundedness leads to assuming schism occurs within a boundary, a closed system view. Balser (1997) pointed out conflicts can originate in the external environment, and advocated an open system view; but by maintaining the internal–external dualism, boundedness was still inferred.

Presupposing boundedness when researching an organisation, group, or social system draws attention to the fate of the entity as the primary concern. Narrowing attention to the entity de-emphasises both the role of systemic power and the influence and fate of human beings. Normative biases, like unity as a good thing and mass exit as a bad thing, are almost inevitably overlaid. An assumption of boundedness is integral to conceptualising schism as a cleavage of the whole, formal separation, or mass exit. It is natural to focus inside the organisation to find the alleged shortcomings which purportedly allowed or caused schism to occur. Boundedness creates a sense of conflict (and organisations) being spatially located, when perhaps conflict and organisations—like power—are not so corporeal. Beginning with an assumption of boundedness then, is problematic for building theory from data without any preconceived assumptions or judgments.

During this project, the assumption of a bounded entity was not initially challenged. Rather dissonance emerged from the data in multiple guises. First, it became obvious boundaries were permeable to many things including relationship networks; movement of individuals, money, and other resources; cultural and sociohistorical context; identification and identities; information, ideas, and change; and legal and regulatory requirements.

Second, it was difficult to identify where conflicts originated. Anne's conflict involved governance changes at her school, and could be classified as originating externally (regulatory and isomorphic), internally (principal–council relationships, leader expertise), or indeed inside herself (ideological) but for her it was all three.

The government was putting a lot of pressure on us to really define the roles of... governance, management, teaching.... Precisely—probably—to stop a lot of the... conflicts that happen.... It was very hard to get those roles defined and people to stick to them... I felt very undermined by that particular council.... [And it] was a real problem for me... in the sense that I had these old ideas... where the school had come from. (Anne)

Third, where the boundary was drawn was somewhat arbitrary, and affected perception of the schism and schism outcomes. In a case study in the literature, an environmental organisation splintered and both factions continued to perform roles in the broader Czech environmental movement, roles they perhaps could not have performed as successfully had they remained one organisation (Shriver & Messer, 2009). Whether a boundary was drawn around the organisation or around the Czech environmental movement would have a profound effect on how this schism and its outcomes are normatively perceived. The argument that where the boundary is drawn is both arbitrary and consequential can be applied more generally. In the schools cluster, loss of families through schism affected school boundaries. Sometimes people left the small independent school sector but other times they moved between schools of a similar type. *Back in the day (Adam)* they even started new schools which strengthened the sector as a whole.

The fourth issue with assuming boundedness, and particularly significant through a lived experience lens, was the question of group membership. Group membership was an important aspect of participant social identities, and the need for belonging was identified as a human need salient in schism. It was speculated early in the research that membership may be a way to define organisational boundaries for the purpose of classifying a “small” organisation for sampling. But organisational membership boundaries were surprisingly difficult to pin down. Data showed these boundaries to be ill-defined, indistinct, multiple, and changing with circumstance and over time.

In the small schools cluster, “members of the school community” anecdotally included staff members, students, and families. But “members entitled to vote at the AGM” was defined differently: children are not legally permitted to vote, and teachers were perceived to have a conflict of interest. In Neville’s service club, some people were active in governing and fundraising and some just attended on club nights for social reasons, and the two classes of members had differentiated status. In junior sporting clubs, “member” (playing) and “Member” (voting) had different meanings for identity and constitutional purposes. In some larger social service nonprofit organisations, people formerly called “members” were now called “clients.” In some organisations, members of the board

were the only constitutional members of the association (considering board members are voted onto the board by association members, this can readily be identified as a leadership tension).

Labelling who is a member of an organisation is an identity-defining and boundary-defining act, and including and excluding people as members profoundly redistributes power. The informal and formal meanings of membership appear to have changed over time, sometimes changing the very essence of the organisation.

LETS does not impose an arbitrary boundary on the social system of interest. This fits with a social constructivist paradigm, and with the data. This does not mean participants or members of organisations do not perceive boundaries, even if multiple or dynamic. They do. In writing this thesis, it was necessary to talk (not without cognitive dissonance) about organisations as entities, and about members of an organisation, since this is how reality is perceived. But it is not necessary to define the boundaries of the social system in LETS. Indeed, it is beneficial not to because it does not trigger the preconceptions discussed earlier including an internal–external dualism, the organisation as the entity of interest, and normative assumptions about unity and wholeness.

Normativity. Data showed schism was not simply perceived as good or bad, positive or negative. Judgment depended on perspective, when the evaluation was made, who made it, their personal lived experience, and what narrative had been constructed to make sense of it all. Shakespeare’s adage holds true: “For there is nothing either good or bad, but thinking makes it so” (Shakespeare, *Hamlet*, Scene 2, Act 2). Judgment depended on whether personal, collective, or organisational experiences and outcomes were considered. People assessed whether the schism was necessary, was managed as well as could be expected in the circumstances, or turned out for the best. As always in schism, these judgments were subjective and contested.

Much schism literature presupposes schism is not desirable. This may originate in a religious context; literature on religious schism featured the most negative view of schism of any of the disciplines sampled, and the Great Schism dates back to the 11th century. Schism is seen as “an actual fracturing in the body” and rapprochement is desired (Kreiner et al., 2015, p. 996). A negative

view of schism also aligns with normative framing of organisations as united, cooperative, and ordered (Deetz, 1996) and metaphors of machines with parts which must all work together or organisms which must function as one or die (Morgan, 1997). Some schism literature specifically notes positive purposes and outcomes of schism, particularly transformation (Gorup & Podjed, 2015). As with boundaries, binary assumptions oversimplify reality and create biases in research design and findings. Assuming schism is normatively negative tends to concentrate attention on averting schism incidence, thereby neglecting the possibility of improving agency and control during the progression of schism. Judging incidence of schism as negative leads to assigning blame to people perceived to have created (schism-makers) or failed to avert (leaders) schism. Framing schism as positive *overall* disregards the differentiated nature of outcomes and experiences.

LETS makes no judgment about schism, the incidence of schism, nor about people who may wish to facilitate or avert schism. Introducing fewer assumptions creates fewer distortions. That LETS imposes no judgment does not mean people do not experience schism as good or bad at various times or want to avoid it if possible. They typically do, and this is discussed in the next section.

LETS is an advance on existing schism theory. It provides a fresh perspective, is grounded in data, clearly defines each element, and integrates existing schism literature. It is a generalisable and robust theory which has potential to stimulate and support a productive research agenda. The following section explores the practical application of LETS in expanding agency and improving control in schism.

LETS in Practice

Regardless of the theoretical position in this thesis, that schism is inherently neither good nor bad, leaders interviewed expressed intent to avoid incidence of schism, and described multiple strategies they used to achieve this end. No participant in the study expressed desire for a schism experience or being happy one occurred, even when they believed it was necessary. *I didn't analyse whether it would end badly or not but I knew that there was... going to be a fight (Deborah)*. Not

even when the existing situation was untenable, or things *turned out for the best*, or they gained something valuable they did not expect.

I think the human mind is an amazing thing... [it] tends to forget bad experiences but it will always remember... TRAUMATIC experiences. But it compartmentalises it... whilst it [is happening] so it can COPE with it... I wish... the world was full of roses... I know [now] it's not. I came through it. With my livelihood, with an amazing committee... The personal loyalty to me... I am forever grateful and humble for.... I actually can view it as a fabulous life learning experience. (Cam)

Reasons to avoid schism were myriad: people did not like conflict; the experience was traumatic; people were forced to leave organisations, activities, and relationships they cared about; schism was disruptive and costly; and leaders and organisations suffered reputational damage. Yet, schism still occurred.

That schism has endured throughout history, despite the many reasons to stop doing it, leads to three observations. The first is philosophical: people place certain other principles and priorities ahead of avoiding conflict and schism. The second is about crystal balls: the people who suggested taking dogs on camping trips did not predict or intend schism. The third is pragmatic: reasons cited for avoiding *incidence* of schism are usually negative aspects of the *progression* and the *lived experience* of schism. Given avoiding incidence of schism may be difficult or impossible—or schism has already manifested—the possibility exists that people can still act to achieve better outcomes and have better experiences. To date, schism literature has few answers for people trying to manage in the situation where schism has already begun. People may wish to minimise organisational disruption, restore confidence in processes, or alleviate personal trauma for instance. Theoretical knowledge about schism dynamics is an important step in improving schism outcomes and experiences in practice.

Human agency and control can be expanded by applying the principles of LETS. Agency and control is made possible in the short term by better understanding the social dynamics prevailing

during schism; what options are available, to whom, and when; and what the likely response might be. In the long term, LETS sheds light on power and group leadership in nonprofit organisations. An argument is made here for generating more variety in the ways governance and leadership can legitimately be performed, in order to take advantage of valuable and scarce leader and leadership resources, especially in smaller nonprofit organisations.

In this thesis, *agency* is used to denote the perception that a person or group has a choice of actions, resources of power to enact them, and capacity to affect the system. *Control* implies a degree of predictability between action and system response. As discussed earlier, actions and reactions are multiple, micro-level, and often indirect, so there are limits to predicting what effect, if any, an action will have on a complex system. Nevertheless, LETS has the capacity to guide—with more reliability than existing models—strategies which are multiple (multipronged, coordinated); flexible (more choices); targeted (more leverage for fewer trade-offs); and controlled (improved predictability of effects).

Expanded agency and improved control have significant potential to affect schism outcomes and experiences, because they ameliorate two strongly emerging aspects of the lived experience of schism: the powerlessness of crisis and the disorientation of liminal space. The following sections discuss agency and control in turn, then particular conditions likely to exist in small organisations. The difficult situation of when the “good guys” lose is then broached.

Expand Agency: Multiple Levers for Intervention

The principle of complexity, foundational to LETS, means both direct and indirect actions can be expected to induce a response in the system, and LETS suggests multiple intervention points. The seven elements and associated sub-elements are obvious targets for intervention. Separate consideration of incidence, progression, and lived experience of schism allows for different types of action depending on the state of the system and the goal of the intervention. LETS also recognises the pivotal role of human needs in constructing meaning and determining human and system

responses. Sensemaking and sensegiving can influence meaning making and meet human needs even if, pragmatically, circumstances cannot be changed. If human needs can be met, no matter if in relation to the issue being contested, this can improve people's well-being and their capacity to be creative, compassionate, and cooperative.

Agency via Schism Elements. Many strategies for schism management suggested by addressing each element are well known in management and leadership literature. Team building is insurance against factionalisation and builds network strength. Well-structured change management mitigates against a sense of crisis, liminality, and identity threat. Transparent and fair processes ease worldview impingement and the sense of being in a liminal space. What LETS offers is collecting strategies together, highlighting interactions, and showing that building resilience to schism and managing schism are not separate activities to everyday leadership.

As a new principal, Belinda negotiated schism primarily by performing leadership as well as she possibly could. It took time, and a personal emotional toll, but she achieved a resolution to the schism—and transformational growth of the organisation—without the conflict affecting the whole school.

It's a bit like a chess game really.... Always with a REALLY clear goal.... The absolute BEST, for the children.... You do everything you can to protect the children. So they have no idea. They never had any idea. (Belinda)

Many examples in the study showed where agency applied to even one of the elements had an effect on schism. *Coups* at AGMS were aimed at shifting power but escalated contest, *slanging matches* at meetings inflamed and escalated schism because it was personal, and *secret meetings* and *us and them* language fuelled factionalisation and strained the network. Transformational change introduced with little regard for organisational culture and history, or human needs, generated worldview impingement and schism.

They recruited me. I restructured the organisation... Looked at the business side of things. And I was HEAVILY criticised for doing it... I got an external consultant to... do a needs analysis. Not because I needed to, but... you're never a prophet in your own village.... Monday morning, they're all sitting down with their biscuits and cup of tea.... She held up the matrix and said, "This is what you're doing that's really valued, by the people that you're serving. This is what you're doing which has got no value whatsoever.... And this is what they think of you. As a team.".... And the smiles went... People said... "But that's what we DO." I said, "Well, not anymore." (Philip)

Philip took responsibility and made no apologies for the way he went about change management in his organisation.

When I did that, half the staff left. They said, "This isn't the organisation I want to work for any more." A lot of the vitriol was directed at ME, because they couldn't direct it at the organisation, because they LOVED the organisation. (Philip)

From his point of view, he replaced the half of the staff and board who did not support a new way of working—quickly and relatively painlessly.

Change management meant that we could bring in people, and REALLY focus on delivering outcomes, and we were TOTALLY justified in doing it, cause we just went back to the needs analysis. (Philip)

The perspective of the people who left the organisation can only be speculated on, as Philip was the only person interviewed about this schism, but powerlessness and loss of identity seem likely features of the lived experience and outcome. It is possible some of them would have stayed in the organisation if Philip had chosen a different approach. Alternately, the schism may have been more protracted and even more painful. In some participant stories, where people continued to hope the outcome would eventually fall in their favour, resolution was a long time coming and there

was no guarantee of the outcome. The tendency to keep fighting as long as the issue is in doubt has been explicitly noted in schism literature by Hobbs (2011).

Regardless of the how and why of interventions, each of the seven schism elements is a powerful lever when targeted directly.

Agency via Separating Incidence, Progression, and Lived Experience. Looking separately at schism incidence, progression, and lived experience through the lens of LETS is helpful for expanding agency, since strategies used for averting incidence of schism, which tend to dominate, are not as useful once schism has started. Schismatic conditions need to be taken into account. Targeting what it is about schism people want to control, at the right time, is likely to be more effective than a narrow focus on reducing incidence or on containment.

Interventions will be more impactful and controllable if the state of the system and targeted dimension of the schism are considered. If the social system is already in schism, an attempt to write a new constitution, for example, however much needed to enable a fair process to occur, will be subject to contest and suspicion of motives if not outright manipulation.

Ignoring our request for a special general meeting to get rid of the management committee, they had one instead to adopt the new model rules¹.... They counted votes and they'd lost. And immediately there was an uproar... "Oh, we've got to do a recount, we've got to do a recount".... And of course, on the recount, they won.... Which was great from their point of view, because the new constitution allowed five proxy votes per person, whereas the old constitution stood at two. (Ken)

¹ When the Western Australian Government introduced new legislation (*Associations Incorporation Act 2015*) to mandate a corporate style of governance for nonprofit organisations, they provided a set of model rules (<https://www.commerce.wa.gov.au/publications/model-rules-associations-2016>) for organisations to adopt or modify, to replace their existing constitution, so they would comply with the legislation. It was not mandatory to adopt the model rules; they were offered to aid organisations, especially in transitioning their constitutions within the required timeframe. Having said that, if an organisation did not adopt the model rules, they were required to itemise and justify variations. (The formal language change from "constitution" to "rules" was not adopted by research participants.)

Updating a constitution to strengthen group leadership capacity was more productively done when the group was not in schism, given the group had the resources. After a schism, amending a constitution was sometimes a task of recovery, to *stop it happening again*. Overcorrection and overfocus on avoiding the exact same problem, rather than considering the coherent whole, were noted. Two participants explicitly rationalised why no changes were made to the constitution, following schisms where the constitution had been weaponised, by arguing *common sense* would stop people misinterpreting a constitution to suit themselves. While their faith in human nature was heartening, people had just done that very thing. As noted in the section on underdeveloped versus informal structure, people behave contrary to expectations very often in schism.

An example of strategic intervention in the progression dimension aimed at de-escalating aspects of a fully engaged schism, was described by Jane, the environmental activist in the study. Jane wanted to increase the perception of worldview impingement experienced by members of the public, and persuade them to support or join the environmentalists in contesting road construction requiring habitat destruction. At the same time, she wanted to make sure protestors did not inadvertently increase the size and legitimacy of their opposition faction by alienating contractors, members of the police force, or members of the general public. She was focused on ensuring animus was directed only at government policy. The strategy of limiting the size and scope of the opposing faction was a way to not escalate the schism unnecessarily, improve their relative power position, and to meet some human needs. Protestors were already distressed and angry, and limiting hostile affect towards other human beings *just doing their job* benefitted everyone's well-being.

The quality of the lived experience of schism is a third—often neglected—dimension to consider in the control of schism. It may be infelicitous to suggest but there is no universal law that says the continuance of an organisation is more important than the collective lived experiences of the members. In fact, the stated purpose of an organisation often *is* the collective lived experiences of the members. The tendency to prioritise the organisation is not just the province of leaders and researchers. Participants demonstrated a deep-rooted bias towards actions and motives which

promoted *the good of the club*. This compulsion seemed stronger and more instinctive than an imposed value, and perhaps insight into this observation may be found in social identity theory and how much people value belonging. When thinking about how to manage schism, the first thought may be outcomes for the organisation, but concern for the well-being of members of the group can have a doubly positive effect. Concern for people can reduce individuals' stress, distress, and loss, preserve relationships, decrease the number of people who exit the group, and improve the chance of future cooperation. But consideration for human experiences may improve outcomes merely because people under less stress can make better decisions (Holsti, 1979).

Evidence in the data suggests taking care of people during schism is difficult and patchy. People did wholeheartedly support members of their own faction, and efforts were made by leaders to protect organisation members. Ingroup–outgroup dynamics, however, promoted negative affect towards members of the opposing faction. Examples from the data have been shared of people having a miserable time, of hating or fearing other people, and of people putting principles or personal slights before people's well-being. This is complicated by other people's behaviour being less than exemplary. An example was the long-term leader of Tim's club who was perceived as reacting poorly when her leadership was challenged. In a natural response to her response, she was consequently criticised and marginalised, rather than forgiven for having experienced a natural reaction to identity threat and perhaps even honoured for her contribution.

A complicated relationship was observed between what was best for individuals and what was best for the organisation. It was often rationalised that getting rid of certain people was best, not just for the organisation, but for everyone else (e.g., Elizabeth's executive staff schism). The opposite was seen with Cam's situation at Sporting Club 1, where protecting him was seen as good for the organisation also. On a smaller scale in the same schism, Finn felt protected from attack at committee meetings, and this also benefitted the club by encouraging leaders of the future. Members of the opposing faction, except the Coopers, were given the benefit of the doubt and reintegrated into the club, if not back onto the committee, serving the dual purpose of repairing

their relationship with the club and retaining members. Scapegoating served a purpose in schism, to allow for negative affect and blame to be concentrated on fewer people, such as the Coopers, minimising loss of membership, and preserving other relationships. Scapegoating was very painful, however, for the scapegoat. Retrospective narratives and sensemaking were often used to justify the sacrifice, by casting them as the schism-maker who *brought it on themselves*.

To sum up, separating the schism dimensions of incidence, progression, and lived experience has multiple benefits. More precisely targeted interventions can help negotiate schism with better outcomes for people, relationships, and organisations. There is a tendency in the existing literature to conflate schism with schism incidence, without comparing the quality of the lived experience or whether the best outcomes in the circumstances were achieved. In a more nuanced treatment, the positive potential of schism need not be quashed because of the risk of negative outcomes: the group may risk incidence if they feel more confident of managing progression (e.g., during change management). If it is accepted that schism is sometimes inevitable or worth risking in pursuit of an end, this could help stimulate research into schism management. Furthermore, the problem identified here of schism stigma may become approachable.

Agency via Sensemaking and Sensegiving. Whether people perceived schism as a divisive threat or shared problem to be solved was a function of how they made sense of the situation. There were examples in the data of a leader able to steady and reunite a factionalised group in full schism using a *discourse* to focus on a few critical priorities. Brian was one who utilised sensegiving to meet human needs of his school community, among other things to feel confident their child's schooling would be the experience they imagined when they enrolled.

It had become painfully politically painful.... Amongst all of this was the finances of the school.... During that period of grief, the school population went from budget, which was just over 70 [students]... to 49.... If you look at the books, it would simply be, this school is not sustainable, end of story.... Given that we still had the vision, the discourse that had to be applied was about the financial well-being of the school,

and the school's longevity.... But at the core and the heart, was what we thought about young people and their schooling and learning at a community school. (Brian)

These were exceptional leaders, discourse was not their only strategy for de-escalation of schism, and they did not succeed quickly or without *hard work* and *grief*. In the data, it was also likely to find shared sensemaking and sensegiving occurring within factions, which typically widened the schism. Whatever way they are used, sensemaking and sensegiving affect the way people feel and interpret information, and are therefore an intervention tool in schism.

Agency via Meeting Human Needs in any Context. One of the features of schism is that people feel overwhelmed and constantly vigilant, like they are in a crisis or liminal space. People in crisis have less capacity for decision making (Holsti, 1979). Surprise triggers the slower discursive consciousness (as compared to the faster practical consciousness) taking its limited capacity away from functions such as rational and empathetic thinking (Kahneman, 2011, p. 75). People are stressed and distressed. Schism accentuates human needs for certainty, predictability, justice, security, affirmation, belonging, and power. Even if it feels like there is absolutely nothing that can be done about the issue, interventions can be targeted directly at the well-being of people.

Ask the people... what they would actually need. "Right now, things are quite destabilised, what would be useful to you right now, for you to do your job?"... WANTING to hear that answer, and then, "Well... this is what I CAN do, but I can't do THAT right now—bear with me."... Engaging, and having that authentic communication, and trust... being clear. (Ryan)

It can be inferred that meeting human needs in any context will aid people's capacity in all contexts.

To sum up, agency in schism may be expanded by direct interventions targeted at the seven elements and the sub-elements; by considering the different dimensions of incidence, progression, and lived experience; through sensemaking and sensegiving to alter how a situation is perceived and interpreted; by meeting human needs in any context; and by using any combination of these.

Improve Control: Allow for Prevailing Conditions

A social system in schism has distinctive dynamics. These dynamics make a difference to what conflict resolution and leadership strategies are available and effective. In liminal space, existing cause-and-effect relationships appear to break down, creating the sense of unpredictability discussed in the section on human needs. A revised and realistic assessment of the prevailing conditions in schism is likely to enable strategies to be more precisely targeted and generate a more predictable system response. Control can be improved, it is posited, with a more accurate understanding of the existing human and social dynamics in schism, which LETS provides.

Each story had its particularities, but three conditions were common to all the schisms in this research: people were feeling cognitive, psychological, and physiological stress; almost everything was contested; and group leadership capacity was diminished. Furthermore, especially in the smaller and volunteer-led organisations, diverse needs and limited resources created further tensions, especially when it came to group leadership capacity.

Human Needs and Stress. The lived experience of schism was stressful for people. *I told him I had just been in hospital, and I wasn't going to put my health at risk anymore. I think, by the end, he was shocked that it had reached that point (Isaac).* People being stressed meant they were simply not at their best for resolving difficult conflicts. And their attention was, subliminally at least, on meeting human needs for identity security, predictability, certainty, justice, and empowerment.

People in schism have diminished capacity in the very areas that are needed to resolve problems with the best possible outcomes: positive mutual regard, perspective taking, creativity, well-being, empathy, and cognition. When sensemaking in schism and choosing intervention strategies, it makes sense to consider the needs of people and their mental, emotional, and physical resources in the context. Understanding this can help to predict and explain what might otherwise appear as surprising or unreasonable responses.

Contest. In schisms in this study, definitional and performative elements of schism interacted to escalate contest, conflict resolution orientation was win–lose, and opposing faction members were regarded with strong negative affect.

This is going to sound heartless... If they were run out of this town because no one would employ them? Good! As far as I'm concerned. And I've got no qualms about saying that. I actually HATE her. (Cam)

Other people leaving the group became a viable (often only) desired outcome. Language was framed as *us and them*, *winners and losers*, and *fight to the death*. The conflict was intense, and it tended to spread from the issue ostensibly at question to everything else.

People did persist in trying to resolve the conflict, even under difficult circumstances (as noted by Briody, 2016). Faction boundaries were sometimes spanned by individuals in an informal capacity, but rarely in public. Processes were often followed, but this did not always de-escalate conflict or end in an outcome perceived as fair. The transition from cooperation to contest happened unevenly. One example of this was surprise coups at AGMS; the faction initiating the coup were competing while other members were still in a cooperation mindset (as noted by Dyck & Starke, 1999) or at least acting “as if.” *We had allowed two people to... take on the two most important club positions... president and secretary.... We needed to do something about that (Eli).*

Awareness of a changing orientation from cooperation to contest was often sensed, but it could be problematic for people to act upon that awareness.

Some fairly horrendous rumours were spread about me... and I just needed to be really careful about being professional and not retaliating.... [Staff members] felt like they were forced onto one side of the fence or the other. (Elizabeth)

Not being able to legitimately acknowledge a changed conflict resolution orientation was a hindrance to using effective strategies. Whether making sense of a surprising response, or choosing

an action, the element of contest is an important aspect of prevailing conditions to consider. Actions taken using faulty (or rose-coloured glasses) assumptions are unlikely to have the intended effect.

Group Leadership Capacity Diminished. Group leadership breakdowns were identifiable in every schism in the study. Organisations in schism are likely to have significant people, network, and structural tensions. In practical terms, this means a group cannot reliably fall back on the trope of the strong or expert leader to guide them through the crisis, even if they usually employ this style of group leadership. Neither can they rely on a strong sense of community or shared purpose and trusting relationships. Structural leadership capacity can also be compromised.

The most catastrophic leadership breakdowns seen in the people sub-element were a leader being undermined, and a leader out of their depth (when there was no leader, people tended to step in, in a form of network adaption). Contributing to that were breakdowns in the network, especially trust, communication, and mutual support and regard. Common breakdowns of structure included weaponisation of out-of-date constitutions and overreliance on informal governing, especially when both occurred together. Overlaying all of that was another common problem in schism: *You do get crappy people who do crappy things to other people (Ryan).*

We used to have a leadership group meeting... every couple of weeks.... [She] would gather together the other executive, go through the agenda, and they'd work out what to undermine and sabotage... [pained laugh] I only found this out afterwards.
(Elizabeth)

Different views were expressed about whether it was better to contain conflict or *get grievances out*. Differences seemed to correlate with how the group structured and enacted leadership. Many of the CEOs and principals expressed concern for organisational reputation, continued operations, and professional conduct, and typically favoured containment. Containment tended to place a lot of responsibility with one or a few people and often isolated the formal leader from support. Other members and the organisation seemed to benefit in the long term, with the caveat members felt disempowered in a few stories. Big turnouts at general meetings were more

common in volunteer-led organisations. These may be described as turning into *slanging matches*, but it did seem to imply members felt engaged, cared about the fate of the organisation, and felt a sense of shared responsibility. *There was a bit of a club community meeting where they were talking about what might happen, given the breakdown of the committee (Eli).*

There is no one right way. But the assumption must be that in schism, when it is most needed, group leadership capacity will be diminished. An expert leader who has organisation-wide legitimacy, a supportive network, and access to robust formal governance is a luxury. An observation in the data of a trend to more concentrated and centralised power and responsibility is concerning. Overreliance on fewer individuals and a strong emphasis on formal governance structure, combined with diminished network connectivity, flexibility, and redundancy, may limit the options group members have in schism and put excessive stress on individuals.

Conditions in Small and Volunteer-Led Nonprofit Organisations. Participants from smaller groups tended to report fewer leadership resources: increasing difficulty recruiting volunteers especially to hold formal leader roles; less formal governance and less time and expertise for updating it; lack of experience in managing serious conflict; and surprise at normative breaches. A common phrase heard was *we're just volunteers*. Groups could not realistically expect members of their governing body to be experts in leadership or conflict resolution. Limited group leadership capacity added to the difficulty of responding to schism.

Inherent contextual factors contributed to schism in small groups. Sporting clubs and other activity-based clubs, for example, focused valuable time and energy on their shared activity, sometimes at the expense of maintaining group leadership capacity. Support groups were not a collection of like-minded people. *We're not talking about a professional board... What brings them together is their children have a syndrome. So they are completely different people, coming from completely different backgrounds, completely different life (Penelope).* Schism was hard to resolve when people approached the situation with different values and rationalities.

In a small group, one person can make a large difference by gathering just one or two supporters. When a situation like that coincides with other leadership tensions, schism can be quite easily triggered.

Amazing group, absolutely amazing group. And the president of this group gets terminally ill. Hands on the baton.... And this person takes on the baton in good spirit, which is admirable.... [But] this wasn't a good idea, because this person CLEARLY KNEW that she did not have the ability to lead. But she decided that she was going to do it.... And then in pops the conflict person. (Penelope)

When complications arise, it may help to have realistic expectations of what groups have the capacity to cope with, as opposed to blaming or stigmatising groups retrospectively for not having had their *ducks in a row*. Understanding schismatic conditions existing in the social system helps target schism interventions and predict possible outcomes. Of course, the specific circumstances of the group are also crucially important, including history, relationship dynamics, and individual people. It is not a coincidence most participants felt the need to first set the scene and introduce the characters when relating their schism story.

Performing Leadership in Small Nonprofit Organisations. The observation that small organisations often have limited group leadership capacity leads into a discussion of different ways they might respond, and what effect this might have on resilience or vulnerability to leadership breakdowns and schism. Groups in the study performed leadership differently, focusing on different aspects of group leadership capacity, either as a philosophical choice or to take advantage of the leadership resources they had available. Valued or opportunistic features of group leadership could be maintained, even if they introduced tensions, when there was redundancy and flexibility in group leadership capacity, at least while people and circumstances remained in place.

Recall Eli's reminiscence from Chapter 5, of his earlier time on the Sporting Club 1 committee where *stuff's done by word of mouth.... and you generate... enthusiasm*. This committee ran the club for several years relying primarily on a strong leadership network. In other groups,

particularly the schools, well-respected leaders greatly strengthened group leadership capacity in the people category, even though one person being so pivotal to everything could unbalance the leadership network over time.

I mean, the governing body sort of knows what's going on. Most parents are very happy 'cause their child's happy and that's great. I love that... The hard work's never showy, but it's important, so you work hard for what you believe in. (Brian)

Arguably, it makes no sense to suggest such organisations forgo the opportunity to benefit from leader and leadership strengths they have available, especially not to comply with external expectations. Not even if—as findings here suggest—they are likely to induce tensions in group leadership capacity by unbalancing people, network, and structure, and may have to face leadership breakdowns induced by those tensions sooner or later. Well, why not later? The situation will be different by then.

It can help to look at instances of schism using a longer historical lens. Brian's school did stumble with the principal role when he left, with a short-term, unsuccessful appointment, but they were still in a far stronger position than when he started. The same was true for Sporting Club 1. Furthermore, when the schism at Sporting Club 1 occurred a few years later, three young men who had been coached by Cam, including Eli's son and Finn—*It was just bad, especially like when it's happening in YOUR club where you've grown up (Finn)*—stepped forward to serve on the committee.

For Dino and me, and for Cam particularly... those boys were... a big part of, you know, we were PROUD of them. They joined the club as... primary school kids, and they're still there, as uni kids.... Playing... volunteering for junior club... Daniel and Tammy didn't get that... They didn't understand the community part of it. (Eli)

The situation had changed: new leaders arose through network continuity. A new leadership tension was created: the youth and inexperience of three committee members. This tension was mitigated by network redundancy in the form of a large committee. Flexibility and adaptability are key.

When the “Good Guys” Lose

Losses that are compounded by outrage are much less acceptable than losses that are caused by misfortune or by legitimate actions of others. (Kahneman & Tversky, 2004, p. 743)

Despite the expectation people held, that *justice will prevail*, some experiences did not fit the narrative. The maxim *two sides to every story* most certainly applies in schism, since both factions typically consider themselves the good and right faction. That other people may also be hurt, however, did not make the pain less for the people who told their stories. This section is a small interjection, a heartfelt honouring of participants haunted by a deep sense of wrongness as a result of their schism experience.

This research has highlighted the role of the schism-maker, and infers that if this can be legitimately discussed, it may improve the effectiveness of conflict resolution. This is not easy. Some people seemed to have an unusually destructive effect on group harmony. A number of people commented how shocked they were that someone in the nonprofit sector could behave so unethically. *I remember... someone saying to me, “Not-for-profit doesn't necessarily mean nice” and I'm like, “What? What do you mean?” (Linda)*. Several people explicitly used the word psychopath or sociopath.

I had not seen these early warning signs that this girl was in fact a sociopath. But a very skilled and convincing and smart sociopath... she actually aligned the three senior leaders in the organisation with HER. (Meredith)

Participants often described a person gathering a group of supporters around them as *charismatic, influential, persuasive*, the kind of person who is hard to counter when they are quietly gathering supporters, and even more dangerous once they have. Even when their growing influence is acknowledged, there is not always something that can be done to defend against them. Several leaders expressed how difficult it was to be undermined, *white-anted*, or openly attacked by

members of their organisation. Isaac, Elizabeth's partner, reflected on how her board schism affected her personally.

It undermined her confidence, she wondered what she was doing wrong... She KNEW that the main protagonist... was a nasty piece of work. But, it was very difficult to know how to handle it... Sometimes you CAN'T do anything about it... They are what they are. (Isaac)

Linda's story was of personal betrayal. To set the scene, the founder of the organisation Linda volunteered in left suddenly because of events in her personal life. The organisation *scrambled* for around six months with temporary leaders, until Linda *stepped up, like it was the natural progression*. She believed she was having success and growing the organisation, but her story did not have a happy ending.

She had been my mentor, she had been my friend.... She had said to me... "I trust you, here you go, this is your baby." I guess in essence, all I wanted was, I wanted to do justice to her organisation. The board put me into the CEO role....

*All of a sudden, she started... putting her foot back in the door.... The new board... were saying to her, "We need... a clear boundary around what your role is."... And then, something happened... She made a decision... on something that we had all disagreed with, as a board. And that's when it went completely to s**t, like you would not believe.... The board... called her on that.... But because she had always made the decisions—*

So, anyway, she sent an email.... to the board, saying, "I can see we've got a lot of conflict going on, I'm going to step aside."... But, behind the scenes, she was having conversations.... then the next thing you know [emotional], I got an email, two of us got an email, threatening, that if we didn't resign immediately—

So, when that happened, five of us resigned off the board. I never ever spoke to her again... I was SO hurt... The worst thing.... Some of these people were my FRIENDS. I had this letter—signed—saying... “Get out, you've ruined the organisation.” (Linda)

LETS suggests there is always some action that can make a difference in the system, no matter how small. As participants in this study found though, persisting can come at a cost. Something LETS can offer people is affirmation of their experience, and enough perspective to know when to leave. *Sometimes it's just self-preservation (Anne)*. In the crisis-like, liminal space of schism, disengagement may seem unthinkable. Disengaging from the contest, however, is not the same as admitting fault or conceding one's position. It is simply the realisation that continued engagement, and even winning, comes at a cost, and exit is an option that might hurt less in the long run.

Hettie, Ken, Ingrid, and nine other people were forced out of their volunteering roles in a country community organisation. Unlike other participants who could choose to leave when the cost of staying became too great, they were formally excluded against their wishes. As has been intimated, they believed they did nothing to deserve expulsion, and this was eventually acknowledged by a later committee. The chair of the new committee hand delivered Hettie an invitation to re-join the organisation.

As a matter of fact my son was here.... So, after all that has happened, he said, “Well, Mum, I don't know what your problem is, they're offering you to go back, isn't that what you wanted?” (Hettie)

But the damage was done. Hettie still felt hurt and indignant. *I didn't really feel like doing a training course, after two decades!* Plans they made without her input stung. *He said, “we'll help you with your eye problem.”* But she had always had help in the past, from friends who had all been *gotten rid of*. It was not the same place, not to Hettie. Other people described similar points of no return, of there being no chance of reidentifying with the organisation, no matter what happened.

Hettie had enjoyed local notoriety and respect due to the expert and entertaining way she carried out her public-facing role. Hettie was in her eighties, and blind, and over the three years the group fought their expulsion, she lost her self-confidence, her role and weekly activities, her connection to the broader community and, very sadly, her husband died. She suddenly felt very *old*, and *worthless*. It was hard hearing the grief in Hettie's voice. The arbitrary and unfair ways losses were incurred added to the sense of injustice.

What I miss most is it kept me in touch with what was going on. It kept me in touch with younger people. If I'm at home and just joining old people's clubs, I'll be OLD. I AM old. I know I am old, but you know what I mean. (Hettie)

Hettie contributed a bag full of newspaper articles, meeting minutes, and letters (which of course she could not see well enough to read) from supporters, her husband, the committee, and other members of the group. There were so many, it took hours just to sort them into date order and piece together a timeline of events over three years. Read aloud in her interview, so she could provide commentary, they prompted her sharp memories of powerlessness, anger, and loss.

Hettie's group were not naïve or incompetent people, they were leading members of their community—and feisty. They just faced a committee of people described by a member of the expelled group as *megalomaniacs* who were willing to weaponise governance.

They just made it almost impossible... I think people probably think well, if we had the knowledge, we could have done something else. But we really don't know what. (Hettie)

Perhaps it could be said they limited their strategy to a formal process stacked against them, and responded to outrageous letters with their own letters, eventually a solicitor, the local newspaper, and the State Administrative Tribunal (SAT). Nothing worked. *They told SAT, "We don't care what you say, even if you say they can go to the AGM, we will be dismissing them."... Where do we go from here, Kath? (Ken).*

Ken was one of several participants who brought up the idea of an independent body with the power to overturn an organisation's official vote or dissolve their management committee. *But if the club themselves have elected a new president... the members have spoken.... Who are we to come in and override that? (Glen)*. An ideological commitment to the principle of self-governance precludes supporting the idea of a superordinate body with that kind of power as a possible answer. Added to the values reservation, it would be just one more level of "power-over," and there is no reason it could not also be used as a weapon, or create even more isomorphic pressure in the sector.

The relevant question in this context is whether LETS could have helped Hettie and her group. Perhaps by helping them realise the existing conditions were not conducive to a process-based response, and offering alternate interventions than escalation of technicalities. Those alternatives would likely have escalated the power struggle and probably would have involved breaking some rules of one sort or another, or at least acting out of character.

As many of the groups found, there is no governance process that can ensure that a very determined and difficult person or group can be stopped, especially if they are willing to weaponise that governance. *You think you have made a decision that would stop it, or fix it, and it hasn't... I don't know how... maybe it will never, ever be fixed (Anne)*. People do abuse formal power, as has been illustrated with quotes from Hettie, Ken, and Ingrid that talked about mysteriously appearing proxies, membership rorts, suspicious vote counting, and locked meeting doors—not to mention being called *noxious weeds*.

It is power, not justice, that ultimately decides the outcome of schism. But by foregrounding people and relationships, and human experiences, LETS is a reminder that both power and justice are ultimately subject to human agency. It is people who decide whether or not to use resources of power ethically, and people who must hold each other to account.

Summary of Lived Experience Theory of Schism

LETS is a novel theory of schism, emergent from qualitative, lived experience data, and integrated with a priori knowledge. Underlying assumptions are minimal, considered, and transparent; each element emerged from research data and has been carefully defined; and any significant deviations from literature have been justified and supported by data. LETS is a holistic response to the original overarching and emerging research questions articulated in Chapter 3.

LETS comprises seven elements which interact in complex fashion and describe and explain dynamics observed in schism in a social system. The four definitional elements are worldview impingement, transformation, factionalisation, and contest, which are the necessary and sufficient elements to define an episode of schism. The three performative elements are human needs, balance of power, and group leadership capacity. Action taken to meet unmet or threatened human needs was found to drive schism dynamics, and the most significant of these actions was contesting for power relative to the opposition faction. Group leadership capacity was found to be both the strongest predictor of schism, in the case of leadership breakdown, but also the most effective tool for reducing incidence and improving outcomes and lived experience of schism.

LETS advances theoretical understanding of schism and, in combination with the new definition, offers explanations for a number of previously unresolved questions in the literature. LETS fills the need for an actionable theory. It offers the opportunity to translate new knowledge into practice, in particular by expanding agency and improving control in episodes of schism. LETS may be applied by a variety of actors at a local and system level. LETS is offered here as a rigorously developed theory and a conceptual framework for future schism research, in the hope it will stimulate theoretical interest in the enduring and widespread phenomenon of schism.

Chapter 7 Conclusion

Existing theoretical knowledge of schism is sparse and contradictory and of schism management all but nonexistent. The proposed new definition and theory emerging from this research are grounded in stories of the lived experience of schism, related by people who worked and volunteered in the nonprofit sector in Western Australia. Integrated in the current work are schism concepts from organisation studies (Balsler, 1997; Dyck & Starke, 1999), anthropology (Bateson, 1935; Turner, 1980), and social psychology (Hart & Van Vugt, 2006; Sani, 2008). The novel ontological perspective of schism developed here has enabled contradictions and disjunctions in literature to be resolved. This research is an advance in theoretical understanding of schism, particularly in the context of nonprofit organisations. Chapter 7 restates the main findings of the research, and highlights contributions to knowledge in the spheres of theory, practice, and policy. Generalisability of LETS, limitations of the research, and avenues for future research are discussed.

Research Project Overview

An exploration of schism in nonprofit organisations in Western Australia was undertaken, using a qualitative, lived-experience research design. A rich data set was obtained by interviewing 41 people from 24 organisations with varying purposes, resource constraints, and governance styles.

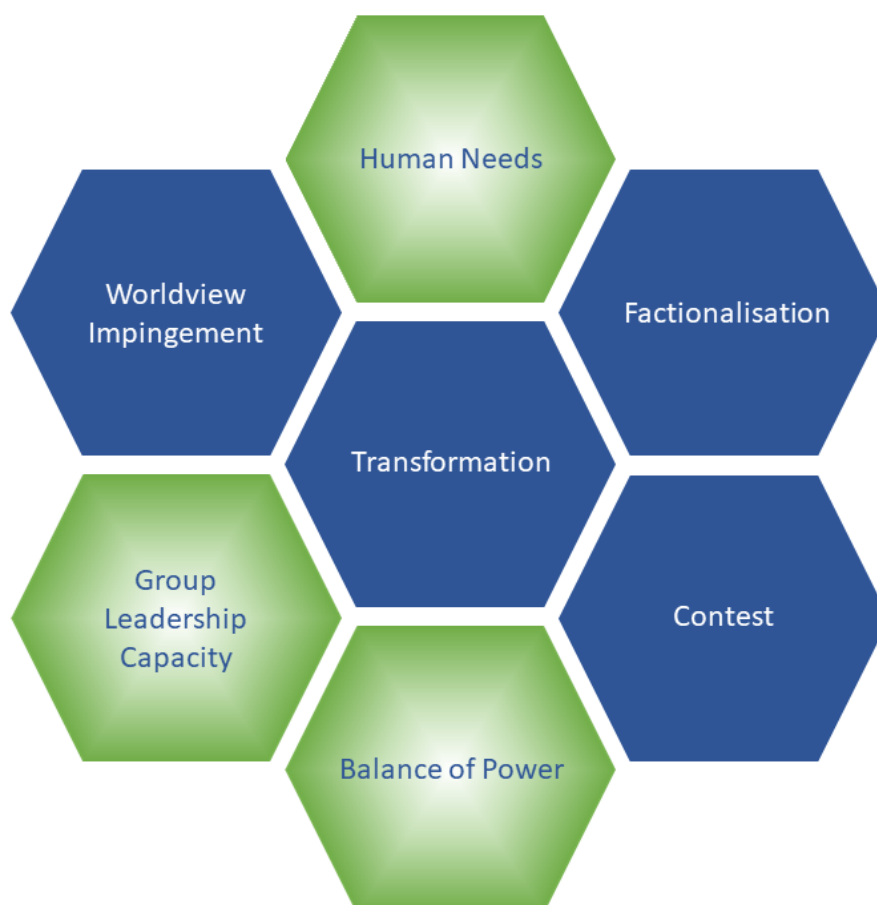
A new definition of schism is proposed. Schism is defined as a complex social process identified by the concurrence of four interacting elements: worldview impingement, transformation, factionalisation, and contest. This robust, empirically grounded, and generalisable definition of schism fills a gap in schism literature and resolves inconsistencies between existing conceptualisations.

Building on the definition, a lived experience theory of schism—given the name LETS—is proposed (see Figure 7, reproduced below). Familiar events and social dynamics characteristic of schism are conceptualised in LETS as driven by the way people perceive, make sense of, and respond to their lived experience. Schism dynamics are depicted as complex, multiple, cause-and-effect

interactions occurring between people and with their environment. Care has been taken to define each element of the theory, and to explicitly state foundational principles and assumptions underpinning LETS.

LETS highlights the role of human needs, contesting for power, and group leadership capacity in understanding schism. In particular, schism dynamics appear driven by people acting to meet human needs perceived to be threatened or unmet, and contesting for the power to control the progression and outcomes of the schism. Schism dynamics appear most subject to human agency via the capacity of the group to enact leadership. Original concepts including group leadership capacity and leadership network have been introduced, to capture the shared and emerging qualities of group leadership observed in nonprofit organisations during schism.

Figure 7 Lived Experience Theory of Schism (LETS) (Reproduced from Chapter 6)



LETS utilises the proposed new definition of schism as a foundation and is grounded in lived experience data. As described in detail in Chapter 6, LETS reconciles existing disparities in literature, offers greater depth and precision, and provides a conceptual framework for a fruitful research agenda. LETS fulfils the research goal of empowering nonprofit practitioners—through a better theoretical understanding of conditions and social dynamics in schism—to have expanded agency and improved control in schism. LETS has potential, therefore, to improve human lived experiences of schism and outcomes at individual, collective, organisational, and sector levels.

Research Questions are Embedded in Findings

Collection of data in discovery-style interviews was based on the overarching research question “How do people understand and express their experience of schism?” The proposed new definition, developed from analysis of this data, answered the emerging research question “What is a schism?” The remaining three emerging research questions scaffolded thematic analysis and development of theory throughout the project. “What contexts, social dynamics, and characteristics (elements) do schisms have in common?” and “How do people feel, behave, make sense, and respond in schism?” structured the development of the four definitional elements and the three performative elements, respectively. The question “What insights from this research can help people recognise and have agency in schism?” sharpened focus on developing a theory which was usable and useful.

Contributions to Knowledge

This section summarises the contributions of this research to schism theory, practice, and policy, which have been elaborated in Chapters 4, 5, and 6.

Contributions to Schism Theory

Lived Experience Research Design. Most existing schism research has focused on the society, group, or organisation as the unit of analysis, which naturally imposes a particular theoretical,

practical, and normative perspective. The novel use of a lived experience lens for schism theory development privileged human experience, human agency, relationships, and social dynamics. Use of a lived experience lens enabled fresh insight into schism dynamics and the chance to examine and let go of restrictive assumptions about linearity, single-factor direct causation, mass exit as definitional of schism, boundedness, and normativity. A novel conceptualisation of what schism is and how it develops was made possible by using a research design framing social systems and schism as inherently human and relational.

Proposed New Definition of Schism. The new definition offered is an advance on, and ontologically distinct from, existing definitions of schism. The dominant linear process, mass-exit conceptualisation of schism is eschewed in favour of a complex process where the start and end is defined by the concurrence of four definitional elements: worldview impingement, transformation, factionalisation, and contest. The literature focus on identifying contextual factors and events which appear to be associated with schism incidence is de-emphasised, and attention is instead focused on how the lived experience of context and events affects people, and how they make sense and respond. Schism is thereby acknowledged as a human construction, and clearer and more predictable patterns emerge.

The new definition resolves discrepancies between models in literature from anthropology, organisation studies, and social psychology. Inconsistent findings including the cause or trigger of schism and the temporal manifestation of schism elements, are obviated by using the proposed definition. The definition also offers an explanation for the previously vexed question of why schism develops sometimes and not others in similar circumstances.

The proposed definition integrates existing schism knowledge with themes emerging from data into a coherent whole. Using the new definition, episodes of schism can be identified as they are occurring, with no need to wait for a process-ending event such as a mass exit. The definition can distinguish an active episode of schism from the historical context, build up, and recovery

phases. The proposed new definition situates schism as a unique social phenomenon in the context of other processes of group development, conflict resolution, and change.

Lived Experience Theory of Schism (LETS). LETS has been developed in the context of nonprofit organisations but is put forward here for consideration as a theory of schism in any social system; human experience seems universal. LETS makes no assumptions about the boundedness of the social system or the normativity of schism. The stripping of unnecessary conditions helps extend use of the theory from the research context, which has a focus on leadership and management of nonprofit organisations, into different social systems with different types of boundary conditions (e.g., societies) and into contexts of purposeful disruption (e.g., activism).

LETS uses the emerging new definition as a solid theoretical foundation and adds three performative elements: human needs, balance of power, and group leadership capacity. This research shows the active role human needs and sensemaking have in driving schism dynamics. A contest to shift the balance of power was found to be a rational and natural response to the lived experience of schism and a primary driver of escalation. New concepts—group leadership capacity, leadership tensions and breakdowns, and leadership network—have been introduced to aid in articulating the performative role of group leadership in schism.

Schism literature to date has focused primarily on two things: associations between apparent cause and schism incidence, and description of schism progression. LETS identifies three dimensions of schism: incidence, progression, and lived experience. This provides scope to expand research on managing schism from a relatively narrow focus on reducing incidence. Use of the three domains highlights possible interventions which can help groups achieve better outcomes and experiences even once schism has become fully engaged. As elaborated in Chapter 6, LETS is descriptive, explanatory, and also actionable.

An explicit treatment of power and group leadership is a strength of LETS, and distinguishes it from theoretical models of schism in the literature. A helpful connection is thus made, between

the under-theorised and neglected schism literature and the well-established power and leadership literatures, which can structure and inform future schism research.

Contributions to Practice and Policy

LETS is a practical, observable, and actionable theory available to a range of actors. The focus in this section is on contributions to practice and policy for leaders, managers, members, and volunteers of nonprofit organisations, but LETS could readily be applied by activists and other change agents, and in an organisational or civil setting.

We are in Schism. What Now? There is a gap, in theory and practice, when it comes to advice about how to lead a group in the midst of schism. Decision making based on consultation, fiat, or voting has limited scope for problem solving that meets everyone's needs and secures people's commitment to those decisions. Grievance procedures tend to focus on individual conflict, not group conflict. A constitution is a tool for contested decision making (especially elections), and clarifying responsibilities (who has the power to do what). But no matter whether they are weak or strong, governance processes alone are not a panacea for schism (Harris, 2015).

Many groups in the study found themselves in schism without a well-used, robust constitution or their governance was weaponised in the contest for power. The liberal use of war metaphors in schism illustrates why everyday conflict resolution practices do not work well in schism. Assumptions about community, cooperation, and issue-based conflict do not hold—it is war, and it is personal. Having a more realistic understanding of the conditions existing in schism may enable groups to use more effective conflict resolution practices.

LETS provides a range of options to expand agency and improve control in schism. In a complex system, multiple, small, direct and indirect actions by various actors can affect the progression and experience of schism. Agency is expanded by identifying multiple leverage points for intervention including each of the seven elements and people's interpretation and lived experience of context and events. Interventions can also be targeted at meeting human needs in any context, to

alleviate the stress induced by the lived experience of schism. Being aware of and managing the tendency to judge schism as normatively negative can also expand options. The group may consider early exclusion or marginalisation of a schism-maker as a viable choice, for example. Early recognition that the primary goal may not be keeping the group together also has potential to reduce negative outcomes and experiences. This is more easily recognised in retrospect, of course, since the perceived necessity of splitting develops iteratively along with entrenched factionalisation, negative affect, damaged relationships, righteousness, threat perception, and investment in the contest.

Control can be increased through better understanding of the dynamics between schism elements, and by making realistic assumptions about the social dynamics prevailing in the social system during schism. In schism, group leadership capacity is diminished, contest is more likely than cooperation, and people are stressed and not at their best for creating solutions or considering others' well-being. Through a better theoretical understanding of existing conditions, it is possible to predict system response more accurately and thereby select multiple, concrete, effective interventions. Both agency and control can be targeted to the different dimensions of schism—incidence, progression, and lived experience—as situations and priorities change over time.

In Stable Periods. The close relationship between group leadership capacity and schism means any efforts to strengthen group leadership capacity will also mitigate against schism. Strengthening the group to be more resilient to schism is not a separate, extra activity for leaders. Periods of relative stability are an opportunity to make conscious choices about group leadership and distribution of power, based on alignment with the group's identity and culture, as well as pragmatic considerations of current leadership resources. LETS can be used to systematically, element by element, map out a strategy for building group leadership capacity, taking advantage of strengths, monitoring tensions, and bolstering capacity where needed. Attention to the concept of the leadership network can augment leadership capacity, especially where leader expertise and experience is scarce. The leadership network accentuates awareness and legitimacy of aspects of

group leadership which are traditional strengths of the nonprofit sector: trustful relationships, communication, commitment to shared values and goals, and goodwill. This may make a network-focused leadership style a good fit, especially for community nonprofit organisations with limited resources.

LETS provides guidance for systematically monitoring the development of conditions conducive to schism, such that schism could be easily triggered by an unexpected event. Being surprised by schism and detecting schism by instinct was commonly reported by participants. Checking regularly on the status of the four definitional elements can act as a tangible early warning system. Whether factions are differentiating from each other or the organisation, for example:

I think our schools can get, I'll call it "the cult of the teacher." So, you get really highly regarded and respected teachers... you can get a divided loyalty between the school and the teacher or class, and that's something to watch as a principal. (Adam)

Awareness of the four definitional elements may be useful when considering change management, where transformation is induced deliberately and unavoidably. If worldview impingement, factionalisation, and contest are monitored and deliberately minimised, the change project may have a greater chance of avoiding resistance or organisational schism. It is also worth considering the three performative elements as part of ongoing management. Group leadership capacity building is discussed in the previous paragraph. Regular consideration of how well human needs are being met will improve well-being and is likely to reduce risk of schism. Neville's story in Chapter 6 illustrates the importance of regularly checking whether power is both theoretically, and in practice, distributed in a way that matches organisational philosophy.

At Sector Level. A number of issues were identified throughout the research which can be addressed at sector level. This research converges with others in pointing out the loss of diversity, wasted potential, and dual-structure conflict which is the result of isomorphism and institutionalisation of governance structure in the nonprofit sector. Findings support an expansion of legitimate organisational structures, to suit the variety of needs and resources within the sector.

This research alludes to mechanisms of long-term performative change affecting sector identity, and shifts in the distribution of power away from members, out of organisations, and out of the sector altogether. A corollary, important from a lived experience perspective, is the observation that stress and isolation expressed by leaders seemed to be directly related to this shift of power and responsibility. This has individual, organisational, and sector ramifications for the well-being and retention of leaders.

The novel perspective of LETS enables the development and legitimation of a wider choice of governance structures and conflict resolution processes, to suit the richly diverse philosophies, resources, and functions of organisations in the nonprofit sector. New theoretical knowledge of schism has the potential to improve choice and effectiveness of schism interventions, and reduce overreliance on avoidance strategies. Avoidance is one valid strategy, but it is not helpful once schism is fully developed, and can induce stigma for organisations and leaders who do experience schism.

Regardless of whether incidence of schism can objectively be blamed on poor group leader performance or inadequate group processes, group members still need knowledge and effective strategies to manage the situation as it stands. If failure and stigma associated with schism incidence could be ameliorated, schism could be treated as a situation like crisis: a low-probability, high-impact phenomenon that inevitably happens in groups. Reframing schism in this way may legitimise more research into schism management, equivalent to research into crisis management (e.g., Gilstrap et al., 2015; Holsti, 1979; Mumford et al., 2007; Pearson & Clair, 1998; Weick, 1988). Better-informed management practice can improve schism outcomes and experiences. Improved schism management can only be beneficial for developing skill and experience in resolving serious and vexed conflicts in any context.

Generalisability and Limitations of Research

Managing the size and complexity of this research was a challenge throughout the project. Finding the right boundaries—balancing depth and attention to detail with scope and connectivity—was a continual process. A strategic decision was made, in keeping with an interpretivist research paradigm, to ensure that findings were solidly based on evidence emerging from participant data. This commitment did not mean secondary data was ignored; cases in literature and global and local affairs were routinely considered when testing theoretical concepts for soundness and generalisability. What this commitment did mean is that findings reported here are entirely supported by primary research data, obtained using a scientifically designed method as part of a focused research project. This rigour presented a conundrum, however, when it came to discussing generalisability and applications of the emerging theory. The proposed new definition and LETS are based on data from the research sample, and evidence for their generalisability to schism in other contexts has not been presented in this thesis. This was a deliberate choice, to bound the project. The potential for generalisability has been considered, however, and deliberately built into the design of the theory.

Similarly, the boundaries of the thesis were kept close when it came to connectivity. Connections with other literatures and possible practical applications—conflict resolution, change management, nonprofit organisations becoming businesslike, and well-being at work, for example—have deliberately been kept tentative. Political parties, civil discourse, and democracy kept recurring as real-world examples, but were excluded from discussion in the thesis. There is potential, however, to explore such connections. It has been claimed here that research into schism as a phenomenon would benefit from a dedicated literature, and that tangible connections with other literatures are also vital to advancing schism research.

A quote from Clegg et al. (2006) has stuck since being captivated by *Chapter 6 The Heart of Darkness*, illustrating how everyday organisational power is the basis of total institutional control.

The study of extremes is important for organization science. Extremes serve to demonstrate that irruptions to normalcy and taken-for-granted assumptions are not some deviation from normal but regular, albeit unpredictable, occurrences.... The point of looking at extreme cases is to see normal phenomena in a condensed and concentrated form, especially as these normal phenomena center on the person in the institution. (p. 143)

Schism is an extreme state of a social system. Connections to well-established literatures can, as argued, benefit schism research but equally, the study of schism can benefit other literatures.

The above are arguments for potential—the potential for generalising and applying the research findings reported here. The research project itself—the lived experience of schism in nonprofit organisations in Western Australia—has inherent limits to generalisability. The sampling scope, localised context, and voluntary nature of participation in the study, are the main limitations to be acknowledged.

Sampling Context. A consistent socioeconomic, cultural, and regulatory environment, and a focus on incorporated nonprofit organisations in one state of Australia, were useful for controlling variation but affected generalisability in these dimensions. Further research could explore if the emerging theory can be applied in other countries and in the business and government sectors. In particular, it would be interesting to explore the anecdotal observation that individual exit may be more favoured than schism in hierarchical organisations, where formal authority and structure are highly legitimatised and dominant forms of power compared to employee resistance and dissent. LETS in political and sociological settings is an appealing application, especially in the current climate where attention is being paid to partisanship and nationalism, and ideological political schisms appear to be deepening and widening.

LETS is an advance on existing schism models, in terms of generalisability, as they have typically used single or few cases, or cases chosen for their similarity. Primary data collection in this research encompassed a range of nonprofit organisations in Western Australia, using theoretical

sampling to enhance generalisability (Eisenhardt & Ott, 2018). A range of secondary data was also available. Schism literature provided cases from around the world, in social movement, political, and religious settings, among others. Schism in current global affairs was often noted (e.g., Brexit). This combination of well-documented and emerging schisms supplemented the primary data, providing opportunities to test abductive leaps made in theory development. Valuable contrasts were found when considering social systems where exit costs were extremely high (e.g., nation states, political parties) and in social movement contexts where the primary objective was transformation rather than maintenance of group unity (which was the dominant objective of many participants in the primary data sample). A generalisable theory was the enduring aim of the research, so the prospect of imposing contextual conditions to improve fit or simplify the theory was not countenanced. The thinking was not “it works when,” the question continually asked was “but what about if?”

Participants. The concentration of participants in formal leader roles gave a certain flavour to responses, namely maintaining unity, order, and an enjoyable culture to work in as normative aims. The second most studied cluster were activists, disrupters, and resisters. The role of boundary spanners and translators in liminal space was touched on. LETS has been developed with the aim of being used by any actor in a social system. Research designed to capture experiences of actors in a wider variety of roles and contexts could test the generalisability of LETS in this dimension.

More subtly, participation was limited to people willing to tell their story. Only one participant expressed any regret at their involvement in schism, which leads to the conjecture that—whether they won or not—only people who, in retrospect, believed they were on the right side and did the right thing offered to be interviewed. It is statistically unlikely that 41 people could all be members of the good faction, fighting the good fight against power-hungry, ill-intentioned, unethical opposition. This implies more is being constructed in schism and schism recovery than the resolution of a conflict. Future research could explore ethics and judgment; retrospective sensemaking and the power of narrative; and the construction of a cloak of legitimacy to justify schism and as a defence against personal stigma, shame, and cognitive dissonance.

Complexity and Richness of Data. The role of the researcher is an inherent limitation of qualitative research. The rich, thick data collected in interviews generated many avenues to explore. This surfeit of choice accentuated the role of the researcher in filtering, selecting, and analysing data, and in constructing and communicating knowledge. On the other hand, the richness of the data, the research design, and the philosophical framework matched the complexity and social nature of the phenomenon being studied, and suited the underdeveloped state of current theory. Without the breadth and depth of perspectives, the emerging theory would have been diminished.

Future Research

The proposed new definition and LETS provide a conceptual framework for future research. The theoretical concepts are well defined, supported by data, and internally coherent. Importantly, the ontological reframing of schism and schism dynamics has provided a fresh perspective from which to begin to ask more productive questions. The current research project has highlighted numerous avenues for research into schism, and a selection of these are outlined below.

Test LETS Elements and Their Relationships. Many questions emerged during theory development, where further research would have added depth of understanding to the concepts embedded in the theory. Examples include factionalisation as its own process of social construction; changing levels of trust and mutual concern; and the independence or not of worldview impingement and transformation, and their relationship to threat perception. Each of the seven schism elements is a topic deserving of in-depth research in future.

The relationships between the elements, conceptualised here as complex, may have more specific correlations which would help practitioners. In change management, for example, which is tantamount to inducing transformation, might it be possible to control factionalisation, worldview impingement, and contest to minimise resistance to change? Some specific human needs during schism were identified in this research, but this project was not a systematic analysis of human needs, and such research would be better served with a dedicated research design. Furthermore,

emphasis was on the human needs perceived as threatened or unmet during the active schism episode. It is likely a different set of human needs would be highlighted prior to a schism episode (e.g., need for change) which would be helpful in understanding schism incidence.

Power. A number of concepts have been developed and claims made in this thesis, not least about power in schism. These claims need to be tested, or at least argued about. The observation that conflict avoidance and stigma may be related to power shifts out of the nonprofit sector and a subversion of sector identity is a research topic with important implications for nonprofit organising.

Many emerging questions about power have not been articulated in this thesis; a line had to be drawn somewhere. Does power always decide the outcome of a schism contest? Does this only apply when the climax of the schism is a showdown between factions, or does coercive action through formal authority amount to the same thing? In this research schism was typically resolved by an escalation of the contest for power until a climax occurred, but schism could be resolved through de-escalation and a return to cooperative problem solving. A mutually satisfactory resolution, in place of power-based coercion, is a highly desirable outcome for organisations if for no other reason than restoring future working relationships, trust, and commitment. Systematically exploring ways to tip schism dynamics in favour of de-escalation and restoration of trust and goodwill would be valuable research.

Future research could map dimensions of power onto schism, and investigate whether schismatic conflicts are sometimes, usually, or always directed at structural power, and the implication this has for conflict resolution (Haugaard, 2020). Interestingly, for all that schism is associated with a goal of transforming structural power, the observed *exercise* of power in this data was often episodic and direct (e.g., formal authority, coercion, bullying, weaponisation) compared to the everyday exercise of power which is commonly systemic and indirect (e.g., routine, socialisation, natural order of things, institutionalisation, subjectification, reification).

Group Leadership Capacity. The newly introduced concepts of group leadership capacity and leadership network bear further scrutiny. Several applications of this schism element have been

discussed in the Contributions to Practice and Policy section. Briefly, mapping leadership and management research onto the concept of group leadership capacity could test its practical utility for developing organisational resilience to schism, and improving group leadership in small volunteer-led organisations with limited resources. More, LETS could help legitimise variety in leadership and governance structures, reduce dual structure issues, and provide better ideological and practical fit between organisations and their governance.

The metaphor of a leadership network was introduced to try to capture the symbiosis between people that enables organisation to occur. Aspects of emergent group leadership which are not people and not structure but are imbued in relationships between people—whether articulated as a network or not—appear vitally important to group leadership capacity. They are also natural strengths of the nonprofit sector. Claims made here about a waning of the status and salience of the leadership network compared to people and structure warrant critical discussion.

Action Research. The acid test of LETS is whether it can help organisations in schism. Action research is needed to test whether the theory is more than descriptive and explanatory but also actionable: whether it can be readily understood and effectively applied in practice. To do this, ethics approval would need to be secured for an action research project design; the findings of the current project would support this application. Other practical applications of LETS in organisations, which could apply action research, are conflict mediation including the role of boundary spanners, change management, and building group leadership capacity in organisations with limited resources.

Sensemaking in Schism. Embodied sensemaking emerged as a strong theme of this research. Further research investigating small, iterative, day-to-day decisions made by individuals and groups could shed more light on organisational and societal processes in schism. Holistic forms of sensemaking were observed, and this overlaps with new research in the field of sensemaking, as discussed in the Literature Review. Discourse analysis could interrogate the use of embodiment and war metaphors.

The appropriateness or otherwise of displaying and considering people's emotional and psychological state during conflict resolution and decision-making practices, was a topic which evinced strong feelings and beliefs in participants, without any sort of consensus. By privileging human needs and the lived experience, LETS can scaffold research into this enduring dilemma. An intersection with new research into emotional and narrative embodied sensemaking (see Chapter 2) could be explored.

Lived Experience Lens. Many avenues exist, leading directly from this research, for applying a lived experience lens to schism. It was clear from different stories, which ranged in historical distance from the present, that changes occurred in people's accounts over time. To access people's emotions, instincts, physicality, and sensemaking in schism, and to gain a better sense of liminal space and crisis, data needs to be gathered of people's real-time lived experience, as opposed to a *retelling* of their lived experience. Future research would aim to secure ethics approval to explore current schisms, and employ more phenomenological and ethnographic data collection, perhaps participant diaries and emails or first-hand observation of meetings. Longitudinal studies could provide different insights, compared to hour-long interviews. Even though people told a story that occurred over time, the entire story was related from the perspective that person held during that single hour. Healing from and learning from schism, both individual and organisational, would also make fascinating topics for study.

Finally, a dilemma faced during this project was how to represent the lived experience of participants respectfully and authentically, to convey the full, raw power of the lived experience. The need for deidentification, and the abstraction to theory made trade-offs necessary. Participant use of narratives in retellings, moreover, was a strong emerging theme. Future research using a narrative methodology could explore the role of narrative in navigating schism, as well as fulfil the very early aim of the research, which was to explore the intense, deeply personal, lived experience of schism.

Final Reflection

The seed of this project may have sprouted when given the student assignment *Your Worst Leadership Experience*. The paltry 300-word limit hardly did the episode justice. But daring to reflect on that demoralising time may have opened a door to helping other practitioners doing the best they can to navigate the minefield that is schism.

The goal of this research was always to use new knowledge of schism in practical ways, to provide practitioners with a range of options and perspectives for approaching conflict and schism, to improve organisational outcomes, but especially to reduce harm to people and their relationships. Nonprofit and civic organising are invaluable to society. When sharing power, when organising in groups, when solving complex and difficult problems, when trying to transform society, when people care about and identify with organisations or a mission, conflict is a given. Schism is inherent in social systems, it is difficult to control, and avoidance is not a viable universal strategy (De Dreu, 2008). Not only does it not always work, avoiding conflict precludes developing strengths in resolving difficult conflicts and in schism management, and imposes normative judgments with long-term performative effects.

Schism is conceptualised here as theoretically neither good nor bad in itself. But the reason nobody wants to have a schism is because outcomes are so often objectively bad on multiple levels, and the lived experience of schism is usually awful. Schism may have a good purpose in society—that of transformation—this does not make some particular schisms positive. This makes schism *the price we have to pay* to choose how power and justice are distributed and how we enact society (Turner, 1980). Unless we are content to live in a hegemonic state of homogeneity and passivity, we cannot stop having schisms, but we can get better at them. We can reduce collateral damage, and we can do this through better understanding the social dynamics of schism. And that is what this research is about.

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Table of Glossary and Appendices

Glossary	295
Appendix A Human Research Ethics and Participant Recruitment	297
<i>Figure A1 Human Research Ethics Committee Approval</i>	297
<i>Figure A2 Human Research Ethics Committee Approval (Variation)</i>	298
<i>Figure A3 Participant Information Letter</i>	299
<i>Figure A4 Participant Informed Consent Form</i>	302
<i>Figure A5 Participant Recruitment Presentation Sample Slides (Peak Body In-Person Meeting)</i>	303
<i>Figure A6 Participant Recruitment Advertisement (Peak Body Newsletter)</i>	304
Appendix B Participant Pseudonyms and Organisations	305
Appendix C Coding Schema	307
<i>Figure C1 Final Coding Schema</i>	307
<i>Figure C2 Extract from Code Frequency Spreadsheet</i>	308
<i>Figure C3 Extract from Narrative Coding</i>	309
Appendix D Interim Model of Schism	310
<i>Figure D1 Interim Model of Schism</i>	311
<i>Figure D2 Schism Themes Emerging Using Lens of Interim Model</i>	313

Glossary

Acronym	Term
AGM	Annual General Meeting
CAQDAS	Computer-assisted qualitative data analysis software
CEO	Chief Executive Officer
COO	Chief Operations Officer
DES	Department of Education Services
LETS	Lived Experience Theory of Schism
MBA	Master of Business Administration
SAT	State Administrative Tribunal

Term	Meaning in Thesis
Agency	The perception that a person or group has a choice of actions, resources of power to enact them, and capacity to affect the system.
Aspects of leadership	Any person, role, task, activity, responsibility, or structure associated with performing leadership.
Balance of power	Balance of power is a performative element of LETS. It is a representation of the power of each faction relative to one another. The balance of power is a dynamic, context-specific social construction.
Contest	Contest is a definitional element of schism. Contest describes a schismatic form of conflict between factions, characterised by negative affect, active engagement, and a win–lose mindset.
Control	Degree of predictability between action and system response.
Critical leadership breakdown	Combination of concurrent, cascading, or pivotal leadership breakdowns which can be identified as contributing to the incidence, escalation, or inflammation of schism.
Definitional elements	The set of four elements—worldview impingement, transformation, factionalisation, and contest—which are necessary and sufficient to define schism, identify cases of schism, and distinguish schism from other social processes.
Factionalisation	Factionalisation is a definitional element of schism. Factionalisation is the adoption of conflicting worldviews by people, who identify as a social group, and have agency as a collective.

Term	Meaning in Thesis
Group leadership capacity	Group leadership capacity is a performative element of LETS. Group leadership capacity is the capacity of the group to harness available leadership resources, and collectively enact leadership to meet the needs of the group.
Human needs	Human needs is a performative element of LETS. This element represents an open set of human needs, which people experience as threatened or unmet in schism. People seek to meet these needs both purposefully and instinctively.
Incidence, progression, and lived experience of schism	Incidence, progression, and lived experience of schism are three dimensions of schism of interest in this research. Incidence refers to whether schism occurs, and the likelihood schism will occur. Progression assumes schism does occur, and describes what happens: escalation and de-escalation, events, multiple outcomes, and the ongoing development of schism elements. Lived experience describes the quality or “sense” of the experience for people, including the degree of trust and reciprocity in relationships, the degree of inflammation and distress, and losses incurred by people.
Leadership breakdown	Leadership breakdown describes a situation where an aspect of leadership is not working for the group, at a particular time, and is contributing to the incidence, escalation, or inflammation of schism.
Leadership network	The leadership network is a complex, synergistic network of people and relationships contributing to group leadership capacity, by enabling cooperative work to be done and by facilitating the social construction of the organisation.
Leadership resources	An aspect of leadership the group has access to in the current context.
Leadership tension	A current working arrangement of aspects of leadership that has the potential to contribute to schism in future, given a change of circumstances.
Leadership void	Collective term to describe a category of leadership breakdowns observed in the data, including absence of leaders; loss of a valued leader; a period of short-term, temporary, or unsuitable leaders; not enough volunteers for a committee; or leaders not conferred legitimacy by the group.
Performative elements	The set of three elements in LETS—human needs, balance of power, and group leadership capacity—which were observed to have a performative effect on the social dynamics in schism.
Schism	Schism is defined as a complex social process identified by the concurrence of four interacting elements: worldview impingement, transformation, factionalisation, and contest.
Transformation	Transformation is a definitional element of schism. Transformation refers to actual or potential transformation, which participants may experience as opportunity or threat, disjuncture with the past, or an uncertain present or future.
Worldview impingement	Worldview impingement is a definitional element of schism. Worldview impingement refers to conflict or tension between worldviews including a degree of perceived impingement or mutual exclusivity

Appendix A Human Research Ethics and Participant Recruitment

Figure A1 Human Research Ethics Committee Approval



Figure A2 Human Research Ethics Committee Approval (Variation)



Figure A3 Participant Information Letter



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Information Letter (Individual)

The human experience of schism in small nonprofit organisations

Investigator (s) Ms Kath Sugars (PhD candidate)
Principal Supervisor Dr Megan Paull

Contact Person Kath Sugars
Address School of Business and Governance, Murdoch University, South St, Murdoch
Telephone No. 0414 302 451
Email kathsugars@gmail.com (preferred contact)

You are invited to participate in this study.

Background

Research has shown that conflict and schism are a common phenomenon in nonprofit organisations. Studies have been done in religious congregations and political and social movements which have identified some factors associated with conflict, such as organisational identity, decentralisation of power and decision-making, and external political change. However, little research has been done in more task-oriented nonprofit organisations. In addition, most research has focused on factors and outcomes relevant to the organisation or the nonprofit sector. We are interested to learn more about conflict and schism from the point of view of individual human beings.

We are inviting your organisation and you, personally, to participate in this research over the next few weeks. You may also be invited to consider participating in a follow up interview at a later date.

Aim of the Study

We aim to better understand the human experience of conflict and schism, ultimately to help volunteers and paid employees of nonprofit organisations.

What Does Your Participation Involve?

1. A one hour interview, at your convenience. A follow up interview may be requested, which you are free to agree to or decline.
2. You will be asked to sign a consent form giving permission for the interview to be recorded.
3. Questions will be open-ended and designed to allow you to tell your own story, and share your own thoughts and feelings about what happened and why, and how it has impacted you and your organisation. The researcher's role is to hear your story, and not to debate the issues or take sides.
4. All the interviews will be de-identified, that is once the interview has been transcribed it will be stored under a code-name, and all quotes in published work will be representative of what people said and not identifiable as belonging to a particular person. De-identification is a process commonly used in research to protect individuals and organisations from readers deducing particular identities from quotes or other data. While every effort will be made, it may still be possible that some readers could attempt to deduce certain identities. It may be known, for example, who has been interviewed.
5. Should you wish to read the transcribed interview and comment on it you can email the researcher at kathsugars@gmail.com, who will arrange this with you.



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Voluntary Participation and Withdrawal from the Study

It is important that you understand that your involvement in this study is voluntary. While we would be pleased to have you participate, we respect your right to decline. There will be no consequences to you if you decide not to participate. If you decide to discontinue participation at any time, you may do so without providing an explanation. If you withdraw, all recordings and transcripts of your interviews will be destroyed, although once data has been aggregated and analysed there comes a point where it is not possible to identify and withdraw your particular contribution.

Your privacy

Your privacy is very important to us. Your participation in this study and any information will be treated in a confidential manner. Your name and identifying details will not be used in any publication arising out of the research. Following the study the data will be kept in a de-identified format, in a password protected form. This data may be used by the researcher in published research subsequent to the current PhD research project.

Possible Benefits

It is possible that by participating in the study you may gain a better understanding of what happened leading up to and during the conflict and schism and what you, personally, or your organisation may choose to do in future. It may also be cathartic to talk to an objective outsider about your personal experience, or help you in your own reflection. It may help to reflect on your thought processes, reactions or emotions in periods of stress, and those you observed in others.

If we are able to take the findings of this small study and link them with a wider study, the result may be valuable information for others and it may lead to a better understanding of conflict and schism from the human point of view. A more nuanced understanding may bring to light ways for people to influence the conflict process, to put protective measures in place, to detect early warning signs, to know what help they need, and to feel free to ask for help without feeling conflict or schism represents a personal or community failure, or a failure of nonprofits ideals.

Possible Risks

The main risk in participating in this study is reliving painful emotional experiences. A second risk is repercussions from sharing sensitive information but this risk will be minimised through careful protection of confidentiality of individuals and the organisation. A third risk is 'stirring up' unresolved issues. This could have different outcomes, including reigniting conflict and/or resolving old issues. If you find that you are becoming distressed or have any concerns you will be advised to talk with your GP, counsellor, a family member or friend or community elder.

Questions

If you would like to discuss any aspect of this study please feel free to contact either Kath Sugars (researcher) on ph 0414 302 451 or kathsugars@gmail.com or Megan Paull (principal supervisor) ph 9360 6040 or m.paull@murdoch.edu.au. Either of us would be happy to discuss any aspect of the research with you.



The results of the study

Once we have analysed the information from this research project a summary of our findings will be emailed to you. Because the study will involve interviews with multiple individuals and several case studies, the information will be an aggregate of all the findings. Therefore, you can expect to receive this feedback at the conclusion of the project (2019).

This study has been approved by the Murdoch University Human Research Ethics Committee (Approval 2016/229). If you have any reservation or complaint about the ethical conduct of this research, and wish to talk with an independent person, you may contact Murdoch University's Research Ethics Office (Tel. 08 9360 6677 or e-mail ethics@murdoch.edu.au). Any issues you raise will be treated in confidence and investigated fully, and you will be informed of the outcome.

Figure A4 Participant Informed Consent Form



Consent Form (Individual)
Interview

www.murdoch.edu.au

The human experience of schism in small nonprofit organisations in Western Australia

I have read the participant information sheet, which explains the nature of the research and the possible risks. The information has been explained to me and all my questions have been satisfactorily answered. I have been given a copy of the information sheet to keep.

I am happy to be interviewed and for the interview to be audio recorded as part of this research. I understand that I do not have to answer particular questions if I do not want to and that I can withdraw at any time without needing to give a reason and without consequences to myself. I agree not to name any third-party organisations or individuals specifically, when reflecting on my interactions with them.

I understand I may be provided with an electronic copy of the transcript of my interview, at my request via email to the researcher (kathsugars@gmail.com), and I may supply feedback.

I agree that research data from the results of the study may be published, as part of current or future projects, provided my name or any identifying data is not used.

I understand that all information provided by me is treated as confidential and will not be released by the researcher to a third party unless required to do so by law. I have also been informed that I may not receive any direct benefits from participating in this study.

I declare I am 18 years of age or older.

Participant's name: _____

Signature of Participant: _____ Date:/...../.....

I confirm that I have provided the Information Letter concerning this study to the above participant; I have explained the study and have answered all questions asked of me.

Signature of researcher: _____ Date:/...../.....

Please return this form to Kath Sugars (researcher) at kathsugars@gmail.com, or in person.

CRICOS Provider Code: 00125J
ABN 61 616 369 313

Figure A5 Participant Recruitment Presentation Sample Slides (Peak Body In-Person Meeting)

1

Schism process: subgroups, conflict, exit











2

This research project



Alternative view of organisations:

1. Conflict inherent in organisations
2. Complexity leads to paradox, leads to conflicting logics, creates tension
3. Conflict and schism uniquely human (irrationality, emotion)

Human perspective, in context of complex open system

GLOSSARY AND APPENDICES

Figure A6 Participant Recruitment Advertisement (Peak Body Newsletter)

Article Title:	Tell me about your experience of group conflict
Date of submission:	22/5/17
Date to remove:	After one inclusion (or two if possible please)
Short Blurb Text: This should not be any longer than 3-5 lines. This is used to grab readers attention	Have you ever been involved in a nonprofit group during a period of conflict which resulted in members leaving? Was it emotional? Stressful? Did it leave a lasting impression? If so, you are not alone. I am collecting conflict stories for my PhD, and I would love to hear your personal experience, or the story of your group. Would you be willing to help me?
Full text: If you need any part of this to link to an attachment please put link/or document name in brackets. Please do not hyperlink text as it just adds extra steps that will prolong this process	<p>Hi, my name is Kath Sugars and I am a PhD student at Murdoch University. Over the years, I have been involved in a number of nonprofit organisations, including schools, sporting clubs and charities, as an employee, volunteer and committee member. Two things I know for sure. One, there are a lot of caring and dedicated people in WA, working to help others. Two, arguing about how to do this is an inevitable and creative process.</p>  <p>From time to time these arguments don't readily resolve, and can result in opposing factions, hostility, and even the loss of multiple members. This happens despite organisations establishing strong structures, good leadership and positive cultures.</p> <p>I am especially curious about how these 'schisms' affect human beings, as well as teams and organisations. Therefore, I am beginning my project by listening to people who have had such an experience, and are willing to share their recollections and reflections with me. I hope to glean insights into how to respond to situations beyond the rational, the predictable and the controllable.</p> <p>If you would be willing to share your story with me, as an individual or as a group, I would be honoured. Please be assured I would treat your confidences with the utmost respect, and no person or group will be identified in any publication.</p> <p>Interviews are scheduled for one hour, at your convenience, and any further commitment is by mutual agreement. Please feel welcome to call and ask questions, or discuss how you may be involved. My principal supervisor at Murdoch University is Megan Paull, m.paull@murdoch.edu.au or 9360 6040. My ethics application has been approved (2016/229).</p> <p>I can be contacted by phone 0414 302 451 or email kathsugars@gmail.com.</p>
Additional Notes	I have attached a jpg of my photo, in case you have to delete it from the text for formatting in the newsletter. I have included it to hopefully show I look friendly, nonthreatening and old enough to have some experience in the topic I am researching!

Appendix B Participant Pseudonyms and Organisations

Pseudonym	Role During Schism	Organisation	Purpose of Organisation
Small Schools Cluster			
Anne	Teacher, Coordinator	School 1	Small independent primary
Adam	Teacher, Coordinator, Principal	School 2	Small independent primary
Brian	Teacher, Principal	School 3	Small independent primary
Belinda	Principal	School 4	Small independent primary
Carmen	Advisory	Peak Body 1	Independent education sector
Sporting Club 1 Cluster			
Cam	Contracted coach	Sporting Club 1	Small, family and junior player focused sporting club; contracted exclusively with Cam as club coach (industry standard)
Dino	Parent of playing member, committee member, contested presidency		
Eli	Parent of playing member, committee member		
Deborah	Mother of Cam, long-time playing member		
Finn	Young committee member, coached by Cam as junior		
Glen	Coach at another club		
Social Service Organisation 1 Cluster (Elizabeth's Story)			
Elizabeth	CEO	Social Service 1	Small disability services organisation but grown significantly under Elizabeth's leadership
Harry	Human Resources Manager		
Felicity	Executive Assistant and boundary spanner		
Gabrielle	Board Consultant and Executive Coach		
Isaac	Elizabeth's partner (also CEO of SS7)		
John	External mentor for Elizabeth		
Volunteer Organisation 1 Cluster (Hettie's Story)			
Hettie	Volunteer, local celebrity due to role in organisation	Volunteer Organisation 1	Small, country town organisation valued by local community
Ken	Volunteer		
Ingrid	Volunteer		
Leisure 1 Both Sides Represented (The Dog Policy)			
Logan	President, for dog policy	Leisure 1	Camping trips, social, some fundraising for charity
Matt	Member, against dog policy		
External Support			
Olivia	Facilitator	Consultant 1	Self-employed as conflict negotiator
Penelope	CEO	Peak Body 2	Peak body for support groups, support and advocacy

Pseudonym	Role During Schism	Organisation	Purpose of Organisation
One Participant per Organisation			
Jane	Unofficial leader, flat structure	Activist Coalition 1	Environment, protesting specific project
Neville	Member, President, board member	Service Club 1	Volunteering, social
Owen	Member, President, board member	Service Club 2	Volunteering, social
Karen	Member, President, board member	Service Club 3	Volunteering, social
Philip	CEO	Social Service 2	Health, support
Quinn	CEO	Social Service 3	Member services
Ryan	Middle manager	Social Service 4	Suicide prevention
Linda	CEO	Social Service 5	Trauma support
Meredith	CEO, Board Chair (different schisms)	Social Service 6	Health
Isaac	CEO (also in Social Service 1 cluster)	Social Service 7	Housing
Shaun	Volunteer, committee member, active service role	Volunteer Org 2	Small, country town, safety
Tim	President Vice president	Leisure 2 Leisure 3	Small, country town, member benefit, volunteer
Noemi	President	Sporting Club 2	Niche sport, limited exit options
Van	Organiser of interclub tournament	Sporting Club 2	Niche sport, limited exit options
Rachel	Founder and leader	Sporting Club 3	Biannual fundraising event, other activities
Tilly	Committee member	Church 1	Worship
Sally	Employee	Education 1	Large independent school
Willow	Employee, Treasurer	Education 2	University, publishing

Appendix C Coding Schema

Figure C1 Final Coding Schema

context	greater	CGS	socio-historical perspective	Sensemaking	SO	overview	<i>lived experience of reality construction; in schism contested narratives by definition, liminal space</i>						
		CGP	fields of power		ST	temporality	<i>fixing meaning in flux, iterative, in moment, in hindsight</i>						
	organisa	COC	complexity		SP	purpose/process	<i>reduce uncertainty enable action through plausible narrati</i>	MSCV	development of conviction (right cause/action/narrative/good orgn				
		COD	demographics, structures		SI	interruption: trigger to sensemake	<i>awareness, expectation, surprise, sudden</i>	MSN	new ideas/different ideas or perspectives				
		COB	back story, history, previous schism		SD	data: primary (mindfulness, filtered, active, te	<i>information, tests, evidence, information, events</i>	MST	tension, paradox				
		COF	counterfactuals		SK	knowledge: secondary (synthesised)	<i>thinking, knowing, judging (motives)</i>	MSA	attack, threat, disorder				
		COP	people, individuals; personality, capacity, ethics, perspectives etc		SN	narrative: plausible, rationalise, sensegiving	<i>understanding, explaining, justifying</i>	MSB	breach norm, rules				
		COL	leadership (void)		SA	action orientation	<i>assessing, deciding, acting</i>	MSF	faultline				
		COS	crisis, change		SG	goal, strategy, ideology, narrative commitmen	<i>committing, iterative with each response</i>	MSS	supporters, alliance, factions, act of gaining support				
	commun	CCI	identity (demise, change, threat, good of orgn)		SR	resolution, climax, outcomes, autopsy	<i>retro explaining, judging, in light of 'end'</i>	MSNC	narrative construction, trigger vs real issue				
		CCU	unity/plurality		SE	epilogue	<i>reflecting</i>	MSG	sub-group formation, unity, commitment, self-protection, bystander				
		CCM	membership, boundaries					MSBC	breakdown communication, diff groups diff info, most people unaw				
		CCB	belonging (volunteers, responsibility to club, purpose, value to member)					MSBT	breakdown trust, building trust, ill will				
Active h	language	ALC	communication important	Schism	MD	defining		MSZ	personalization, ego (all about me), personal attack				
processes		ALP	speech acts (incl truth claims, informal networks)		MN	normal (but unique) (avoidance, common, overtakes life, drama)		MSE	escalation, move and countermove, perspective, attempts to resolve				
		ALL	labelling (incl stigma, positioning)		MT	types, incl averted		MSC	cooperation, competition, compromise				
		ALS	schismogenesis (incl act early)		ML	lived experience, loss, includes emotions and physical and mental effects (after a while dic		MSO	open conflict, gauntlet throwing, ultimatums				
		ALM	metaphor, euphemism		MS	stages <i>expanded opposite</i>		MSM	meetings				
		ALN	narrative (purposes, common)		MO	outcomes		MSOH	outside help				
	power	APT	tactics, strategies, politics, 'illegitimate', bullying, undermining		MLJ	lived exp injustice, right and wrong, good and bad, ethics		MSP	significant public acts, anchor points, climax or mini-climax				
		APW	weaponisation		MLE	lived exp emotion - feeling (incl loss, grief, fear, consuming)		MSV	vote, big decision, big reveal (or not)				
		APL	'legitimate', governance, authority, culture, reputation, rationality		MLB	lived exp body - doing, embodiment (incl loss, hardship instrumental, energy)		MSPS	(perception) power shift, gain formal authority				
		APS	support (subgroup leadership, dynamics, makeup, unity, collective action)		MLC	lived exp cognitive/psych - thinking (eg time, indecision, surprise, lack agency, threat, consuming, r		MSX	exit, exit options, exclusion, threat of leaving, reasons for leaving				
		APA	agency, energy (naivete, righteousness, choice, fate, permission, legitimacy, avoidance)		MLM	lived esp metaphorical, anecdotal, language		MSW	end of episode, winning and losing				
		APC	power is contested, balance of power, battle, war, also as a check (sharing p		MLI	lived experience identity, group, relationships		MSR	recovery, learning, damage, work done to recover				
								MSI	re-integration. Marginalisation, future exclusion				
								MSNG	start new group, join new group, act in same way in other groups				
			<i>added good quotes column 27/6/18 - before this a bit random</i>										

Figure C2 Extract from Code Frequency Spreadsheet

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	27a	27b	28	29	30	31	32	33	34	35	36	37	38	39	40	41				
APT	12	7	13	20	0	21	17	46	3	38	23	35	37	52	96	44	9	13	10	15	8	24	31	2	4	9	68	13	6	23	14	13	0	9	35	24	42	12	23	14	1	13	10	909			
APW	9	0	0	9	0	14	4	11	5	0	27	26	38	9	36	17	7	2	14	12	10	12	2	16	12	8	49	3	1	1	2	1	1	1	12	0	0	0	21	5	0	5	1	403			
APL	31	14	29	43	6	39	60	62	35	17	55	32	64	40	67	26	41	41	29	9	22	55	23	15	30	9	54	5	5	21	19	4	3	22	23	87	14	48	31	10	7	33	10	1290			
APS	26	17	7	15	7	11	4	3	4	17	3	24	6	6	24	10	2	0	1	0	11	4	10	0	7	3	1	0	0	31	9	10	5	8	7	17	1	3	2	0	1	2	321				
APA	36	8	28	53	6	20	31	31	67	37	48	9	53	60	36	22	9	40	35	52	42	34	78	16	15	26	32	12	0	22	25	8	13	9	25	31	37	18	14	14	9	41	11	1213			
APC	21	5	18	17	3	24	18	10	20	1	4	2	12	3	25	22	0	1	5	1	0	1	27	13	9	6	6	1	3	8	1	9	2	3	16	14	2	5	8	5	0	7	3	361			
SO	3	2	1	1	1	0	0	0	0	1	3	1	6	0	3	1	1	4	3	15	0	3	20	0	0	2	12	5	2	5	1	0	0	0	0	1	0	0	0	1	0	0	0	98			
ST	33	0	16	14	6	20	14	27	25	34	4	10	41	17	40	18	10	32	22	17	13	13	53	16	9	10	31	15	1	52	23	14	34	5	27	40	35	24	12	5	18	12	19	881			
SP	2	0	0	2	0	0	0	4	8	25	1	0	9	17	2	11	1	7	23	30	7	12	33	10	0	1	22	6	2	7	6	1	20	10	7	10	7	3	0	8	2	8	2	326			
SI	23	5	10	12	7	18	8	39	22	16	18	2	64	18	23	37	5	19	24	13	9	15	91	18	11	14	38	8	1	19	22	0	24	13	31	11	12	18	4	1	11	24	15	793			
SD	10	15	17	0	5	11	5	23	16	31	26	37	81	39	55	31	2	3	17	8	23	9	31	18	23	4	34	4	1	16	11	3	12	8	14	7	31	26	25	14	11	19	29	805			
SK	22	20	26	12	11	12	16	18	24	30	24	66	132	34	35	32	0	24	14	9	8	14	17	5	22	12	32	4	3	16	20	9	20	18	14	32	19	13	4	0	14	19	40	916			
SN	32	18	7	68	14	55	49	70	33	43	76	30	137	94	126	40	22	11	56	60	27	27	75	38	37	29	61	14	1	52	22	7	22	10	26	62	52	9	35	36	31	14	28	1756			
SA	17	17	23	32	21	13	9	25	46	36	50	18	58	46	50	7	11	39	40	34	12	30	34	12	5	12	30	2	0	40	13	11	37	7	23	39	28	32	11	13	15	13	6	1017			
SG	3	6	6	3	7	1	2	1	2	14	15	8	8	5	1	6	1	0	1	27	0	1	0	0	1	0	0	0	0	0	0	0	0	5	0	0	1	1	0	0	1	3	0	0	130		
SR	19	6	39	8	4	18	16	12	16	24	16	42	26	9	22	21	2	7	14	5	0	14	37	3	9	5	14	4	5	28	10	9	30	3	25	6	20	18	1	3	13	5	6	594			
SE	36	5	19	12	2	7	8	15	15	18	1	10	2	9	28	12	4	18	20	13	5	9	17	3	7	13	10	6	0	19	9	4	6	1	4	3	7	4	0	0	2	2	1	386			
MD	0	0	0	0	1	0	0	1	0	0	0	0	0	0	0	0	0	1	6	1	5	0	1	1	0	0	0	1	0	1	2	2	7	2	11	0	0	2	0	0	0	8	2	55			
MN	13	0	5	9	4	12	14	27	32	11	25	1	16	8	2	3	11	22	16	18	9	28	32	3	9	3	1	0	0	16	9	4	4	3	8	3	7	9	2	1	7	17	9	433			
MT	0	0	2	0	1	1	0	2	0	0	0	1	0	0	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	0	3	0	0	1	1	0	0	0	1	0	0	15
ML	159	1	60	93	65	62	60	85	109	118	77	148	180	144	138	104	54	103	184	187	92	119	245	79	51	80	182	80	12	200	101	67	181	64	83	231	185	156	55	63	71	80	74	4682			
MLJ	23	13	7	16	4	16	15	19	16	25	39	22	112	48	60	24	10	41	88	68	40	30	65	22	16	18	72	30	4	60	15	10	53	27	34	59	65	53	31	14	19	34	28	1465			
MLE	42	13	11	26	26	21	8	28	40	30	22	22	34	14	28	33	14	14	51	20	22	19	66	25	8	13	56	30	5	52	36	20	59	13	9	54	40	38	11	14	32	16	19	1154			
MLB	18	11	11	9	18	4	5	9	4	16	7	22	7	16	13	15	3	12	20	30	17	23	19	4	7	8	17	7	3	33	21	7	54	7	9	45	35	23	8	17	19	17	21	671			
MLC	33	30	21	7	14	1	1	3	8	18	5	41	13	17	5	24	9	24	26	45	13	30	61	15	8	11	29	9	3	59	23	20	54	16	24	96	53	62	8	26	21	17	11	1014			
MLM	2	7	6	0	8	0	0	2	0	2	0	7	0	0	4	3	0	2	1	1	0	1	1	1	3	3	3	3	0	9	9	6	3	8	8	46	11	5	12	12	6	1	8	204			
MLI	28	BC	BC	16	9	10	11	18	25	20	6	22	10	33	10	0	4	8	17	17	5	23	36	12	10	24	20	12	0	18	19	24	30	8	14	30	23	24	3	2	4	14	7	626			
MS	96	39	71	151	35	131	123	214	125	180	141	110	275	197	289	150	145	184	200	198	126	160	247	70	122	105	324	102	22	215	164	102	187	61	175	268	168	198	102	66	91	130	143	6402			
MO	2	1	1	5	0	13	35	10	0	4	1	9	0	20	2	4	5	3	11	4	4	5	11	0	14	2	6	5	3	29	8	2	7	1	4	5	19	8	2	8	2	0	0	275			

Figure C3 Extract from Narrative Coding

168	COB			MSE	and um I come from a really really strong trauma background, this is nothing compared to what else has happened to me in my lifetime.
169			SK	MSI	But I knew that I needed to cut that person out of my life.
170	COL	ALP	ST	MSX	So the minute I resigned, from, when that letter came out, we all were like, 'yeah fine', we were all out of there.
171		APT		MSBC	But she banned all the other volunteers and staff from having, um she issued a...(K: murmur - communication) with any of us.
172					So, um, something went out um... (K: it's about controlling the flow of information) yep yep yep yep so um, you know,
173				MSBC	so, it looked, I don't know what was said or whatever, you know,
174		ALN/ALP	SA	MSX/MSR	we wrote up this amicable statement as a board, the f-, the one, all of us that had left because, you know, one was the chair and you know all that s
175	COL	APC	SN	MSW	and you know she just stepped back in and took over again (cynical, resigned).
176	CCI	ALN	SN	MSNC/MSC	And um, and it was yeah, it was it was awful because I, I know that I had done such good work, and I know that I, we were reaching more people. W
177	CCI/COS		SN	MSA/MSB/M	We were getting a bigger profile but the profile wasn't centred around her. Yeah.
178	COL				And I remember, um, you know when I did Leadership WA, what they do for Leadership WA is they bring all these leaders together, it's like a six or
179	COF/COL	ALL			and the reason that I ended up with this scholarship is that they get um people to come out, leaders once a month, and speak about their stories. Li
180	COF			ML	So they're like 'oh, do you wanna?' and I'm like 'oh, no, like, I'm not a leader, I've got nothing' you know.
181	COF	ALP		ML/MSZ/ML	Anyway, so that was the first time I... and it was like oh, it was just, you could have heard a pin drop, it was just, but it was because I was so... and I c
182		APA		ML	But the impact that it had, on a room full of 50 potential leaders was just, it was incredible.
183	COS		ST	MSA	So all of a sudden, there's more than one person out there telling their story, and actually they're doing like a really really good job of it. Yeah.
184		ALP/APV	ST	MSA/MLJ/M	Um, so um yeah, so all of a sudden, when that email came out, I remember, I was driving somewhere, that email came out. I read it, um, I saw all th
185		APT		MSNC/MSB	and all this sort of stuff 'by telling the students that they needed to... ' or actually saying to the students you need to not send students in here bec
186				MLJ	And to me that was just so not okay, it was SO not okay.
187				MLJ/ML	Um, you know, but because of the dynamics it was awkward, was just horrid.
188	COF	ALC/ALP/APA		MLJ/MSE	And, luckily for me, I had already, I'd already started.. and I'd been working with my psychologist for six months on the best way to try and tell her h
189				MLB	you know I lost so much weight, and um,
190		ALC/APA		MLB/MLC	it was just trying to actually voice...
191		APA	SN		and I obviously never did it (K: you never did it?) no
192	COF	APA/AP1	SI	MSA	(K: do you regret that now?) well, I didn't do it in a way that, 'cause once that came out, once that email came out, with those things, and it was, you
193	CCB		SI	MLJ/MSA/M	and it was, I'm like 'oh my god, I've just spent the last five years of my life f- dedicate, and this is what you're telling these people that I've done'

Appendix D Interim Model of Schism

Interim Model Description

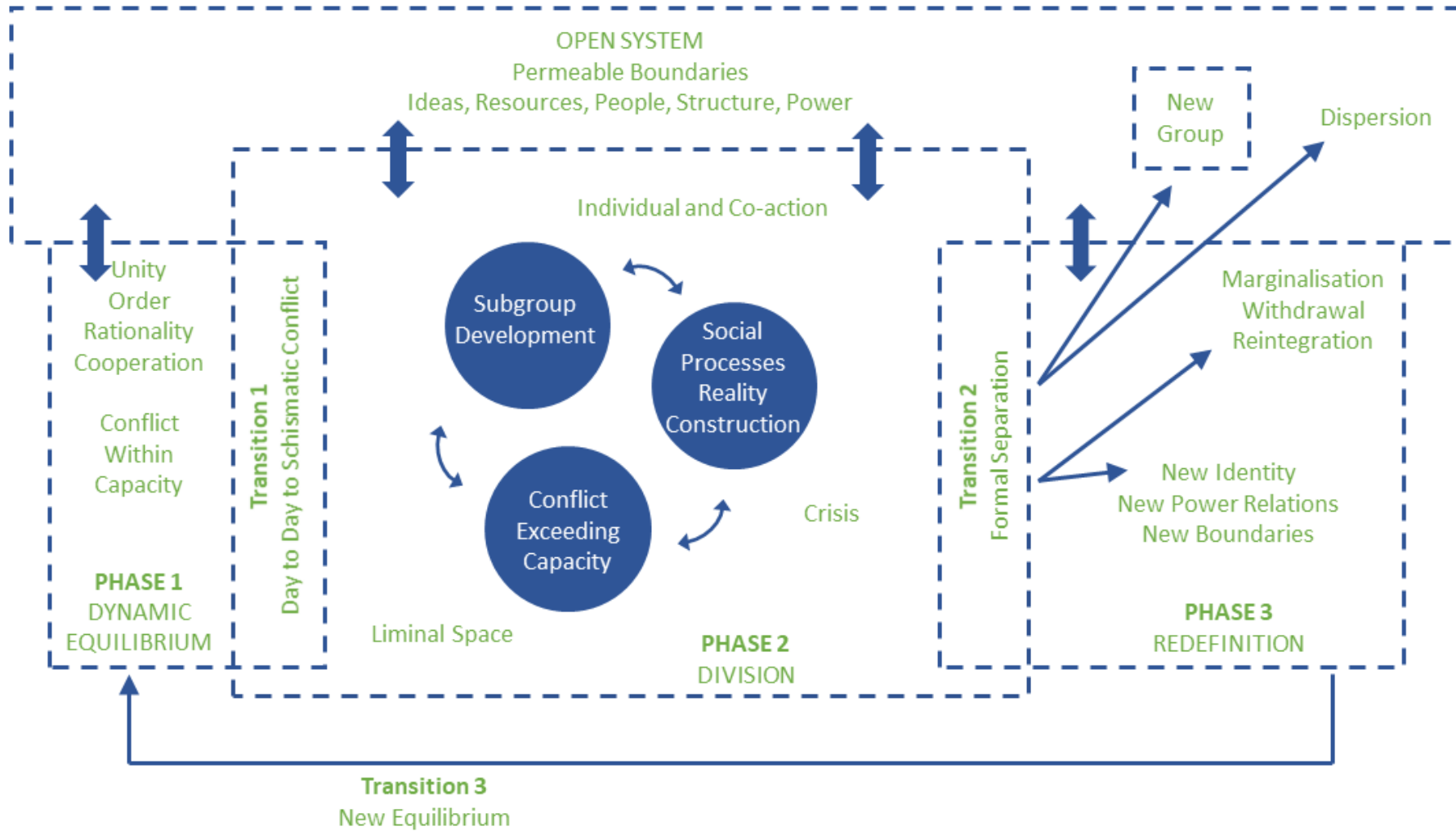
Figure D1 depicts a process model of schism in a nominally bounded organisation or group, within a complex open system. It is assumed organisations have periods of relative unity and cooperation versus division and conflict. Boundaries are assumed to be permeable, for example to people, knowledge, and power.

The model identifies three phases and three transitions, representing a cyclical social process of differentiation, conflict, and change. Phase 1 is dynamic equilibrium, a state of relative unity, relative order, cooperation, a single dominant narrative. Conflict is manageable by the group within existing structures. Transition 1 is from everyday conflict to schismatic conflict. The transition may be overt or subtle but there is a change in the quality of the lived experience. This transition is likened to a trigger, crossing a threshold, or passing a point of no return.

Phase 2 is division. Lived experience in the division phase is of crisis and liminality, and of both individual and co-action. Multiple individual and group identities co-exist in tension. Subgroups develop. Social processes of reality construction are ongoing and are increasingly subjective and contested. Conflict resolution processes are insufficient to manage conflict. Transition 2 is formal separation. This transition is a high point of crisis, tension, stakes, and emotion, and typically marked by a detectable climax. One subgroup is perceived to lose and the other to win. Exit costs and options, and subgroup unity and purpose, influence whether formal separation takes the form of a mass exit, and whether a new group forms.

Phase 3 is group redefinition. The most obvious way is by mass exit. Other transformative changes include new identity or leaders or, more subtle but not less significant, loss of trust or a shift in cultural norms. Change can be circumstantial, subconscious, or conscious. Transition 3 is when redefinition cedes to a new dynamic equilibrium, and changes are normalised. The group is in recovery, and heightened threat perception recedes compared to everyday imperatives.

Figure D1 Interim Model of Schism



Interim Model as Lens for Emerging Themes

During data analysis, attempts were made to find underlying themes in the literature and data, which may hold the key to resolving inconsistencies between models and findings in the literature. Themes were organised using the interim model as a lens (see Figure D2).

The advantage of this approach was each theme was manageably small for research purposes. Each theme typically had a well-developed literature, separate to schism literature, to provide a conceptual framework for research and a community of policy and practice. From a practical standpoint, it highlighted multiple options for practitioners. They could focus on strengths or weaknesses. Intervention in one row could create reaction in another, for example, reducing the general sense of uncertainty people felt helped them behave less defensively and more cooperatively. When some avenues of de-escalation seemed blocked, others could still be effective.

This approach inherited the problems of the interim model and, furthermore, functioned more as a summary of existing ideas rather than contributing something new. It was out of scope to work on improving the practicality or theoretical rigour of these ideas, once the linear group process conceptualisation of schism was superseded.

Figure D2 Schism Themes Emerging Using Lens of Interim Model

	Pre-schism	Schism			Post-schism	
Process nature	Phase 1 Dynamic Equilibrium	Transition 1 Schism Threshold	Phase 2 Schism Construction	Transition 2 Schism Climax	Phase 3 New Equilibrium	Transition 3 Normalisation
Division	Unity	Faultlines become salient	Developing schism	Recognise fundamental differences	Split, reintegrate, subsume, subjugate	Unity within group/s
Conflict	Cooperation	Tension, trigger	Contest, point no return	Ultimatum, climax	Submit, defy, resolve	Renewed cooperation
Subgroups	“We”, whole group salient	Formation, activation, mobilisation, “Us and them”, subgroup salience, contest between subgroups or subgroup and whole group, subgroup membership fluid but increasing commitment		“Winners and losers”	Adjust membership status, boundaries of subgroups	“We”, marginalised or separated ‘them’
Power	Existing power structures	Subgroup power increases until capacity to contest whole group identity and activities, actively seek power in many forms, power shifts common over time		Power distribution determined, often by public act or vote	Power redistributed	New power structures
Identity (social system)	Shared identity Sub identities	Identity subversion, identity conflicts	Whole group identity contested, subgroup identities emerging	Limits of identity elasticity, whole group identity chosen/affirmed	New shared identity, subgroup identity subsumed or new group	Retrospective construction of identity congruence or incongruence
Narrative	Dominant narrative, sub-narratives	Rumour and gossip, sensegiving, framing and positioning, multiple contested emerging narratives, use of experience and myth (familiar narratives)			Construct new narrative, construct history retrospectively	
Phenomenon nature	Order	Disruption	Chaos	Resolution	Clarification	New order
Lived experience	Normality	Liminal space: uncertainty, ambiguity, novelty, re-construction of order and meaning Crisis (individual): surprise, high threat to important values, short decision time Crisis (social system): change in quality, quantity and intensity of interactions Multiple identities in tension, personal identity threat			New order and meaning Re-establish norms, certainty Reduced sense of crisis	Normality
Sensemaking	Heuristics, routine, rationality	Surprise, attention	Reduce uncertainty Information, hypothesis, test Cognition, embodiment, sensing, emotion, judging	Knowing, deciding, acting	Process, rationalise, judge (including cause, blame, outcome), reflect	Heuristics, routine, new rationality
Judgment	Tolerance, justice	Dissent, injustice	Value judgment: good/bad, right/wrong, good of the group/good of subgroup or person, legitimate/illegitimate, righteousness, contest over value orientation: positions, intentions, purpose, strategy, tactics, and behaviours		Punishment/reward Stigmatisation Retrospective judgment Can be contested	Acknowledgement/claims of justice/injustice
Relationships	Cooperative, trusting	Breach of norm, breach trust	Alliances/loyalties form/shift Competitive, antagonistic Loss of trust, breakdown communication, secrecy, loss of empathy	Ingroup/outgroup dynamic	Sever/consolidate relationships, rebuild trust, renewed commitment/responsibility to each other	Cooperative, trusting
Boundaries	Membership status clear, social system bounded	Membership status challenged, can be new members	Boundaries extra permeable to power, change, people Boundaries more flexible, shifting, forming		Membership status redefined, often mass exit	Social system boundaries redrawn
Leadership	Leadership structure stable	Leadership change, void, multiple or distributed	Leadership/leaders emerging, contesting	Leadership choice, asserted, imposed	New or affirmed leadership structure	Leadership structure restabilised