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Through the Double Lens of the "Marginal Man" and Biography: Intellectual Diversity Among Chinese Students at Chicago

Xiaoli Tian[1]

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Abstract

The "marginal man" is a classic concept developed in early sociological studies of immigrants at the University of Chicago. This paper selects the work of three Chinese students (Ching-chao Wu, Rose Hum Lee, and Paul Chan-Pang Siu) from the Department of Sociology at the University of Chicago and comparatively analyzes their studies on Chinese immigration within the context of their life history. Although their research is based on the concept of the "marginal man," their conclusions point in different directions. Among them, Wu turned the conflict that Chinese immigrants face between the old and new into advantages in cultural transmission and integration, thus emphasizing the positive role of the "marginal man" in the process of civilizational convergence. Lee, however, argued that the assimilation of Chinese immigrants in American society is not only possible but also necessary, and proposed that immigrants should strive to escape the embarrassing situation of being a "marginal man" and become completely Americanized. Siu proposed the concept of "sojourners" based on his decades of ethnographic observations of Chinese laundry workers and argued that compared to the "marginal man," who is destined to assimilate, Chinese immigrants spend their entire lives pursuing return to their homeland rather than integration. These different observations of Chinese immigrants not only stem from differences in research methods and field experiences, but are also closely related to the personal life histories of the authors. Their own life histories in the United States are intertextual with their research, thus providing a rich source of empirical evidence for immigration studies.

Keywords Chicago school · Immigration · History of sociology · International students

✉ Xiaoli Tian
xltian@hku.hk

[1] Department of Sociology, The University of Hong Kong, Room C0922, The Jockey Club Tower, Centennial Campus, Pokfulam, Hong Kong

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Table 1 Statistics of Chinese Ph.D. students at U.S. universities from 1905–1960

	University	No. of graduates	% of all graduates
1	University of Illinois	204	7.3
2	Columbia University	203	7.3
3	Harvard University	165	5.9
4	University of Michigan	150	5.4
5	Cornell University	144	5.2
6	University of Chicago	143	5.1
7	University of Wisconsin	134	4.8
8	Massachusetts Institute of Technology	104	3.7
8	University of Minnesota	104	3.7
9	University of California	88	3.2
10	Ohio State University	85	3.0
	Total	2789	100

Sources are from Chen (2009) and Yuan (1961)

The early twentieth century witnessed a wave of Chinese students seeking education abroad (Chen, 2009; Yan, 2010). The Department of Sociology at the University of Chicago has played a crucial role in the education of Chinese students.[1] According to *A Guide to Doctoral Dissertations by Chinese Students in America, 1905–1960*, compiled by Tung-li Yuan (1961), a total of 2,789 Chinese students acquired doctoral degrees from 116 U.S. universities during that period. Among those students, 143 (approximately 5% of the total) graduated from the University of Chicago, thus ranking the university sixth in terms of granting doctoral degrees to Chinese students. Additionally, 53 of the Chinese students at 23 different universities majored in sociology, with 14 of them enrolled at the University of Chicago—over a quarter of the total number (see Table 1 for statistics of Chinese Ph.D. students at U.S. universities from 1905–1960 based on Yuan's calculation). According to the available data, 25 Chinese students graduated from the Department of Sociology at the University of Chicago: 14 with a doctoral degree (see Table 2 for list of Chinese Ph.D. students in the Department of Sociology at the University of Chicago), 9 with a Master's degree, and 2 with a Bachelor's degree.[2] Sociology ranked third in the number of doctoral degrees awarded to Chinese students pursuing a Ph.D. at the University of Chicago (Chen, 2009; Xiong, 2020).

Table 3 reveals that 5 out of the 16 Chinese students who earned doctoral degrees from the University of Chicago focused on Chinese immigrants in the U.S. This is

[1] Sociology and anthropology at Chicago were in a joint "Department of Sociology and Anthropology" until they became separate units in 1929. This paper uses "Department of Sociology" to refer to the joint department before 1929 and the individual Department of Sociology after 1929.

[2] The statistics on the number of Chinese students may be inconsistent or incomplete because of the different methods of calculation and different data sources.

Table 2 List of Chinese Ph.D. students in the Department of Sociology at the University of Chicago (1905 – 1960)

	Name		Year of graduation
1	Wang, Tsi-chang	王芑章	1925
2	Fan, Ting-chiu	范定九	1926
3	Wu, Ching-chao	吴景超	1928
4	Liao, Wen-keui	廖文奎	1931
5	Yen, Ching-yueh	严景耀	1934
6	Dai, Bingham	戴秉衡	1937
7	Rose Hum Lee	谭金美	1947
7	Wu, Pek-si	吴百思	1945
8	Ni, Ernest In-hsin	倪因心	1948
9	Lee, Shu-ching	李树青	1950
10	Pan, Ju-shu	潘如树	1950
11	Tsuo, Yi-chuang Lu	邹卢懿庄	1950
12	Siu, Paul Chan-pang	萧振鹏	1953
13	Huang, Lucy Jen	黄仁华	1954
14	Chou, Jung-tê / Chow, Yung-teh	周荣德	1958

Sources are from the University of Chicago library

not a mere coincidence. Rather, it reflects a deliberate strategy by the Department of Sociology at the University of Chicago to recruit students from diverse ethnic and cultural backgrounds. These students were encouraged to study immigrant communities in the U.S.—particularly in Chicago—from an "insider" perspective. This approach has been discussed extensively in previous scholarship. Given the linguistic and cultural differences of Chinese immigrants, research on Chinese migrant groups depended almost exclusively on Chinese students. In this paper, I will focus on three individuals, as their dissertations specifically relate to Chinese immigrants in the U.S., with particular emphasis on the concept of the "marginal man."

The "marginal man" is a classic concept proposed in early immigrant studies by the Chicago School of Sociology. This concept, which originated from the subjective experience of migrants, describes the personality and spiritual crises caused by the conflict between new and old experiences during the assimilation process. The concept of "marginal man" has had a long-lasting impact on immigrant research at the Chicago School (Park & Burgess, [1921]1969), and can be traced to Simmel's theory of the stranger, with the term itself being coined by Robert E. Park in the 1920s.

The concept of "marginal man" has echoes in Simmel's understanding of the stranger: individuals who are physically close to us but remain socially distant, thus remain outside the group and in opposition to the group. Specifically, Simmel ([1950]1964) defined the stranger "as the person who comes today and stays tomorrow… the *potential wanderer:* although he has not quite overcome the freedom of coming and going. He is fixed within a particular spatial group… But his position in this group is determined, essentially, by the fact that he has not

Table 3 Ph.D. thesis titles of Chinese Ph.D. students in the Department of Sociology at the University of Chicago

Topic	Name	PhD thesis title
American Chinese	Fan, Ting-chiu	Chinese Residents in Chicago
	Wu, Ching-chao	Chinatowns: A Study of Symbiosis and Assimilation
	Lee, Rose Hum	The Growth and Decline of Chinese Communities in the Rocky Mountain Region
	Siu, Paul Chan-pang	The Chinese Laundryman: A Study of Social Isolation
	Huang, Lucy Jen	Dating and Courtship Innovations of Chinese Students in America
Urbanization	Wu, Pek-si	Social Characteristics of Increasing, Stable, and Decreasing Cities
	Ni, Ernest In-hsin	Social Characteristics of the Chinese Population: A Study of the Population Structure and Urbanism of a Metropolitan Community
Social Structure	Tsuo, Yi-chuang Lu	A Study of Dominant, Equalitarian and Submissive Roles in Marriage
	Chou, Jung-tê / Chow, Yung-teh	Status Mobility of the Chinese Gentry: A Field Study of Social Status and Social Mobility of the Gentry in Kunyang Hsien, Yunnan Province, Southwest China
Other	Wang, Tsi-chang	The Youth Movement in China
	Liao, Wen-keui	Morality versus legality; historic analyses of the motivating factors of social conduct
	Yen, Ching-yueh	Crime in Relation to Social Change in China
	Dai, Bingham	Opium Addiction in Chicago
	Lee, Shu-ching	Social Implications of Farm Tenancy in China
	Pan, Ju-shu	A Comparison of Factors in the Personal Adjustment of Old People in the Protestant Church Homes for the Aged and the Old People Living outside of Institutions

Source: University of Chicago Library

belonged to it from the beginning, that he imports qualities into it, which do not and cannot stem from the group itself" (Simmel, [1950]1964, p. 402).

The concept of the stranger has influenced important ideas such as social distance, marginality, and cosmopolitanism, for, according to Simmel ([1950]1964), strangers are part of the system, yet they are not closely bound to it. As a result, the concept of the stranger is linked to changes in physical space, such as entire groups (e.g., nomadic tribes), individuals with specific functions (e.g., traveling salesmen), or travelers in general. Despite the social distance, marginality arises because the stranger, according to Simmel ([1950]1964, p. 406), is "close to us, insofar as we feel between him and ourselves common features of a national, social, occupational, or generally human, nature" while also being "far from us, insofar as these common features extend beyond him or us, and connect us only because they connect a great many people."

Ultimately, the concept of the stranger was applied to migrants and marginal members of a society by Robert E. Park (1926) in his urban ecology work. Park (1926, 1928) introduced the concept of the "marginal man" to explore the subjective experiences of immigrants during the assimilation process, including European Jews, Christian converts in Asia, and mixed-race people in the U.S. and Asia who all live in two worlds. For example, Park (1928) described how emancipated Jews were a "marginal man" and a "stranger" in Simmel's sense in light of the post-confinement personality change that was culturally hybridized; that is, the marginal man is "living and sharing intimately in the cultural life and traditions of two distinct peoples; never quite willing to break… with his past and his traditions, and not quite accepted, because of racial prejudice, in the new society in which he now sought to find a place" (Park, 1928, p. 892). Park identified this hybridized personality as a characteristic shared amongst other groups navigating two worlds, from mixed race "Mulattos" to Christian converts in Africa and Asia who, he noted, may exhibit "many if not most of the characteristics of the marginal man—the same spiritual instability, intensified self-consciousness, restlessness, and malaise" (Park, 1928, p. 983).

Therefore, Park's "marginal man," as an immigrant, struggles to transition into American society without fully giving up his previous life; yet assimilation might be partial. If the assimilation model is seen as the final stage of an impersonal ecological cycle, "marginality" can be viewed as the subjective experience of that process (Park, 1950, p. 887). An immigrant's marginality, then, describes the conflicted lived experience of being too Americanized for the original community and too foreign for American society.

This paper highlights the far-reaching impact of the concept of the "marginal man" and delves deeper into particular histories of researchers who developed the concept by selecting the work of three Chinese students from the Chicago School of Sociology between 1905 and 1960, including Wu Ching-chao, Rose Hum Lee, and Paul Chan-pang Siu, to conduct a comparative analysis of their research on Chinese immigrants by incorporating their life histories. I focus on their understanding and development of the concept of the "marginal man" in their research, and explain why these researchers have varying perspectives on

Chinese immigrants at that time, as well as how their individual life experiences influenced their research approaches and conclusions.

Wu Ching-chao (1901–1968)

Wu Ching-chao was born in Anhui, China. He graduated from Tsinghua University in 1922 and then studied sociology and anthropology at the University of Chicago. His classmates included renowned sociologists Herbert G. Blumer, Everett Hughes, and Robert Redfield. Both his master's thesis, "*Chinese Immigrants in the Pacific Region*" (1926), and doctoral dissertation, "*Chinatown: A Study of Symbiosis and Assimilation*" (1928) utilized concepts of human ecology—the vanguard of the Chicago School—such as competition, symbiosis, conflict, and adaptation, to analyze the relationship between Chinese immigrants and American mainstream society. The 16th chapter of his dissertation is titled "The Marginal Man," which argued that Chinese migrants, "sooner or later, transformed into a marginal man, a new personality which is the subjective aspect of the fusion of cultures" (Wu, 1928). His language aligned with that of Park on the marginal man: "[T]he conflict of cultures which is inevitable when incompatible ideas and practices are brought together goes on just in the mind of the marginal man. His mind is the real melting pot of cultures" (Ling, 2012, p. 191).[3]

Wu emphasized that "marginal men," including overseas students, play an active and crucial role in cultural exchange between the East and West, as well as in the social reform of China. The "marginal man" not only has the desire for reform but also acquires the capability to do so. Indeed, many of the reforms in China were started or supported by those who received both a Chinese and Western education. Through such collective efforts, many cultural traits that initially had a vague presence were more widely promoted. Ultimately, the distinctions between the Eastern and Western cultures start to fade as cultural fusion begins, and the two cultures adopt the traits of one another to become a new cultural identity.

Therefore, Wu was receptive to and recognized the concept of the "marginal man" by emphasizing its positive outcome: exposure to new cultures meant that the marginal man could reform the old society. This resonated both with his identity as an overseas student and the early 20th-century intellectual trend in China to "save the nation," which was concerned with how newly obtained Western-based knowledge could help to transform an underdeveloped China into a modern state.

After receiving his doctoral degree, Wu returned to China in 1928 and began to teach sociology at universities in Nanjing, Beijing, and other cities. His academic work focused on issues related to industrialization and land systems in

[3] On life of Wu Ching-chao and Fan Ting-chiu, see Chinese Students' Alliance in the United States of America (1907–1930); Hashikawa (1940); Su (2004); Who's who in China, 1918–1950 (1982); Who's who of American returned students (1978); and Xie (2009). See also the webpage of Department of Sociology, Peking University: http://www.shehui.pku.edu.cn/wap/second/index.aspx?nodeid=1252&page=ContentPage&contentid=1819

Table 4 Wu Ching-chao: Major published books

Year of publication	Publication title
1929	《都市社会学》(Urban Sociology)
1929	《社会组织》(Social Organization)
1930	《社会的生物基础》(Biological Basis of a Society)
1934	《从佃户到自耕户》(From Tenant Farmer to Self-sufficient Farmer)
1937	《第四种国家的出路》(The Fourth Type of State)
1943	《中国经济建设之路》(The Road to China's Economic Development)
1947	《劫后灾黎》(Life after the War)
1991	《唐人街: 共生与共化》(Translated from his dissertation, China-towns: A Study of Symbiosis and Assimilation)

Table 5 Wu Ching-chao: Major published journal articles

Year of Publication	Publication Title
1929	孙末楠传 (Biography of Sun, Monan)
1930	解释中国男多于女的几种假设 (Several Hypotheses that Explain Why There Are More Men than Women in China)
1931	两汉的人口移动与文化(上) (Population Mobility and Culture in Former and Later Han Dynasties I)
1932	两汉的人口移动与文化(下) (Population Mobility and Culture in Former and Later Han Dynasties II)
1933	季亭史传 (Biography of Ji, Tingshi)
1934	国际生活程度的比较 (Comparison of International Living Standards)

China (Xie, 2009, p. 192). He contributed to understanding and analyzing the nature of Chinese society, especially social classes, rural land issues, tenancy, and population (Xie, 2009, p. 195). Tables 4 and 5 provide a list of his major publications, and they show that after his return to China, Wu did not continue his work on immigration issues.

During the same period of time, another Chicago School-trained Chinese student, Fan Ting-chiu (范定九), followed a similar path as that of Wu. Like Wu, Fan obtained his Ph.D. from the University of Chicago two years earlier in 1926. After graduation, he also returned to China and published *"A Concise Dictionary of Sociology (*社会学简明词典*)."* However, his published journal articles primarily focused on issues related to Christianity. For instance, he published 18 articles in *The General Assembly Bulletin* and five articles in the *Nanking Seminary Review (*金陵神学志*).*

The published work of Wu and Fan shows that they conducted little to no research on immigration after returning to China, which suggests that their dissertation focus on Chinese immigrants in Chicago might not have been driven by their personal research interests. Their backgrounds also help explain this lack of interest. The most obvious factor is their language barrier. Wu originated from

Anhui Province in northern China and attended an American preparatory school in Beijing before studying abroad. Therefore, he did not speak the dialects of the Chinese immigrants at the time, which were mainly the southern Chinese dialects of Cantonese, Fujianese, and Taishanese. Similarly, Fan originated from Hunan Province and did not understand the common dialects spoken by Chinese laborers in the U.S. He enlisted the help of a Chinese government official, Alfred S.K. Sze, to introduce him to Chinese immigrants and organizations. His primary data sources came from community leaders who spoke Mandarin and supported his research. Wu, on the other hand, used secondary data from the race relations work of Park in the 1920s and applied Park's theory of immigrants as marginal men.

Wu and Fan had similar backgrounds and experiences. They both completed their primary education in China, went to the U.S. to obtain their doctoral degrees, and then returned to China to teach at the university level. In fact, they had no personal experience with Chinese immigrants, nor did they have an in-depth understanding of the overseas Chinese immigrant communities. Therefore, their research on Chinese immigrants can be seen as simply meeting their doctoral degree requirements with little relation to their own experiences and circumstances. This explains why they did not continue this line of research after returning to China. However, two of their Chicago School peers, Rose Hum Lee and Siu Paul Chan-pang, led very different academic pursuits because research on Chinese immigrants was not only their focus but also closely tied to their personal lives.

Rose Hum Lee (1904–1964)

Rose Hum Lee was born to a relatively affluent Chinese immigrant family in 1904 in Montana, U.S. Her father was originally from Guangdong Province and emigrated to the U.S. in the 1870s. He worked as a laundryman, miner, and farm laborer, and eventually settled in Montana, where he opened a grocery store and became a successful local businessman. His wife also emigrated to the U.S. with him. Lee was the second child among their seven children. At the time, very few Chinese immigrants were able to bring their wives to America, so the circumstances of her parents were quite unusual. Lee grew up privileged and spoke English fluently.[4]

Lee began to receive an American education at an early age. Under the guidance of her mother, she gained an understanding of the importance of education and independence, which contributed to her excellent academic performance. After graduating from high school in 1921, she worked as a secretary at a local university where she soon met and dated Ku Young Lee, a Chinese international student also from Guangdong Province who was attending the University of Pennsylvania. They married on June 21, 1925, in Pennsylvania. However, under the *Cable Act* passed in 1922, while women could become naturalized U.S. citizens, if they married an

[4] On Rose Hum Lee's life, see Chen (2002); Ling (1999); Ogilvie and Harvey (2000); Yu (2001). See also: https://montanawomenshistory.org/women-on-the-level-with-their-white-sisters-rose-hum-lee-and-buttes-chinese-women-in-the-early-twentieth-century/

individual of foreign nationality, they would lose their citizenship. As a result, Lee lost her citizenship (Sadlier, 2016).

In 1931, Lee went back to China with her husband and lived in Guangzhou, a city in Guangdong Province. Yet, despite eschewing life as a housewife by working in various institutions, Lee faced many struggles in Guangzhou. Her marriage was an unhappy one, and her in-laws were very critical of her since she could not bear children. Eventually, Lee adopted a daughter, but when her marriage ended, Lee returned to the U.S. with her daughter in 1939. Her experiences in China left her with a negative impression of traditional Chinese society and further highlighted the values she experienced in the U.S. in a positive light. Lee even imported the comparison to U.S. contexts, describing Chinatown as narrow-minded, bound by tradition, and corrupt, while she felt American mainstream society was fair, free, and honest.

After she returned to the U.S., Lee resumed her education. In 1942, she obtained a B.S. degree in Social Work from the Carnegie Institute of Technology in Pittsburgh. In the same year, she was admitted to the University of Chicago to continue her studies. Initially, she was a student in the School of Social Work and Administration, but soon transferred to the Department of Sociology. She completed her Master's degree the following year, and then obtained her Ph.D. in 1947.

During her studies, Lee supported herself through jobs giving lectures and writing articles about Chinese society, which were curiosities at the time. She delivered speeches to a variety of organizations, including clubs, schools, and women's associations. Her topics included Chinese art, old and new Chinese customs, U.S.-China relations, the Kuomintang Party (political party in Taiwan), Chiang Kai-shek (head of the Kuomintang Party), and more. Different organizations, such as the Women's Club of Wisconsin, provided positive feedback about her, and the fact that she grew up in the U.S. and was a native speaker of English contributed in part to her popularity. Indeed, her dual identity became her selling point—she could speak fluent English but also had typical Chinese characteristics, such as wearing traditional, long Chinese gowns and even selling Chinese crafts and small antiques (Yu, 2001).[5] This unique characteristic might have also stemmed from her merchant family background: she understood the "market" demand and her own positioning. These work experiences also paved the way for her future career.

In 1945, Lee was hired as an assistant professor at Roosevelt University. In 1956, she was appointed as the chair of the Sociology Department at Roosevelt and became the first woman and Chinese American department chair (1956–1961) in the U.S. This was not only a major achievement for her, but also a reflection of the exceptionally progressive values of Roosevelt University. In the early 1940s, there were few universities in Chicago, and private universities limited the enrollment of Jews, Catholics, and Black students. Even public universities practiced racial discrimination.

[5] Henry Yu believed that Rose was proud of her Chinese identity, but selectively—she did not agree with negative components of the Chinese culture, such as traditional gender relations, while feeling proud of Chinese art, philosophy, and other cultural symbols. Her time in China made her realize the value of her American identity (Yu, 2001, p. 130).

The founder of Roosevelt University, Edward Sparling, originally worked at Central YMCA College,[6] which claimed a liberal spirit. However, witnessing the discrimination of the board against different ethnicities compelled Sparling to resign, and he ultimately founded a new higher education institution—Roosevelt University (originally Roosevelt College) (Sparling, 1970, pp. 33–43). The widow of the late President Roosevelt, Anna Eleanor Roosevelt, gave a speech at the inauguration, saying: This institution aims to "provide educational opportunities to the persons of both sexes of the various races on equal terms" (Sparling, 1970, p. 71, see also Weiner, 2019). The institution's policy of equality was reflected in both its student body and its faculty. Roosevelt University had far more non-White, non-American, and female assistant professors and senior faculty than any other university in the U.S. at the time (also see Table 9 in the Appendix). Lee earned recognition from Roosevelt University because of her established reputation and specialization in research on Chinese Americans, and she was subsequently invited to join the sociology department, even though she had not yet obtained her Ph.D.

Lee became not just an accomplished sociologist in academic circles, but she was also well-regarded in Chicago society. For example, she received the Outstanding Woman Award of the Greater Chicago Area, and she was invited to participate in an overseas academic delegation to visit 13 European countries and study their social welfare systems.

Although Lee was trained in sociology with the ability to analyze data without imposing her own values and objectively distancing herself, her doctoral dissertation often featured her personal opinions and feelings (Ng, 2006, p. 4). For instance, she described Chinatown as a lawless, isolated, and un-American area where the local Chinese had their own networks, businesses, and organizational associations. Such self-organized groups allowed the Chinese to form self-contained communities, which made cultural assimilation impossible. In her view, cultural assimilation is crucial because even though Chinese Americans have legal citizenship, they are still seen as foreigners, and their legal status could be revoked at any time. Cultural assimilation, therefore, is an intrinsic symbol that represents their true belonging in America (Ng, 2006, p. 9). This perspective may have been influenced by her own experience of losing her citizenship after marrying a Chinese person, which also explains why she greatly emphasized assimilation. Consequently, the assimilation theory of the Chicago School provided Lee with the theoretical foundations for her view.

Moreover, her identity as a woman contributed to her distinct reflections of Chinese traditional family values and gender norms. Since, at the time, Chinatown was mostly a self-contained community and Chinese American women had little contact with the outside world, they remained confined by old cultural norms and behaviors. After Lee received her Ph.D., the women in Chinatown did not congratulate her; instead, they spoke ill of her behind her back (Ng, 2006, p. 9). This experience is similar to how she was criticized for her inability to bear children when she was in

[6] This college was closed since many faculty members and students left and transferred to Roosevelt University in 1945.

China. Her life experiences only reinforced her belief that women needed to become American citizens, as they have the greater responsibility to nurture the next generation and instill in them the "correct" cultural unity (Lee, 1960).

Since the Chinese American community did not accept her research and viewpoints, her relationship with American Chinatowns reached a breaking point in her later life, and this coincided with the betrayal she endured in her second marriage. Lee was bogged down with romantic disputes with her second husband because he continued to have an affair with his ex-wife, Mrs. Yu, even after marrying Lee. Lee's husband even cohabited with Mrs. Yu in Phoenix while maintaining a substantial marital relationship without divorcing Lee. In 1959, Lee began to write letters to a government agency that accused Mrs. Yu and her relatives in the U.S. of being "Communist sympathizers." She showed evidence that Mrs. Yu had sent a "large sum" of over $3,000 to her family in mainland China in 1951. In April 1960, Lee also publicly engaged in written polemics in the press with a Chinese community leader in San Francisco, Lee Pan-lim, to express her anger toward the Chinatown community.[7] During the height of McCarthyism, she further reinforced the argument in her research that Chinese Americans should fully assimilate into American society. She argued that the old culture, traditions, and organizations associated with Chinatown were the greatest obstacles to assimilation. This extreme argument exacerbated her conflict with Chinatown.

Lee also faced rejection from U.S. publishers who did not perceive the importance of her book, *The Chinese in the U.S.,* even though she was the first Chinese and the first woman to hold the position of department chair at an American university, and despite it being one of the few studies on Chinese Americans at the time. Her book was not published in the U.S., but instead by the University of Hong Kong Press, and Lee herself financed part of the publication costs (Yu, 2001, p. 238).

Additionally, Lee's work on Chinese immigrants in the U.S. continued to argue, following Robert Park, that assimilation is the only way to solve social issues caused by the marginal man status (Lee, 1956). Yet, her later arguments greatly deviated from Park's views, and her overemphasis on assimilation led her to some inaccurate hypotheses. For example, she stated that Chinatown would eventually disappear due to assimilation, and this disappearance would significantly facilitate the integration of Chinese immigrants into American society (Cheng, 2006, p. 1077). Although Park also predicted the disappearance of Chinatown, his prediction was based on the *Immigration Act* of 1924 that would shut the nation's doors to immigrants, and on the lack of growth that the Chinese immigrant community would face because it was a heavily male "bachelor society" and thus was not reproducing itself (Park, 1926, p. 151). Lee's overemphasis on the total assimilation of the Chinese population in the U.S. also differs from Park's more pluralist view. Namely, Park allowed for partial assimilation and cultural diversity, whereas Lee's goal was for Chinese immigrants to become physically and culturally homogeneous with mainstream Americans, which she believed would also resolve racial discrimination by White

[7] For more details on Lee's second marriage and her conflicts with the Chinatown communities, see Yang (2022).

Americans (Lee, 1960). In other words, she argued that Chinese Americans, especially the second generation, should not remain in the awkward and excluded position of the "marginal man" but instead they should become Americanized like herself. She also attempted to place her research on Chinese immigrants in the U.S. into the broader context of the global Chinese diaspora by advocating that integration is equally applicable to all overseas Chinese.

Throughout her life, Lee tried to explain why Chinese immigrants were not fully accepted as Americans. Her emphasis on the differences between the Chinese and Americans was partly rooted in her understanding and experience as a woman in two different cultures, and as such, her research interests, life experiences, and gender identity were closely intertwined. She felt that being Chinese meant accepting traditional domestic gender roles, but becoming an American represented a more modern and educated female role. In her research, Lee used her family as a typical example of successful assimilation into American society. From her uneducated immigrant mother to her own achievements as a Chinese woman in the U.S., this process proved that Chinese people not only could, but should, assimilate into American society. Moreover, the experiences of her two marriages further compelled her to embrace her American identity: an educated, successful, professional woman.

Even by current standards, Lee was a prolific writer and a highly accomplished scholar (see Table 10 in the Appendix for a list of her publications). However, later in life, her relationships with her research subjects soured (Yang, 2022); her arguments were almost abandoned after her death, and they were shown to be historically erroneous (for example, Chinatown did not disappear and not only persisted but new forms of ethnic communities made their appearance in the U.S. (Song & Liang, 2019; Zhou & Kim, 2006). Additionally, citation statistics for her work (see Table 6) indicate that it does not have a lasting impact when compared to our next subject, Siu Paul Chan-pang.

Paul Chan-pang Siu (1906–1987)

Paul C. P. Siu was born to a farming family in Taishan, Guangdong Province. His grandfather was a local scholar, and his father seemed to be an open-minded person. In 1911, when the Qing dynasty collapsed, his father was the first in the village to cut off his queue (the traditional male hairstyle of the Manchu people of Qing China). His father also helped Siu receive a better education by sending him to an American missionary school in Guangzhou, where he was baptized and named Paul. This experience laid the foundation for his English skills. However, the family's financial situation deteriorated during his youth and his father, who had never done physical labor, went to St. Paul, Minnesota to work as a laundryman and support his family of eight. In 1927, 21-year-old Siu obtained a student visa and joined his father in Minnesota. Siu deeply felt his father's hardships.[8]

[8] On life of Paul Siu, see Siu, P. C. & Tchen, J. K. W. (1987). *The Chinese laundryman: A study of social isolation*. New York and London: NYU Press.

Table 6 Highly Cited Publications of Siu Paul Chan-pang and Rose Hum Lee

Published Year	Publication Title	Citation Calculation	
Siu, P. C. (1952)	The Sojourner. *American Journal of Sociology*, *58*(1), 34–44	1952–1980	28
		1981–2000	100
		2001–2024	370
		Total	498
Siu, P. C. (1987)	*The Chinese Laundryman: A Study of Social Isolation*. New York: NYU Press	1987–2000	98
		2001–2024	250
		Total	338
		Total	**836**
Lee, R. H. (1948)	*The Growth and Decline of Chinese Communities in the Rocky Mountain Region*. Chicago: The University of Chicago	1948–1980	2
		1981–2000	24
		2001–2024	45
		Total	71
Lee, R. H. (1949)	The Decline of Chinatowns in the United States. *American Journal of Sociology*, *54*(5), 422–432	1949–1980	27
		1981–2000	10
		2001–2024	57
		Total	94
Lee, R. H. (1949)	Research on the Chinese Family. *American Journal of Sociology*, 54(6), 497–504	1949–1980	19
		1981–2000	3
		2001–2024	12
		Total	34
		Total	**199**

The table compares the most highly cited work of Siu Paul Chan-pang and Rose Hum Lee

[b] The citation statistics are from Google Scholar because most publications are not included in Web of Science (too early in publication years)

After a few years there (he also studied at Macalester College but did not receive a degree), Siu moved to Chicago in search of better job opportunities. He worked in a chop suey take-out restaurant during the day and attended school in the evening. Several years later, his father joined him in Chicago and opened a laundromat. During those years, Siu put much effort into earning his living, and as a result, he did poorly in his studies. Just as he was about to give up, his classmates introduced him to a sociologist named Ernest Burgess in 1932, which turned his life around. Burgess noted Siu's talents, his ability to speak the Taishan dialect, his familial connection to laundry workers, and his close connections with the broader Chinese immigrant community. Therefore, Burgess offered Siu a scholarship at the University of Chicago to support his research on Chinese laundry workers in the U.S. At the time, the Chicago School was actively recruiting students with diverse backgrounds to conduct in-depth participant observations of immigrant communities from an insider perspective.

Siu proceeded to conduct ethnographic research on the laundry worker communities in Chicago and Boston. During his fieldwork, he worked as a delivery person for a laundry shop, lived with the laundry workers, and interacted with them as a social worker. Siu further became familiar with the Chinese communities beyond Chicago when, as a member of the Chinese Students Association in North America (Young et al., 1936, p. 27), Siu campaigned across the U.S. to call for solidarity among all Chinese to resist the Japanese invasion of China (Young et al., 1936, p. 27). His language abilities (knowledge of dialects), life experience (as an immigrant himself), and social circle (friends and relatives who were laundry workers) contributed to his fieldwork and added more depth and detail to his research. Consequently, he keenly captured the differences in psychological factors (such as the psychology of fear) between Chinese immigrants and other immigrant groups in America.

Siu largely completed his research work and writing in the early 1940s. However, with the encouragement of Burgess, he accepted a job as a social worker for Chinese immigrants in Boston. This decision led him to delay his dissertation defense and interrupted his academic career. It was not until the 1950s that Siu returned to the research field and published an article titled "The Sojourner" in the *American Journal of Sociology* in 1952. Finally, as the deadline for his doctoral research approached and Burgess retired, Siu defended his dissertation, "*Chinese Laundryman*," in 1953, at the age of 47. At the time, Siu was an experienced social worker with more than 25 years of work experience. By living with Chinese immigrants and gaining their trust, Siu gathered numerous stories from Chinese workers. He recorded everything about the laundry workers, including the coarse language they used, their gambling, and their jokes. This experience contributed to the success of his fieldwork.

Extending Simmel's discussion of the "stranger" and starting from Park's marginal man, Siu developed a concept used to describe the Chinese laundry workers that was similar yet distinct: the "sojourner." A sojourner is defined as "an individual who clings to the heritage of his own ethnic group and lives in isolation" (Siu, 1952, p. 44). Unlike the bicultural complex of the marginal man, the core characteristic of the sojourner is their adherence to their original culture. Unlike

the marginal man who longs for assimilation (though often unfulfilled and stopped in isolation), the sojourner is unwilling to become a permanent resident of the host country, since the sojourner views their stay as an *economic adventure*. The adventure might be long or short, but will eventually end. Returning to one's homeland, rather than staying in the host country, is the ultimate goal of the sojourner.

After defending his dissertation, Siu submitted his doctoral thesis to the University of Chicago Press, but was rejected because his work lacked "market value." The Press had its own criteria and the public had its own preferences (Siu & Tchen, 1987, pp. 34, 39). Burgess pointed out that Siu had missed the "golden years" for publication (Siu & Tchen, 1987, p. xxxix, see also Bogue & Burgess, 1964). It is possible that this judgment was related to the falling influence of Park's theory (Athens, 2013). Additionally, Siu's perspectives on immigrant theory and ethnic relations may have challenged prevailing notions of race and assimilation at that time, particularly those associated with Park's "race relations cycle."[9] Although groups like Asian immigrants had a "permanent racial costume," it was seen as a genetic trait, and they were expected to achieve cultural assimilation (Americanization) through social interaction, which was considered the inevitable final outcome (Lal, 2017; Park, 1950, pp. 149–150). However, Siu did not subscribe to those ideas. He believed that Chinese immigrants would not assimilate, for two key reasons: 1) their ultimate goal was to return to their homeland rather than stay in the U.S. This is similar to the missionaries in China, whose identity is inseparable from their background and, therefore, they would not assimilate; and 2) the exclusive laws and discrimination created a psychology of fear, which further isolated these immigrants from American society.

Siu emphasized the mentality as a sojourner based on his own life experiences. He and his wife had been approved to change their student visa to permanent residency, but as he mentioned in a letter to Burgess in 1948:

> *We can become American citizens if we choose to do so. At the present time, however, we are still sojourners. As soon as the political situation improved, we would be ready to go back to China. (quoted from* Eilbaum (2022*, p. 483))*

It is clear that Siu consistently emphasized his inevitable return to the motherland.

Moreover, without publication of his dissertation, Siu could not secure a tenured position after graduation. He taught at various schools, including Kansas Wesleyan University, Park College, and Yankton College. During his teaching career, some of the students complained about his English. It is likely that he spoke English with an accent because he moved to the U.S. at 21. Eventually, he received tenure at the Detroit Institute of Technology, where, as he said, "… no one complains about my

[9] Blackman (2023) points out that Park's "race relations cycle" was not a central, empirically validated theory within academic sociology but rather a conceptual framework presented in more popular writings. Athens (2013) also criticized Park's "race relations cycle" as not grounded in systematic empirical research to substantiate its claims. Instead, it was based on anecdotal observations and philosophical reasoning. This "race relations cycle" may not be an idea the First Chicago School was committed to. But it is undeniably an influential idea at that time.

English" (Eilbaum, 2022, p. 483). He retired from the Detroit Institute of Technology as chair and professor of the Sociology Department in 1971.

Like Lee, Siu also embodied his experiences in the form of an anonymous third person in his research work as it was also closely related to his own life experiences. However, unlike Lee, Siu showed deep sympathy for his participants. While Lee saw herself as a successful example of an assimilated Chinese American, Siu always considered himself to be navigating between the roles of a marginal man and a sojourner. Ultimately, he settled in New Jersey. In his elderly years, he continued to long for his homeland, although he never actually made the trip back to China (Eilbaum, 2022).

Compared to Lee, Siu did not publish much (see Table 7 for publications of Siu). Only one academic paper has been found: the one he published in the *American Journal of Sociology* in 1952. Another study is a paper written in Chinese, and his book was not published until 1987.

Siu's book can be compared to *Bitter Strength: A History of the Chinese in the U.S., 1859–1870*, written by historian Gunther Barth in 1964, who also used the concept of the sojourner. Barth (1964) argued that while the Chinese Exclusion Act and discrimination against the Chinese people certainly existed, the impression that Chinese immigrants were only seeking to make money in America and then return to China also influenced Americans to accept Chinese immigrants. These factors are interconnected. After its publication, Siu's book continued to influence research on the history of Chinese Americans. This influence may be related to the rise of the civil rights movement in the 1960s, which challenged mainstream racial attitudes. It is also possible that this revived interest in Siu's work is related to the emergence of the new social history approach, led by scholars like E.P. Thompson (1963), that set the new bottom-up research agendas and obliged scholars to pay more attention to marginalized groups and the everyday lives of ordinary people. By this token, Siu's doctoral dissertation was itself positioned in a transitional period.

In the 1980s, historian John Kuo Wei Tchen rediscovered Siu's dissertation through a footnote. He developed a deep interest and, upon learning that Siu was still alive, tracked him down and facilitated the publication of the dissertation. Finally, 35 years after Siu's defense, his dissertation was published in 1987. Siu's book provides extensive and detailed research data for subsequent studies on Chinese Americans. Unfortunately, Siu did not witness the publication of his book. One month before the book was published, Siu passed away at the age of 81.

Table 7 Publications of Siu Paul C. P

Year of Publication	Publication Title
Siu, P. C. (1952)	The Sojourner. *American Journal of Sociology*, *58*(1), 34–44
Siu, P. C. (1987)	*The Chinese Laundryman: A Study of Social Isolation*. New York: NYU Press
Siu, P. C. (1977)	*Měiguó zásuì guǎn* [Chop Suey Restaurants in the U.S.], *Qishi Niandai*

Interestingly, Siu's work received more attention from historians than sociologists, even after the publication of his book, including Madeline Yuan-yin Hsu, Phillip Q. Yang, Erika Lee, John Jung, and Ling Huping. Siu's book inspired all of these scholars to research American Chinese workers, particularly the laundry man (see Table 8), perhaps because his research focused on the pre-World War II period and on workers whose identities were largely anonymous.

As part of his fieldwork, Siu collected firsthand historical records, which are especially relevant and invaluable for historical research, particularly in social history. Historian Daniel Walkowitz wrote the introduction and commented that Siu's research fills a gap and serves as a good paradigm for the "new labor history" (Siu & Tchen, 1987, p. 19). Historian Henry Yu also pointed out that Siu's description of the lives of laundry workers provides invaluable firsthand historical data, which was more significant than his sociological analysis (Yu, 2001, p. 193).

Although Siu has gained scholarly attention, his Chinese name is still unfamiliar, and there are currently at least four different versions: 萧成鹏, 萧振鹏, 肖臣鹏, and 萧臣鹏. Ling (2010) used 萧成鹏 in her paper "*Chinese Chicago: Transnational Migration and Businesses, 1870s–1930s,*" but then used 萧臣鹏 in her book "*Surviving on the Gold Mountain: A History of Chinese American Women and Their Lives*" (Ling, 2012). Chen (2002) used 萧振鹏 and classified Siu as a new social historian after the 1960s. Perhaps Chen was not aware that Siu's research began in the 1930s, that his doctoral dissertation was completed in 1953, and that it is actually a sociological study. Considering his Taishanese identity, 萧振鹏 seems to be a more appropriate version in Taishanese or Cantonese. The ambiguity that surrounds his name also reflects the paradox of the sojourner: he spent his life longing to return to his homeland, but even his original name has become ambiguous.

Table 8 Impacts of Paul Siu on history scholarship in the U.S

Authors	Publication Title
Henry Yu (2001)	*Thinking Orientals: Migration, Contact and Exoticism in Modern America*. New York: Oxford University Press
Madeline Yuan-yin Hsu (2000)	*Dreaming of Gold, Dreaming of Home: Transnationalism and Migration between the U.S. and China*. Stanford: Stanford University Press
Yang Phillip Q. Yang (2000)	"The 'Sojourner Hypothesis' Revisited", *Diaspora,* 9(2), pp. 235–283
Ericka Lee (2003)	*At America's Gates: Chinese Immigration during the Exclusion Era, 1882–1943*. Chapel Hill: University of North Carolina Press
John Jung (2007)	*Chinese Laundries: Tickets to Survival on Gold Mountain* Cypress. CA: Yin & Yang Press
Ling Huping (2012)	*Chinese Chicago: Race, Transnational Migration, and Community Since 187*0. Stanford: Stanford University Press

Relationships between Biographical and Conceptual Lenses: From "Marginal Man" to "the Sojourner"

While the research of the three scholars is grounded in the concept of the "marginal man," they have individually reached entirely different or even opposite conclusions influenced by their biographies. Among them, Wu recognized "marginal man" as an explanation for American Chinese immigrants, and reframed the tensions between the old and new cultures that Chinese immigrants faced as an advantage in the process of cultural transmission and integration. That is, Wu emphasized the positive role that the "marginal man" can play in the blending of cultures. "Marginal men" like him are agents of social reform. This is consistent with his status as an international student who eventually went back to reform China. Lee believed that the assimilation of Chinese immigrants into American society is not only possible but necessary. She advocated that Chinese immigrants should strive to escape the awkward position of being "marginal men" and become fully Americanized. In contrast to the recognition and advocacy of the marginal man concept and assimilation theory, Siu, based on decades of ethnographic observation of Chinese laundry worker communities, proposed the concept of the "sojourner." He argued that, unlike the marginal man who is destined to assimilate, Chinese immigrants spend their lives striving for return to the homeland rather than integrating into the host society. As we have seen, the diversity of their observations on Chinese immigrants not only stemmed from different research methods and fieldwork experiences but also from their personal life histories, thereby providing rich empirical data for studies on Chinese Americans in the early twentieth century.

The difference between a "sojourner" and "marginal man" is that the former adheres to their own ethnic culture and psychologically refuses to become a permanent resident of the host country. Assimilation is a process of mutual integration of memories, emotions, and attitudes with others through shared experiences and history. Instead, since work is their only objective, sojourners are not interested in participating in local affairs; the goal of their work is to elevate their social status in their homeland and eventually return to it (see also Hamilton, 1978). Thus, this work is also tied to new experiences, security, and prestige. The work they engage in has an "alien" element: it is foreign to local residents, and this business causes no competition with locals—for example, the laundry trade. Conversely, among sojourners, there is fierce competition within their own ethnic group.

Siu was inspired by the "sojourner attitude" and "settler attitudes" used by Clarence Glick. In his writing, Glick (1938) suggested that the attitude of the early Chinese "sojourners" in Hawaii was reflected in their connections with their

homeland, including significant remittances to families and maintaining ties to their homeland through Chinatown. He believed that the "sojourner nature" of Chinese immigrants prevented them from assimilating into mainstream culture, which also contributed to the Chinese Exclusion Act.

The research of both Lee and Siu aligns with "the stranger" as per Simmel and "marginal man" as per Park. However, due to their different personal backgrounds, life experiences, relationships with research subjects, and most importantly, gender roles, they ultimately developed their studies in different directions. As for identity, Siu considered himself a passerby even in his senior years, emphasizing the "sojourner," but Lee's life experience compelled her to believe in assimilation. The reason is likely because Lee grew up in the U.S., while Siu moved to the U.S. as an adult, and these experiences influenced their views on the U.S. and identity.

The shift from the "marginal man" to the "sojourner" reflects a paradigm shift in immigrant studies. Siu's concept of the "sojourner," which was initially overlooked due to its opposition to the mainstream assimilation model, has been rediscovered and gained recognition from mainstream scholarship. With Lee's acclaimed work largely overlooked in later years and Siu's previously neglected work gaining recent attention, we can see that the emergence and fate of academic concepts are intricately and delicately connected to larger political and social environments. This is not only because the political environment shapes research topics, but also because of public interest and concerns. Furthermore, the circumstances of the scholars themselves are influenced by the larger environment. With these relationships taken into account, the shift from "marginal man" to "sojourner" also encourages reflections on the relationship between the "mainstream" and "marginal" perspectives in academic research.

Due to limited data sources, many interesting questions were not fully discussed in this article. For example, Rose Hum Lee and Paul Siu had overlapping time periods in Chicago, both being scholars studying the Chinese immigrant communities in America, yet their attitudes and views towards Chinese immigrant communities were vastly different. It is unknown whether they ever had discussions on this topic. Furthermore, the influence of scholars' gender and personal experiences on research orientations is worth further exploration in future studies, possibly through comparative studies involving more female scholars. Another research direction worth considering is comparing studies on Chinese immigration across different time periods and regions, such as Chen Da (Chen, [1939]2011) and Wang Gungwu's (Wang, 1991, 1992) research on Southeast Asian Chinese immigrants, in order to further explore the complex relationships between research paradigms, researchers' personal biographies, and historical contexts.

Appendix

Table 9 List of Faculty Members (Assistant Professors or higher, Non-white/Non-American/Females Only) at Roosevelt University: 1945 to 1946

	Major	Name	Gender	Ethnicity	Position
1	Chemistry	Edward Chandler	Male	African American	Assistant Professor (1945)
2	Philosophy	Estelle De Lacey	Female	Unclear	Lecturer (1945), Assistant Professor (1946)
3	Political Science	Tarini Prasad Sinha	Male	Indian	Assistant Professor (1945)
4	Political Science	Frank Untermyer	Male	German (likely)	Lecturer (1946), Associate Professor (1950)
5	Education	Frances R. Horwich	Female	U.S	Associate Professor (1946)
6	Accounting	Samuel Waldo Specthrie	Female	Jewish	Professor (1946)
7	History	Helmut Hirsch	Male	German	Teacher (1945), Assistant Professor (1946)
8	Biology	Bernard Greenberg	Male	Born in Ukraine	Teacher (1946), Assistant Professor (1947)
9	Sociology/Anthropology	John Gibbs St. Clair Drake	Male	African American	Assistant Professor (1946)
10	Economics	Abba Ptachya Lerner	Male	Russian	Visiting Professor (1947), Professor (1948)
11	Economics	Walter A. Weisskopf	Male	Jewish	Associate Professor (1945)
12	Linguistics	Otto Wirth	Male	German Jewish	Assistant Professor (1945)
13	Linguistics	Dalai Brenes	Male	Unknown (likely non-white)	Assistant Professor (1946)
14	Linguistics	Lorenzo Dow Turner	Male	African American	Professor (1946)
15	Music	Florian Muellers	Male	German	Teacher (1945), Associate Professor (1946)

Between 1945–1947: 44 individuals held positions at assistant professor level or more senior

[b] Ethnicity records for some individuals are still missing

[c] Source is retrieved from the Roosevelt University website: https://www.roosevelt.edu/stories/news/equality-experiment-history-roosevelt-university; Faculty Directory

Table 10 Publications of Rose Hum Lee

Year of Publication	Publication Title
Lee, R. H. (1948)	*The Growth and Decline of Chinese Communities in the Rocky Mountain Region.* The University of Chicago
Lee, R. H. (1949)	The Decline of Chinatowns in the United States. *American Journal of Sociology*, 54(5), 422–432
Lee, R. H. (1949)	Research on the Chinese Family. *American Journal of Sociology*, 54(6), 497–504
Lee, R. H. (1948)	Social Institutions of a Rocky Mountain Chinatown. *Social Forces*, 27(1): 1–11
Lee, R. H. (1949)	Occupational Invasion, Succession, and Accommodation of the Chinese of Butte, Montana. *American Journal of Sociology*, 55(1), 50–58
Lee, R. H. (1949)	Chinese Dilemma. *Phylon (1940–1956)*, 10(2), 137–140. https://doi.org/https://doi.org/10.2307/271606
Lee, R. H. (1950)	A Century of Chinese and American Relations. *Phylon (1940–1956)*, 11(3), 240–245. https://doi.org/https://doi.org/10.2307/272010
Lee, R. H. (1952)	Delinquent, Neglected, and Dependent Chinese Boys and Girls of the San Francisco Bay Region. *The Journal of Social Psychology*, 36(1), 15–34
Lee, R. H. (1955)	*The City: Urbanism and Urbanization in Major World Regions.* Hong Kong: Lippincott
Lee, R. H. (1956)	The Recent Immigrant Chinese Families of the San Francisco-Oakland Area. *Marriage and Family Living*, 18(1), 14–24
Lee, R. H. (1956)	The Chinese Abroad. *Phylon (1940–1956)*, 17(3), 257–270. https://doi.org/https://doi.org/10.2307/272877
Lee, R. H. (1957)	The Established Chinese Families of the San Francisco Bay Area. *The Midwest Sociologist*, 20(1), 19–25
Lee, R. H. (1958)	The Stranded Chinese in the United States. *The Phylon Quarterly*, 19(2), 180–194
Lee, R. H. (1960)	The Chinese in the United States of America. Hong Kong: Hong Kong University Press

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