DE GRUYTER

Sonia Coman, Andrea Casey

NEW DIRECTIONS IN ORGANIZATIONAL AND MANAGEMENT HISTORY

DE GRUYTER STUDIES IN ORGANIZATIONAL AND MANAGEMENT HISTORY

Sonia Coman, Andrea Casey
New Directions in Organizational and Management History

De Gruyter Studies in Organizational and Management History

Series Editors
Sonia Coman and Andrea Casey

Volume 1

Sonia Coman, Andrea Casey

New Directions in Organizational and Management History

——

DE GRUYTER

Contents

Chapter 1
Introduction to the Book

New Directions in Organizational and Management History is the first volume in the new series "De Gruyter Studies in Organizational and Management History." Our goal for this book is to represent the aspirations of the series and provide a platform to inspire future volumes in this exciting field. The aspirations of the series include serving as a meeting place to unify the disciplines of organizational and management history. The series will strive for and foster cross-disciplinary scholarship through the inclusion of disciplines that have a tradition of providing creative approaches in organizational and management history scholarship, such as business, organizational studies, psychology, and sociology, as well as seeking and inviting the contributions of other disciplines such as art history, political science, and communication that are pursuing research related to history and memory in organizations, movements, and social enterprises. In addition, this series is dedicated to inclusion of societies and regions of the world that have been underrepresented in scholarship in organizational and management history. Finally, this series will facilitate an interactive bridge between scholarship and practice in organizational and management history through discussions of the practice implications as well as the theoretical and empirical implications from practice.

This book engages with generative discussions in organizational and management studies regarding history and organizations in pursuit of these aforementioned goals. With this first book in the series, we hope to fuel a generative discussion around history and organizations through broadening it to include academicians and practitioners crossing disciplines and countries. We aspire to prompt new avenues for research and dialogue by which our field can continue to embrace the importance of the past and of time in engaging with the significant challenges that global societies and organizations around the world face today.

The foundation for the book lies in the stimulating debates and inspiring discussions regarding history and organizations in organizational and management studies. Through a brief review of some of the critical issues and points of departure in the disciplines of organizational and management history, we hope to illuminate the interconnectedness of these disciplines, identify gaps in the literature, and sketch a model for a unified field of research and study.

In addition, this book proposes opportunities for future scholarship through expanding research to include a wider range of industries and regions of the world and case types to create a richer theoretical toolbox. We analyze some of the most promising of the newest theoretical lenses in these disciplines, such as the emergent theorization of time in contexts such as organizational identity.

In support of these rich theoretical lenses, this book explores and analyzes promising innovative interdisciplinary empirical approaches and methodologies in

the field as well as from other disciplines such as art history, which also focus on history and memory in organizations.

Audience for this book

The primary audience for this book is academic researchers and students in organizational and management history across disciplines, including business, organizational studies, sociology, history, art history, gender studies, and political science. Additionally, practitioners related to these disciplines, such as managers in businesses and nonprofits and curators in museums and other enterprises, for example, are also a potential audience. They could find aspects of the scholarship that are useful in their practice and that could serve as inspiration for new approaches to critical problems facing organizations and the communities with which they interact, or they could nurture opportunities to reconsider and assess designs for and types of data that could be collected to frame and address some of these critical issues.

About the authors

As we come to the field of organizational and management history from different personal and professional backgrounds, different with respect to each other as well as different from those of our colleagues and readers, we are committed to being transparent about our respective outlooks and assumptions, especially inasmuch as they affect the contents of this book. Each of us has tried to remain self-aware and reflexive throughout the very iterative process of researching and writing this book. We have been in a continuous conversation and dialogue with each other as well as with related scholarship and practice and, at times, the scholars and practitioners themselves, as we created sections of the book and engaged in rewriting and adding new components as needed. We persisted through points in time and sometimes weeks in time when the path forward was not clear. We also are aware that the process does not end when the text is published; we may only be at a point of beginning.

As argued by Holmes (2020), "Self-reflection and a reflexive approach are both a necessary prerequisite and an ongoing process for the researcher to be able to identify, construct, critique, and articulate their positionality" (p. 2). Preconceptions in the research process are frequently discussed in relationship to data collection and analysis in designs such as grounded theory (Charmaz, 2014). Charmaz noted that all researchers have their preconceptions about experiences or phenomena (p. 156). She commented that feminist standpoint theorists such as Smith (1987) and Collins (1990) articulate "powerful arguments" (p. 156) about the importance of understanding these hidden assumptions in the research process. Also, as argued by Jones (2016), "Awareness of one's positionality *during* the process of academic writing may be seen to

provide opportunity for one to articulate – to *voice*, in relation to another who also has a *voice*" (p. 67). It is our hope that this book reflects our efforts to adopt a dialogic approach to ideating, writing, and communicating.

Sonia Coman has a Ph.D. in art history from Columbia University and over 5 years of practice experience as curator, head of marketing and communications, head of digital strategy, and art consultant for private art collections, museums, nonprofits, and a business innovation forum. Her research agenda focuses on histories of collecting, histories of art history, mechanisms of creativity and signature style formation, and the interplay of identity and history in organizations. She is passionate about interdisciplinary work and combining qualitative and quantitative approaches to analysis. Beyond her work in practice and academia, Sonia is a published and award-winning poet. She speaks English, French, Italian, Japanese, and Romanian. Sonia is Christian with a strong interest in ecumenical and interfaith dialogue. A U.S. citizen, Sonia was born in Romania and has lived in Austria, France, Japan, Romania, and the United States. She is of mixed European heritage (Romanian, French, German Jewish, and Scottish).

Andrea Casey has an Ed.D. in human and organizational learning from George Washington University. She is a tenured faculty member at George Washington University, and her work is primarily focused on doctoral studies. Her research agenda has explored organizational-level concepts such as organizational memory and identity. Her recently published book examines the relationship between identity and memory through a multidisciplinary perspective. She takes an eclectic approach to research in terms of epistemology and ontology and respects and engages with the contributions of different research perspectives. She is a member of the Academy of Management and the European Group for Organizational Studies. Prior to her career in academia, Andrea was an external management consultant to state government and nonprofit organizations. She consulted on leadership development, organizational change, and strategic planning for more than 15 years. Andrea was born and resides in the United States. She has traveled extensively and had taught graduate courses in Singapore. She has a mixed Eastern European and Scandinavian heritage and Jewish and Christian ancestry. Andrea identifies as a white, cisgender female.

As we worked together on topics of mutual interest, we found a shared love for the field of organizational and management history and a sense of respect for, and affinity with, scholars contributing to this field from different perspectives and at different stages in their careers. We were invited to embark on the coeditorship of this new series, "De Gruyter Studies in Organizational and Management History," in response to what we perceive as a need for a dedicated platform to shape a more unified field across organizational and management history. We hope that this platform will stimulate cross-disciplinary dialogue and enable new directions of research and conceptualization to crystallize and come to fruition.

The goal of this series is to feature new and promising studies in ways that encourage authors to reflect critically on their positioning within the field. We are committed

to representing diverse voices, making available the important scholarship coming out of underrepresented academic centers, and being a home for the global community of scholars in organizational and management history.

Organization of the book

The book is organized into six chapters. Chapter 2, *Rethinking Organizational and Management History,* traces the origin and evolution of organizational and management history, adopting a global and multilingual approach to the literature review. The chapter is divided into three main sections, organized chronologically to sketch a history of the field. First, it explores the early history of three foundational uses of history in literature on organizations, especially businesses and their management, namely historical case studies, history as context, and memory as knowledge. The second section investigates what has been coined as the historic turn in organizational and management studies, from precursors in the 1990s to special issues and books that have elaborated on and challenged the historic turn in the 2020s. The final section discusses new approaches to the intersection of history and organizational and management studies, highlighting rhetorical history, ANTi-history, history as organizing, and history as a resource. Not exhaustive but intentional about representing a diverse range of perspectives, cultures, and time periods, the chapter orients the reader to the opportunities and challenges embedded in the state of the field.

Chapter 3, *Theoretical Framing for Organizational and Management History: Time, History, and Organizations,* focuses on new directions in theoretical framing for organizational and management history. Building on our survey of historical and recent literature from the second chapter, the third chapter explores interdisciplinary approaches, hybrid methodologies, and underexplored theoretical concepts and perspectives. It investigates the relationship between time and organizational identity, asking three interrelated questions: How does an organization's distant past influence its distant future? What impact does this interplay of past and future have on organizational identity? And what role does intentionality play in this dynamic? Different perspectives are considered both separately and in relation to one another, sketching a theoretical model predicated on overlaying multiple paradigms in order to identify their discrete and shared contributions. Through this process, we arrive at a set of propositions for future theoretical work in organizational and management history. We also turn our attention to the methods by which we reviewed, analyzed, combined, and distilled various theories and perspectives from multiple disciplines, suggesting one possibility for cross-disciplinary theoretical work that is both respectful of each field and potentially generative of new ideas and models. Similarly, we dedicate a section of this chapter to reflect on both the advantages and pitfalls of multidisciplinary theoretical frameworks, discussing the combination of relevance and rigor that recent literature has

recommended as key to a sound and useful approach to drawing on multiple disciplinary perspectives.

Chapter 4, *New Directions in Empirical Approaches in Organizational and Management History*, focuses on empirical studies, investigating new directions in the field, particularly the recent surge of interest in historical case studies and in selecting cases from underexplored industries (e.g., creative industries, fashion, gastronomy, the not-for-profit sector). This chapter builds on the previous one to shed light on how theoretical models can be built or further developed by expanding the scope boundaries and criteria in case selection, both temporally (e.g., learning from cases from the past) and spatioculturally (e.g., creative fields, underexplored geocultural contexts, and nontraditional companies and/or organizational structures). Underexplored or new methodological approaches are considered, especially microhistory, metahistory, and the methodological advantages of utilizing both in case study research. We argue that the combined use of micro- and metahistorical lenses, as well as a diversification of criteria for case selection, would help advance the field by posing essential questions at the intersection of time, space, and agency in organizations.

Chapter 5, *Legacy and Change in Purpose-Driven Organizations*, focuses on the history and the role of legacy in organizations whose purpose or *raison d'être* is more than a monetary goal or a product. These include organizations such as nonprofits, government, and new or emerging forms of organizing such as social enterprises or social movements. We theorize the potential tensions that arise between the stability of the founding mission and legacy over time and the potential need to change to adapt to shifts in the external environment related to the purpose and the populations they serve. We explore examples of organizations that in imagining a different future do not imagine or erase a distant past and employ the legacy to set new directions for a near and distant future.

Chapter 6, *Conclusions*, reflects back on the literature review, the state of the field, and new directions in conceptual framing and methodology that this book proposes to the reader interested in organizational and management history. In this concluding chapter, we revisit our interest in interdisciplinary approaches, exploring recent literature on the rigor, relevance, and creativity of adopting and adapting conceptual frameworks and methods from multiple disciplines. In addition, we address current debates in organizational and management history, identifying several topics that we see as central to the field and as opportunities for bridging these debates, namely degrees of conceptual overlap; multiple scales; overlapping layers of time; agentic forces; intentionality and purpose; tensions, oppositions, and binaries; and legacy and change. We discuss the intersection of subfields in organizational and management history, which represents, in and of itself, a defining aspect of the field. We also summarize the "why" of organizational and management history, as we highlight the advantages of the historical approach and of the field's theoretical and methodological innovations for both organizational studies more broadly and for practice.

Chapter 2
Rethinking Organizational and Management History

History permeates all disciplines, and the field of organizational and management studies (OMS) is no exception. That is reason enough to devote attention to it. But doing so raises questions that get to the heart of the matter: When we talk about history in the context of OMS, are we referring to the history of organizations (business history), the history of management styles and practices (management history), the role of history in organizational change or related concepts such as organizational identity and memory (organizational history), the use of historical methods in conducting organizational research, the exploration of organizational phenomena using historical and organizational theories, or all of the above? In this book, we address this metahistory to illuminate the remarkably interrelated ways in which history has been investigated and theorized in OMS. Drawing upon Jenkins' (1991) and others' (White, 1973) ideas on metahistory, we acknowledge that history is essentially a story or a narrative created through the lens of the author or historian and is influenced by social and political forces during the time it is constructed as well as the backgrounds of the authors. This influence surfaces in the events and evidence chosen and how they are constructed into a coherent narrative. We also acknowledge the boundaries and structure of historical events and their influence on this process.

We adopt a multicultural and multilingual approach to this exercise, the results of which provide a foundation and a through-line for the field we delineate – organizational and management history – and our own exploration of ideas pertaining to history and organizations. Our positionality is grounded in our backgrounds, as described in the introduction to this text. Similar to recent authors (Mills & Novicevic, 2020), who provide a reflexivity statement as they explore "key scholarly debates around inclusion of historical approach and the role of the past" (p. 1) in OMS, our positionality guides our work. Our approach in this text emphasizes a multidisciplinary look at the past and future of OMS as well as a focus on countries and cultures that are minimally or not represented in OMS, such as the majority of Africa, Asia, and South America (Cummings et al., 2017). As Cummings and colleagues (2017) asserted, "To think differently about management, we need to shake up the map of management history" (p. 1). Additionally, we take a broader perspective of time. As Cummings et al. (2017) noted, "Business is highly concentrated around North America between 1840 and 1860 and the UK and North America in the first 60 years of the twentieth century" (p. 23). This approach, which broadens our understanding of management history and models, is also supported by scholars such as Bowden and Lamond (2015), as they argue that although business and management historians acknowledge that management as a function in collectives has been with us "for millennia," the focus has primarily been on how modern management practices and models are framed from the perspectives of revolutions attributed to the introduction of the railroads in the United States and the Industrial

Revolution in Britain. Bowden and Lamond's work questions the idea of a universal management model across countries, industries, and time.

Our work encompasses perspectives from the early 20th century to the present, as well as from countries such as France, Japan, and the United States. The perspectives included in this chapter are admittedly fragmentary and reflect our respective familiarity with these literatures and fluency in these languages. As we acknowledge the incomplete nature of the project, we believe that consulting sources from multiple cultures and in multiple languages can create a fuller picture of the history of ideas at the intersection of history, management, and organizations, enabling us to discern at least some differences and similarities.

This chapter has three main sections, organized largely chronologically to sketch a multiperspective historical account of the field. First, it discusses historical case studies, history as context, and memory as knowledge. The second section provides background on the historic turn in OMS, from precursors in the 1990s to special issues and books that have appeared in the 2020s. The final section discusses new approaches to the intersection of history and OMS, highlighting rhetorical history, ANTi-history, history as organizing, and history as a resource.

Historical case studies, history as context, and memory as knowledge

Historical case studies

An obvious, and perhaps the earliest, channel through which history figures in OMS is the historical case study, whether an empirical study of a single organization or a larger project of understanding the past of multiple organizations (in the same industry, in the same geocultural area, in the same time period, or based on other such criteria). From an OMS perspective, a historical case study moves the analysis from the present to an intrinsically more complex territory, that of the past, retrievable only from accounts that are discussed at length later in the book, which often have more to do with authorial perspective than with factual chains of events. From the perspective of the humanities field of history, the use of historical cases in OMS entails a seemingly perilous exercise of extrapolation and theorization, where conclusions can be drawn from studies that lack a more holistic understanding of historical processes and contexts, which would help create a more accurate picture. From the OMS scholar to the historian and everywhere in between, the author's own philosophical positions add to the complexity. This complexity and how it is curated, as well as the assumptions and other predispositions of the historian, is the essence of *microhistory,* the concept from the humanities that we highlight in Chapter 4 (Cohen, 2017). This concept emerged in the 1970s and is a genre of history writing in which a small event, figure, or material

object becomes the focus of the historical account. This approach offers the opportunity to capture the "textures" and "flavors" of history (Duke University, 2020).

The examples we provide on the following pages reflect the semantically dense nature of these early uses of history in OMS. We argue that unpacking the positioning, assumptions, and implications of this wave of scholarship can provide important insight into the foundational notions and structures of OMS.

France

In France, at the turn of the 20th century, a foundational publication was the 1903 *Histoire des classes ouvrières et de l'industrie en France de 1789 à 1870* (A history of the working classes and of industry in France from 1789 to 1870) by Émile Levasseur (1828–1911), a scholar of geography, history, and statistics at the Collège de France. Levasseur is remembered for having combined these disciplines in novel ways, laying the foundation for the subfield of economic geography and pioneering the use of graphs, thematic maps, and statistics for the study of history and political science. His 1903 book theorizes with an eye to how the shared history of for-profit organizations interacts with the larger sociopolitical history of France and its international relations. In this book, Levasseur theorizes only to the extent to which it can advance his social and political views, which was not unique to Levasseur but was fairly common in premodern writing. Levasseur extrapolates from the historical accounts and cases mentioned with the explicit goal of formulating working theories that can be useful in practice. We have encountered a similarly positivist goal of applicability in our review of literatures at the intersection of history, management, and organizations from the same period and later (from the late 19th century through the mid-20th century) published in Japan and the United States.

Levasseur's focus throughout the book is on various aspects of labor relations. Loosely defined and with different disciplinary strands woven in, labor history appears to be a frequent topic for early 20th century publications from France, England, Japan, and the United States that are of particular interest to us as some of the earliest publications that sketch historical case studies and begin to theorize on organizational and management history. From our contemporary perspective, Levasseur's book presents an uneven combination of labor history and business history. Interwoven here to illuminate a history of France from the lens of the dynamic interplay of industry and society, labor history and business history have since developed as discrete fields. Fueled by different if not conflicting worldviews, the two fields rarely communicate with each other, and some scholars have argued for a return to a constructive dialogue and more cross-disciplinary work (Ross & Perkins, 1986).

In the first half of the 20th century, scholars interested in developing historical case studies in France were faced with challenges in conducting archival research and doing historiographical work; challenges were fueled by concerns about divulging industry and company secrets, as well as destroyed or damaged archival records

or claims thereof (Lambert-Dansette, 2000). Claude Fohlen's rich monograph on the textile manufactory Méquillet-Noblot, published in 1955, marked a shift as earlier obstacles gave way to more access to archival resources for scholars (Lambert-Dansette, 2000). After having played a significant role in paving the way for business history scholars, Fohlen moved away from this nascent field to become one of the pioneers of North American studies in France, laying the foundation for French-language sociopolitical histories of the United States and Canada (Heffer & Weil, 2021). In his book on the Méquillet-Noblot company, Fohlen paid particular attention to the interplay between the evolution of the organization and the sociopolitical changes in which it was embedded, researching and analyzing geopolitical factors such as the proximity of the Swiss border and the *longue durée* effects of the organization's responses to sociopolitical situations (Gillet, 1955). We have encountered this longitudinal approach, combined with an interest in sociopolitical factors that are external to the organization – all characteristic of *longue durée* studies – as a successful approach to both historical case studies and theoretical perspectives on organizational and management history in different periods and cultures, as we present throughout this book. After Fohlen's monograph, many other historical case studies were developed and published in France, leading to a flourishing literature with increasingly more informed theoretical ramifications (Lambert-Dansette, 2000).

United States

In the United States, before World War II, historical case studies were more frequently developed, but less as monograph-length, single-focus studies and more as collections of vignettes for instructional purposes. A typical format for literature produced by business school faculty incorporating history was the "casebook." For example, Franklin E. Folts was on the faculty at Harvard Business School in the 1930s. His publications reflect an interest in the organizational structure of businesses and a wide-angle perspective on business history at the intersection of economics and sociology. His *Introduction to Industrial Management* (Folts, 1949), designated as a "casebook," shines a light on early incorporations of history in accounts of industry case studies. Folts came to business administration and history with a background in military strategy; during World War I, he taught artillery tactics in France (Harvard Library, n.d.). As a professor of industrial management, Folts participated in officer training within an education program conducted jointly by the Harvard Business School and the U.S. Armed Services; for this program, Folts taught industrial mobilization (Harvard Library, n.d.). Preserved at Harvard in the Franklin Folts Papers, his teaching materials include a combination of wartime case studies as well as corporation case studies, reflecting the interconnected nature of industry, business, and military history, all geared at the time toward helping the war effort. Also remarkable is the *longue durée* approach to case studies, ranging from contemporaneous case studies to cases drawn from the 18th and 19th centuries.

Folts exemplifies a trend in the years leading to World War II. The combination of business and military strategy, the selection of cases from strategically important industries such as natural resources, and the extraction of lessons from history that could be applied to contemporaneous problems all indicate that historical case studies were conducted and taught for their potential practical applications in response to concerns of national defense and war efforts. Understanding history, discerning patterns, extrapolating from case studies, and extracting lessons to be applied in the here and now – all these approaches gained urgency right before and during the war. Case studies became the foundation of much of the business school curricula in the United States. This practice exemplifies how the history of events, organizations, and managers is curated and narrated to offer examples of everything from best practices to significant mistakes for analysis and learning.

One of the consequences of this trend was that theorizing from case studies was deemphasized: "The changes of attitude consequent on these new demands meant that study, in general, was more devoted to problem-solving than theory generation, and this orientation affected what was written and published during this period" (Grattan, 2013, para. 1). Following World War II, many countries, with the United States in the lead, took organizational practices involving strategy, planning, and personnel deployment that were developed and implemented during the war and worked to translate them into organizational practices in businesses (Clegg et al., 2021). With this movement, foundations and corporations committed to support quantitative management research within business schools (Clegg et al., 2021) with the goal of predicting outcomes and effectiveness with the underlying assumption of managerial control. While the lessons learned and effective practices were grounded in historical cases, they were based on the assumption of causality. "Causality, conceived in terms of spatially and temporally proximate variables, can be controlled and manipulated" (Clegg et al., 2021, p. 233). While the unique assumptions of historical perspective, as noted by Clegg et al. (2021), are grounded in a "conception of causality that is structural or genealogical" (p. 233), this problem-solving orientation delayed the theorization of historical case studies, yet it reinforced, albeit at times unintentionally, the importance of history in business and management studies.

Others who contributed to the early development of management scholarship and practice were Mary Parker Follett and Lillian Gilbreth. They too were working with and in a variety of organizations, from corporations to local social movements, throughout the United States and Europe during the years following World War I. In addition, they were part of interdisciplinary scholarly communities. They drew from their experiences to theorize and advance management theory and practice. As Follet asserted, "Business and society are not discrete fields of human activity – they are so inextricably interwoven as to be conceptually and analytically inseparable. Business and society are infinitely interpenetrative, and neither can be usefully understood in isolation of the other" (Parker, 1995, p. 283).

Mary Parker Follett. Follett (1868–1933) was an American social reformer and a management consultant who worked with governments, business, and community organizations (Hatch, 2018) and served as a presidential advisor (Stout & Love, 2014). She was a social worker by profession, yet she had an interdisciplinary education (Morlacchi, 2021). She is known as a pragmatist along with fellow scholars such as Dewey and Mead, and she drew on William James in her work (Morlacchi, 2021). Reviews of her work highlight this connection in acclaiming her scholar-practice approach (Stout & Love, 2014). Others place her in the early phases of the women's movement, but she took issue with this idea (Stout & Love, 2014). She believed in a "non-gendered understanding of human beings" (Stout & Love, 2014, p. 11) and stated: "The essence of the woman movement is not that women as women should have the vote, but that women as individuals should have the vote. There is a fundamental distinction here" (Follett, 1998, p. 171).

Based on her work in organizations, she developed a wide-ranging innovative management theory grounded in ideas related to self-governance and democracy. She believed in the importance of community organizing in democracies. She theorized about how groups and individuals could develop based on social interactions to achieve common goals (Hatch, 2018). She believed in organizations as communities.

Although her work was respected and widely acknowledged by government leaders and philosophers during her life (Stout & Love, 2014), it became more marginalized during the years before World War II, and since then her ideas have been frequently ignored in management history texts around the world. Japan recognized her work and initiated a Mary Parker Follett Association in the 1950s (Hatch, 2018), and her work is having a rebirth in some management literature streams relative to leadership (Stout & Love, 2014). Some argued that the reason her work was marginalized at points was because she wasn't an academic or a leader in corporations (Kanter, 1995), while others considered her ideas ahead of their time (Gibson & Deem, 2016). Feminists and others asserted that her work was ignored due to her gender and her perspective on power. In addition, others have asserted that management scholars were not able to understand the basic tenets of the relational process ontology (Morlacchi, 2021; Stout & Love, 2014) that were the foundation of her theory.

Her ideas set the stage and predated the much later work on self-managing teams, nonhierarchical structures, and workplace democracy (Hatch, 2018). "Follett proposed the idea that power is a source of creative energy" (Hatch, 2018, p. 32) and that groups through working together – through integration of interests – could solve conflict through "creative redefining of the problem" (p. 32). Integration was a foundational concept in her administrative theory and one that could be applied in most disciplines, i.e., it's "the doctrine of circular or integrative behavior" (Follett, 1924, p. xv). She also theorized about "power-with" versus power-over. Power-over usually resulted in domination to solve conflict or to compromise, neither of which was optimal. Compromise was a second choice since not all interests were achieved (Hatch, 2018). Follett saw "the central problem of social relations . . . to be the question of power" (Stout & Love,

2014, p. 16). Morlacchi (2021) described Follett's view of the relationship between power-with and diversity: "Power-with is generated through the group process and creative integration. It is the power of the group to bring together diversity, by conflicting yet integrating differences, and to generate new values and solutions that create social change and growth" (p. 7).

Follett believed that workers who had the responsibility to carry out tasks should also be part of creating the parameters of the work. This in part came from her views about experts and expertise that were grounded in the idea that expertise comes in large part from doing tasks or from experience. She also advocated that experts or expert knowledge are often used for control. She believed that knowledge or facts changed or evolved over time. They were not static (Stout & Love, 2014).

Stout and Love (2014) summarized key aspects of her administrative theory, particularly in relationship to leadership and expertise:

> The organizing style employs the form of true democracy – integrating federations of small groups – wherein participants are enabled to pursue coordinated activity with emergent and dynamic leadership based on the needs of the situation and the capacities of those involved. Thus, anyone can be a leader and an expert, and in this sense everyone is an administrator. (p. 16)

Some of Follett's most significant works include the texts *The New State: Group Organization the Solution of Popular Government* and *Creative Experience*, as well as collections of papers such as *Dynamic Administration* and *Freedom & Co-ordination*.

Lillian Gilbreth. Gilbreth's work was published about a decade after Follett's contributions. Lillian Gilbreth (1878–1972) conducted work with organizations during the scientific management era and contributed to management theory during that era. Her work foreshadowed the human relations movement in that she focused more on the human influences in the famous motion and efficiency studies that she conducted with a team that included her husband, Frank Gilbreth (Gibson & Deem, 2016).

Dr. Gilbreth was awarded a Ph.D. in psychology from Brown University, and her dissertation reflected her interest in applying psychology to industry (Gibson & Deem, 2016). Following the death of her husband, she continued her consulting work with organizations related to efficiency studies, job task analyses, and some market research related to female customers (Gibson & Deem, 2016). Her work focused on the human factors and engineering. She had faculty positions at Purdue and Newark College of Engineering, was a member of the Society of Industrial Engineers, had an honorary degree in engineering from the University of Michigan (Gibson & Deem, 2016), and was a member of advisory committees for many U.S. presidents including Hoover, Roosevelt, Truman, Eisenhower, Kennedy, and Johnson (Gilbreth, 1970).

In addition, Dr. Gilbreth is acknowledged for her work with organizations. She is also credited with bringing scientific management and efficiency principles to housework. She educated women regarding how to evaluate products they were buying for the household and also proposed that companies should be informed by women's preferences as they create and market products (Gibson & Deem, 2016).

Dr. Gilbreth and her husband, Frank, are also credited with improving the vocational rehabilitation opportunities for people with disabilities. Following World War I, they were touched and dismayed by the more than 13 million injured war veterans in Europe and the United States and realized the challenges they would face in obtaining employment. They used their motion study principles to help people with disabilities work more effectively as well as engage in life activities (Gotcher, 1992; Miller & Lemons, 1998, p. 7). They advocated for adapting the job and the tasks to the employee and for engineering adaptations as needed (Gotcher, 1992).

Japan

Expanding our understanding of historical case studies during the aftermath of World War II, it can be useful to consider Japan. During this period of reconstruction, we notice a similar approach to management history – namely, that the shift from "business history" to more theoretically oriented "management history" and "organizational history" was motivated by the practical potential of lessons learned. As with pre-war American literature in this nascent field, theory was generated out of necessity, as generally applicable lessons were derived from multiple historical case studies. Most of these publications from the 1950s and 1960s focus on the *zaibatsu*, Japan's politically influential business conglomerates that emerged in the late 19th century after the Meiji Restoration.

For example, Kimura Takeshi's 人物財閥史 ("Jinbutsu zaibatsu shi," *A History of Zaibatsu Personnel*) (1956) investigated the organizational development of the conglomerates Mitsui, Sumitomo, and Mitsubishi. A classic text of business history, it focused on organizational structures and personnel models, providing insight into the socioeconomic transformation of Japanese society in the first half of the 20th century. Currently, the book is classified under different categories by different universities and business schools in Japan, namely as "Japanese history," "economic history," and "business management history."

Another publication, Noguchi Tasuku's (1960) *History of Capitalist Management in Prewar Japan*, focused on the *zaibatsu* as well, especially Mitsubishi, but adopted a different focus. It weaved together a history of labor management in the manufacturing industries in post-Meiji Japan, exploring the effects of industry on the workforce, labor conditions and relations, and analyses of wage statistics from the Meiji to the Taisho periods (i.e., 1868–1926). Noguchi's analysis of the monopoly of influential business conglomerates like Mitsubishi revealed a social critique of oppressive practices. In later publications, Noguchi maintained an interest in the manufacturing industries, especially labor management strategies in this sector.

In addition to the lessons-learned approach, both Kimura and Noguchi presented a sociopolitical analysis of Japan's businesses and economy; other scholars, too, have been proponents of this approach in postwar Japan, focusing on a wide range of historical cases, domestic as well as international. For example, Masataka (1966)

explored a chapter in Chinese business and management history, namely the Zhejiang financial clique, known in Japanese as *Sekko zaibatsu*, which was influential in Shanghai finance from the late 1920s through the 1930s. In *China and the West, 1858–1861: The Origins of the Tsungli Yamen,* Banno (1964) adopted a more squarely sociopolitical history perspective to shed light on China's emergence on the political and economic world scene. To that end, he focused on the organization and functions of imperial China's Office of Foreign Policy *(Zongli Yamen),* weaving an intricate tapestry of the ideas and activities that led to its formation, activity, and results. Banno used this incremental and process-oriented approach in his later articles on the history of Shanghai finance, focusing on networks of influence and slow societal changes instead of focusing on major events and broad-stroked contexts.

Similar to Kimura, Noguchi, and Banno is the contemporaneous *Strategy and Structure: Chapters in the History of the American Industrial Enterprise* by Chandler (1962). Reviewing 70 of the largest American corporations at the time, Chandler focused on the administrative strategies that these companies employed as they expanded and changed over decades of growth. In particular, he analyzed the decentralized corporate model of four companies (du Pont, General Motors, Standard Oil, and Sears).

The literature mentioned here – from Levasseur and Folts to Noguchi and Chandler – illustrates a double focus in early organizational and management history scholarship, namely on (1) lessons learned and practical applications and (2) socioeconomic critique (i.e., the relationships among society, economy, institutions and for-profit organizations, and politics). Both approaches encouraged extrapolations from historical case studies, leading to theorization that permeated related fields such as economics and sociology. This historiography helps illuminate the connection to a major foundational framework for organizational and management history, namely "history as context."

History as context

History is central to many foundational OMS theories, from Chandler's work as described above to institutional theory and path dependency (Wadhwani et al., 2018). The influential work of DiMaggio and Powell (1983) is premised on the epistemological role of historical context and the value of history as context for present-day empirical research and theorization. They defined organizational change as a "change in formal structure, organizational culture, and goals, program, or mission" (p. 149). For DiMaggio and Powell (1983), the state and the professions "have become the great rationalizers of the second half of the twentieth century" (p. 147). In that context, they see bureaucratization as a cause of structural change in organizations. According to DiMaggio (1997), culture and history play active roles in the present as they accumulate in memory, affecting both individual and institutional agency.

Memory as knowledge

There is limited reference to organizational memory by scholars of organizational and management history, particularly in descriptions or accounts of the historic turn in organizational studies. When memory is referenced, it usually draws from the literature on collective memory (Casey, 1997, 2019), collective remembering/re-membering (Foster et al., 2020) and frequently focuses on power (Anteby & Molnar, 2012) and the strategic use of memory (Suddaby, 2010).

Yet organizational memory has been widely referenced in organizational studies since Walsh and Ungson's (1991) review and exploration of the concept. Despite the extensive interest in organizational memory in organizational studies and practice-related literature, it is an undertheorized and underresearched concept (Anderson & Sun, 2010; Casey & Olivera, 2003, 2007; Foroughi et al., 2020), with the most robust work in the field of organizational learning (Argote, 2013; Argote & Miron-Spektor, 2011; Huber, 1991; Schwandt, 1997) and knowledge management (Anderson & Sun, 2010; Casey, 2019; Casey & Olivera, 2003, 2007).

This section first describes how organizational memory has been defined since the concept was proposed by Walsh and Ungson (1991) and then analyzes how the concept has been conceptualized and researched in relationship to organizational learning. This section also references when history is highlighted in the literature on organizational memory. The section concludes with a brief discussion of collective memory and social remembering in organizational studies that preceded the turn toward history in organizational studies.

Organizational memory

Walsh and Ungson (1991) articulated the risks involved in theorizing about organizational memory. One such risk is anthropomorphism since the term *memory* is drawn from psychology and there is a tendency to overgeneralize knowledge of individual memory to the collective. They noted some of the earlier references to organizational memory, including those of Weick (1979), Douglas (1986), and March and Simon (1958). Walsh and Ungson articulated their assumptions about organizations in their theorizing about organizational memory, including that organizations are information processing and interpretive systems. In defining organizational memory, Walsh and Ungson (1991) referenced history, specifically that organizational memory is "stored information from an organization's history that can be brought to bear on present decisions" (p. 61). They proposed acquisition and retention as the two key memory processes, suggested five storage bins – individuals, culture, transformations, structures, and ecology – and highlighting the importance of external archives.

Although history is a part of the definition of organizational memory, Walsh and Ungson (1991) did not define history, nor did they offer a theoretical discussion or exploration of the construct. History is not directly theorized but is referenced in

considering the conflicting role and utility of memory. They asserted that memory is problematic in that it may constrain decisions; yet if history is not recalled, mistakes may be repeated. History is noted in relationship to stories and sagas yet is not directly discussed nor theorized in this definition or in the bins, including the discussion of the archives. "The content of an organization's history that is retained in transformations, structures, and ecology is very difficult to decipher and not prone to effortful retrieval" (Walsh & Ungson, 1991, p. 70).

Walsh and Ungson (1991) offered seven propositions for future research on organizational memory, with only one proposition referencing organizational history – i.e., an organization's decisions may be more readily accepted if framed in the context of the history of the organization. They proposed three research phases for future study of organizational memory but did not incorporate history in that discussion.

More recent literature reviews on organizational memory include two reviews of the concept and a recent review that focused on organizational memory studies. History, as a concept, was not explored in either Anderson and Sun's (2010) review or Casey and Olivera's (2003, 2007) reviews, and neither group of authors defined organizational memory in terms of knowledge or history. Foroughi et al. (2020), in their review of the field or organizational memory studies, noted the "ambiguous usage of memory as either knowledge (e.g. de Holan & Philips, 2004) or history (e.g. Ravasi et al. 2019)" (p. 1726) and further differentiated the field by defining OMS "as an inquiry into the varieties of ways that organizations and organizing processes shape, and are shaped by, remembering and forgetting" (p. 1726). They explored the different perspectives on memory in contrast to history in organizational studies and asserted that "history and memory may afford different uses in organizations. To the extent that they are distinct ways of reconstructing and re-presenting the past, they may converge, conflict, and coexist, but they may also transform into one another" (Foroughi et al., 2020, p. 1730).

The role of memory in organizational learning

Organizational memory has been a core concept in organizational learning (Casey, 1997; Fear, 2014), knowledge creation, and knowledge management. The theory and research on these constructs have enriched our understanding of organizational memory. In organizational learning, scholars have theorized that organizational memory is a critical component of the process of organizational learning (Argote, 2013; Argote & Miron-Spektor, 2011; Huber, 1991; Schwandt & Marquardt, 2000) and offered perspectives on the role of memory and, at times, history in the organizational learning process. This section frames some of the themes relevant to organizational memory in the context of organizational learning.

Many of the early organizational learning concepts and related theories and models drew from theories of individual learning and primarily referenced learning in terms of changes in cognition and behavior (Schwandt & Marquardt, 2000).

March and Olsen (1975) and Argyris and Schon (1978) began to create the bridge between individual and organizational actions in relationship to learning. Shrivastava (1983) and others contributed to descriptive models of organizational learning, which set the stage for theorizing organizational learning as a "complex social phenomenon" that differentiates learning as changes in either cognition or behavior (Fiol & Lyles, 1985; Huber, 1991; Schwandt & Marquardt, 2000) and theorizing about the relationship to the internal and external environments (Hedberg, 1981) and other variables such as culture and memory (Casey, 1997).

Schwandt's (1993, 1997) model of organizational learning is grounded in sociology and Parsons' (1951) social action theory. The model assumes that change is created through the interaction of performance and learning processes, yet changes in the "social system itself occur through the learning process and are related to the latent pattern maintenance function of the system" (Schwandt & Marquardt, 2000, pp. 42–43), which has memory as its foundation. Organizational learning is defined as "a system of actions, actors, symbols, and processes that enables an organization to transform information into valued knowledge, which in turn increases its long run adaptive capacity" (Schwandt, 1993, p. 8). This model of organizational learning considers "organizations as collective representations which are characterized by mutually dependent actions," which can then be described as "functioning through the concept of interrelated systems of actions emanating from the individual, group and organizational levels" (Schwandt & Marquardt, 2000, p. 44). "The primary purpose of the systems of actions in a collective is to provide the means through which the collective is able to survive in its changing environments" (Schwandt & Marquardt, 2000, p. 44).

The organizational learning systems model (Schwandt, 1993, 1997; Schwandt & Marquardt, 2000) assumes that learning is a nonlinear, dynamic process of interdependent actions. The change in the social system is a function of both learning and performance. The learning system extends Parsons' general theory of action and is composed of four subsystems: environmental interface, representing the adaptation function; action/reflection, representing the goal attainment function; dissemination and diffusion, representing the integration function; and meaning and memory, representing the pattern maintenance function. All four subsystems provide the functional prerequisites for learning. The subsystems are interconnected through the interchange media provided and exchanged by each subsystem: environmental interface provides information to the system, action/reflection provides goal-referenced knowledge, dissemination and diffusion provides structuring, and meaning and memory provides sensemaking.

The meaning and memory subsystem is the foundation for the other subsystems and for organizational learning, as it provides guidance based on the "valued" or goal-referenced knowledge developed by the learning system and stored. Initially, the theory and research on this subsystem focused on memory as stored knowledge available to the organization. Research on the memory and learning in

this model (Casey, 1997; Schwandt & Marquardt, 2000) has focused on memory as a process at the individual, group, and organizational level and has been guided by the sociological work on collective memory. Theories of collective memory (Halbwachs, 1950/1980; Schwartz, 2000, 2005) suggest that commemoration and history are the two core processes in collective memory.

Huber (1991) defined organizational learning by explaining that "an entity learns if, through its processing of information, the range of its potential behaviors is changed" (p. 89). Huber (1991) proposed a detailed framework to inform our understanding of organizational learning and in doing so identified four core concepts and processes: knowledge acquisition, information distribution, information interpretation, and organizational memory (p. 90). Organizational memory is "the means by which knowledge is stored for future use" (p. 90). Some of the issues that affect organizational memory are employee attrition and ineffective knowledge management processes and structures. Memory is essential to organizational learning because it demonstrates that learning occurred through the storage and retrieval of outcomes of learning. History is not directly referenced in Huber's theorizing about the role of memory in learning.

Argote and Miron-Spektor (2011) acknowledged that most scholars define "organizational learning as a change in the organization's knowledge that occurs as a function of experience (e.g., Fiol and Lyles, 1985)" (p. 1124) and that this knowledge is stored in different types of repositories at different levels of analysis, from individuals to transactive memory systems or organizational routines. To facilitate organizational learning, individual knowledge needs to be embedded in a "supraindividual repository" (Argote & Miron-Spektor, 2011, p. 1126). Organizational memory is theorized as "being embedded in organizational members, tools, and tasks and the networks formed by crossing members, tools and tasks" (Argote & Miron-Spektor, 2011, p. 1130). Argote and Miron-Spektor (2011) also acknowledged the challenges in defining organizational knowledge, as it can be processes, stock, tacit, or explicit. In this article theorizing organizational learning and the role of memory, they did not reference history.

In defining organizational memory as a "supraindividual repository" (Argote, 2013, p. 1126) – either a structure or process of knowledge – there are challenges with each of these repositories or components of the organization in terms of creating, transferring, and further embedding knowledge in memory systems (Argote, 2013). Argote (2013) explored empirical studies of organizational memory from this perspective, primarily drawing from studies in the manufacturing and service industries (p. 85). This work was based on the assumption that creating knowledge through experience and storing it in repositories such as routines, technology, structures, and policies and procedures has the potential to lead to organizational productivity and effectiveness. Fewer studies have explored the impact of these repositories on memory, describing how it is used and its relationship to effectiveness (Argote, 2013).

A more recent review of the major studies in organizational learning (Argote et al., 2020) did not reference history directly. Organizational memory was referenced as part of the context that influences organizational learning and was once again referenced as a repository for organizational knowledge, in particular most frequently as a routine or a transactive memory system (Argote et al., 2020, p. 4). Transactive memory systems are essentially stored knowledge of "who knows what and who is best at what" (p. 5) and are linked to organizational learning, performance, and effectiveness. Argote et al. (2020) included organizational memory among promising areas for future research, in particular how power or hierarchy may influence what is remembered or stored in organizations (p. 16).

The key questions and debates framed in Walsh and Ungson's (1991) early work on organizational memory, and to a lesser degree, history, remain throughout the literature: in particular, whether memory and history are helpful or harmful to organizations. The question may be reframed in relationship to organizational and other forms of collective learning: Does organizational memory or history as a form of stored knowledge from the past facilitate and enhance organizational learning or does it serve as a barrier to collective learning? (Argote et al., 2020; Jain, 2020). Jain's careful analysis of the theory and research on organizational memory and learning, with organizational memory defined as "stored information from an organization's history" (p. 25), provides a cautionary answer to this question. Jain hypothesized two scenarios grounded in the relationships between memory and performance and time. Scenario 1 supports the importance of memory for becoming more productive, obtaining resources, and planning and investing in the future. Yet Jain also asserted that memory and these related organizational actions could lead to inertia or resistance to change. Scenario 2 theorizes that without memory, an organization will have low productivity and difficulty in obtaining resources and therefore may not be successful in the immediate future (p. 27). Overall, "memory is a strictly dominant strategy to not having it, and it is a useful capability for organizations" (p. 27).

Although organizational memory is defined and theorized in the context of history and its relationship to organizational learning, history itself as a construct is not defined, nor does this literature reference theoretical and empirical work on history or social remembering. The organizational memory research in relationship to learning for the most part does not discuss the theoretical foundation for terms such as history or the past and in doing so loses the power of these theories to further explicate organizational memory and its structure and function in organizations and its relationship to performance and effectiveness. Similar to many theories and studies of organizations, which draw from the fields of psychology and sociology (Schwandt & Marquardt, 2000) and to some degree the integration of psychology and sociology in the work of Katz and Kahn (1978) and Weick (1979), the theoretical foundation for most definitions of organizational memory and its role in performance also draws from psychology, i.e., Thorndike and Tulving (Jain, 2020). To a lesser degree, sociologists such as Durkheim

and Halbwachs could provide strong theoretical grounding for memory, history, and learning at the collective level.

History vs. the historic turn

This section provides an overview of the traces of the emergence of history as a concept and as a discipline in organizational and management studies and examines how these traces have served as a foundation for what is referred to as the historic turn in organizational studies. This overview joins that of others who have recently offered their accounts (Bruce, 2020; Mills & Novicevic, 2020). We drew from their work as well as that of others, as cited in this overview. In addition, this overview offers recent accounts of what is referred to as the historic turn in the discourse in the humanities and other social sciences.

Although a historical lens has been adopted for centuries, in multiple cultures, and in a variety of fields in the humanities, the more recent history of literature in the humanities saw a "historic turn" in the 1990s. This phenomenon is discernible as such because this renewed interest in history and its methods permeated several humanities disciplines – philosophy, literary theory, anthropology, and history itself – around the same time, also leading to quasi-contemporaneous efforts to understand this historic turn comparatively across these disciplines (McDonald, 1996). At the intersection of anthropology and history, the historic turn entailed a new emphasis on shedding light on historical social experience, through a hybrid approach (historical anthropology or anthropological history) that recognized the historicity of cultural forms and categories and the history of anthropology itself, especially its colonial roots (Dirks, 1996). In literary theory, the historic turn has contributed to deemphasizing aesthetic analyses of literary texts and a teleological view of literature in favor of a focus on understanding literary writing as a cultural practice, embedding literary texts in their cultural contexts, and seeing the content of literature as reflective of such contexts (Mullaney, 1996). In analytic philosophy, scholars turned their attention to the history of the field, the historical sociocultural contexts in which philosophers thought and wrote their works, and the implications of this metahistorical approach to analytic philosophy for the central themes of the discipline, from logic to epistemology (Reck, 2013). In the field of history itself, the historic turn followed the "linguistic turn," replacing a focus on Saussurian semiotics with one on situational semantics (Jones, 2005; Lepetit, 1995). The historic turn of history grapples with central questions of agency, specifically agentic forces that shaped the past as we know it and agentic forces that shape historical writing; experience, especially the lived social experience and the extent to which history can shine a light on historical lived experiences; and the subject, particularly calling into question the singularity of the self and the monolithic nature of subjects, (re-)integrating them into discontinuous or otherwise complex networks (Spiegel, 2005).

In the social sciences, the historic turn is more broadly defined as

> a change in emphasis in the discourse of the humanities and social sciences reflecting a recognition (beyond the academic bounds of history itself) of the importance of historical context and historical processes. This has included the new historicism in literary theory, ethnohistory, and historical sociology. One of several turning points identified in the evolution of these disciplinary discourses; it is seen as having followed the rhetorical turn.
>
> (Oxford Reference, n.d., para. 1)

In framing the debates relative to the historical approach and the past in OMS, Mills and Novicevic (2020) highlighted the generally ahistorical approach taken in OMS as well as the atheoretical approach in many studies in management, organization, and business history. They proposed that different ontological and epistemological perspectives that often serve as the foundation for the philosophical and theoretical positions to develop organizational and management history are influenced by social, human, location, and time factors present when they are created. Many of the early choices for the focus in the histories or what to include in the histories are grounded in early management views, leading to the ongoing emphasis on masculinist, managerialist, and colonialist concerns (Mills & Novicevic, 2020, p. 23).

Most organizational studies scholars would acknowledge the beginning of the turn toward history in OMS in the 1990s and the early 21st century (Mills & Novicevic, 2020, p. 26), and they largely credit Clark and Rowlinson (2004) for explicitly noting it while at the same time highlighting calls prior to their own.

The 1990s: Precursors to the historic turn in organizational studies

This section highlights some of the key debates in the organizational studies literature regarding whether or how history could enhance OMS theory and research. This section focuses on three articles referenced as precursors to the "historic turn" in OMS and presents some of the core debates and ideas from that period.

Kieser (1994)

Kieser (1994) is an early reference point for advocating for the value of historical analyses in organizational studies. In response to an invitation by Arie Lewin in the early 1990s to submit a paper to a then new journal, *Organization Science*, Kieser provided a thoughtful analysis of how historical analysis could be incorporated into theorizing and research in organizational studies. Lewin then invited Paul Goldman (1994) to respond to Kieser's paper.

In this paper, Kieser (1994) asserted that the "excursions of organizational researchers into history have become extremely rare" (p. 609). He argued that one reason was the research methods that were developing and used in organizational studies at that time. He offered four recommendations to encourage the use of historical analysis

to strengthen research in organizational studies and highlighted the potential points of disagreement and how to resolve the tensions. His recommendations elaborated on how historical dimensions could further our understanding of culture, explaining that we could better identify and clarify the ideologies that underlie the selection of organizational events or problems and potential solutions through comparison with past developments in organizations.

Kieser (1994) reflected on the differences between organizational theory and history, in that historians are reluctant to develop and accept grand theories and emphasize the uniqueness of organizations, while organizational theorists are interested in the dimensions of organizations that can be generalized to explain the effectiveness of organizational actions. He also acknowledged the researcher's selection bias regarding which events and organizations to study and the researcher's interpretation of events (p. 619). In summary, Kieser offered:

> Therefore, historical analyses can only serve to reflect on existing organizational designs and to criticize existing organization theories. Historical analyses do not replace existing organization theory; they enrich our understanding of present-day organizations by reconstructing the human acts which created them in the course of history and by urging organization theories to stand the test of a confrontation with historical developments. (p. 619)

Goldman (1994)

In his response to Kieser's perspective, Goldman (1994) agreed that the use of history in organizational studies is increasingly rare but offered counter explanations. He noted: "Because I share Kieser's view that historical and cross-cultural issues do not now drive the field, I take his essay as a point of departure for exploring how and why our field has evolved in a fashion that discounts the past" (p. 621).

Goldman agreed with Kieser that researcher bias is always present. "We will inevitably be prisoners of our time, subject not just to its fads, but to its larger spirit as well"; he further asserted that "organizational researchers and theorists, pragmatists that we are, may be quintessential creatures of the present" (p. 621). Yet he was less optimistic that the power of historical analyses could "truly free us from ideology" (p. 621). He proposed that organization studies is a "utilitarian science" and that theorists and researchers acknowledge their limitations and prefer "a more modest, utilitarian and middle-range approach, one that may actually defeat theory" (p. 622). He also asserted that management theorists need to focus on practice and be able to converse with managers and practitioners, and history does not lend itself to that discussion.

Goldman concluded: "Kieser's article is less useful as an exhortation to use history in organizational theory than as a remainder of our modest, but still useful, collective endeavor" (p. 623).

Zald (1993, 1996)

Zald's work in the mid-1990s is also acknowledged as a precursor discussion to the historic turn, with his advocacy for the contributions of history to organization studies. Overall, Zald (1993) argued for an enlightenment model of the social sciences, with the goal of "education for public and civic participation, not necessarily for specific problem solving. An enlightenment model suggests an educative and autonomous role for organizational studies" (p. 514). He identified organization studies as one discipline in the social sciences through the incorporation of some philosophical ideas and methods from the humanities. In describing the social sciences, he asserted, "In the rush to be scientists, scholars have been overly detached from the philosophical, philological, historical and hermeneutic traditions" (p. 514). He recognized that organization studies is an applied discipline with an audience that extends beyond academic theory and research to those who work in organizations and are concerned with effectiveness and productivity. Zald acknowledged the differences between the humanities and social sciences like organizational studies, including the underlying philosophical assumptions and related goals and methods. Yet, organization studies can draw from common roots, and humanities – in particular history – has much to offer. He identified the core disciplines of the humanities as "philosophy, literature and languages, art history (fine arts) and history" (p. 517).

Zald (1993) identified some areas from the humanities that have emerged in organizational research, including semiotics and rhetorical analysis, and carefully articulated several recommendations on how organizational studies could build from these examples. The recommendations focused on history as a tool rather than a theoretical perspective. Most of Zald's recommendations for how history could inform organizational studies focused on analysis through in-depth description versus generalizations and careful reading and interpretation of texts with semiotics and rhetorical analysis. He added that "if they appear useful, we can also draw on methods from outside the behavioral sciences. In recent years, the social sciences have taken a linguistic, literary and historic turn that inevitably draws on traditions and methods developed from the humanities" (Zald, 1996, p. 252). He noted that, at that time, there had been little recognition of historiography or historical methods in organizational studies (p. 256) and referenced the value of metahistory. He elaborated on the value of history to organizational studies research, in that organizations both exist in history and have their own histories (p. 257), and their histories and strategies are shaped by the context in which they work (p. 257).

1990s: Pointing the way from before and beyond

In a brief analysis of the citations for Kieser, Goldman, and Zald, it appears that these papers were not heavily cited until after Clark and Rowlinson's (2004) work, which many cite as the beginning of the historic turn in OMS. For example, as of August 2021,

Kieser's (1994) article has been cited more than 600 times, yet it was cited less than 70 times prior to Clark and Rowlinson (2004). More than one-third of the 600-plus citations for these articles were between 2017 and 2021. Clark and Rowlinson (2004) acknowledged the significance of the work of these authors and how it has contributed to thinking about history in relationship to OMS. Although both Kieser and Goldman defended the importance of history or at a minimum historical analyses in organizational studies, Goldman in particular acknowledged that the foundational assumptions of the two disciplines were fundamentally different, as well as the outcomes sought. Definitions of history and the past were not offered in either Kieser's or Zald's articles. In addition to referring to those two articles, Clark and Rowlinson (2004) carefully highlighted and analyzed the contributions of two additional prior publications, which they asserted were precursors to this historic turn, i.e., Jacques (1996) and Burrell (1997).

Clark and Rowlinson (2004) and the beginning of the historic turn in organizational studies

The article by Clark and Rowlinson (2004) is frequently referenced as the beginning of the "historic turn" in OMS (Bruce, 2020). Their article was significant in capturing the early threads of the value of history in OMS and acknowledging that these threads served as fertile ground for their work and that of others as the historic turn emerged in the early 2000s. In this article, they carefully analyzed the key publications in organizational studies that preceded their 2004 article. They discussed both the contributions as well as the issues with this work. Their goals were introduced as "to assess the major research programmes in organisation studies in relation to the 'historic turn' that has transformed the way other branches of the social sciences and humanities 'go about their business'" (p. 331). This comparison between organizational studies and other social sciences and the humanities is a critical contribution, in that it acknowledged and interpreted what had occurred in organizational studies with regard to the use of history to that point in time and the challenges they saw in this "turn" in the field moving forward.

Clark and Rowlinson (2004) offered three views that represent how a historic turn in organizational studies could be transformational. "First, it would represent a turn against the view that organisation studies should constitute a branch of the science of society" (p. 331). They compared this to the linguistic turn in history, where the basic questions changed and there was a "general displacement of 'the Scientific Attitude' by the 'Rhetorical Attitude'" (p. 331). Their second point references how a historic turn would usher in debates on an ambiguous path, but the movement would not move "necessarily towards the most adjacent branch of history, which in the case of organisation studies would be business history" (p. 331). Lastly, they suggested that a turn toward history "would entail a turn to historiographical debates and historical theories

of interpretation that recognise the inherent ambiguity of the term 'history' itself" (p. 331), requiring "greater reflection on the place of historical narrative in organisation studies" (p. 331).

Clark and Rowlinson (2004) acknowledged that some work in organizational studies has used history in theorizing and research, such as institutional theory, culture, and path dependence theories, yet they questioned how history was defined and used in this work. "It is from this sceptical standpoint that we intend to review the treatment of history in the major discourses of organisational economics, organisational sociology and organisational culture" (p. 332). They further noted that whether or not Zald, Kieser, and others "would associate themselves with a historic turn, each of them has identified particular problems in the prevailing approaches to history in organisation studies which set the scene for our review" (p. 332).

In addition, Clark and Rowlinson (2004) speculated that many scholars would attribute this work to critical management studies, particularly Burrell (1997) and Jacques (1996), but they believed that the ideas offered in this earlier work offered more than a critical perspective. They ventured that a true historic turn would consider diverse theories grounded in varied paradigms and political considerations.

In their thoughtful analysis of the four publications and their contributions, Clark and Rowlinson (2004) frequently referenced issues related to methods and data. For example, they highlighted the issues with structural contingency theory, which favors more cross-sectional designs with large numbers of organizations over longitudinal case studies. "The time frame in longitudinal research is usually only a time-line and presumes a simple account of history" (p. 342). "Historical time, as opposed to a time-line, is uneven and punctured by events, whereas time is smoothed in longitudinal studies" (p. 342).

They concluded that the call for including more history into organizational studies to sustain a historic turn would need to further question "the scientistic rhetoric of organisation studies, an approach to the past as process and context, and not merely as a variable, and an engagement with historiographical debates, especially regarding the epistemological status of narrative" (p. 346). They also predicted that there was and would most likely be resistance to this future. "By contrast, we contend that a historic turn opens the way for diverse forms of theoretically informed historical writing in organisation studies" (p. 347).

Clark and Rowlinson (2004) epilogue

In 2006, Booth and Rowlinson created the *Journal of Management and Organization History* in part to establish organizational history as a distinct field (Mills & Novicevic, 2020, p. 52) and developed a 10-point agenda for the field. They asserted, in part, that the "historical turn" would be more inclusive of "more critical and ethical reflection" and highlighted areas such as "race, gender, sexuality, and post-colonial theory"

(Mills & Novicevic, 2020, p. 53) using different epistemologies and ontologies and resulting methodologies. They further asserted the significant issues with management history that primarily focuses on the histories of firms and management practices, which further embed ideologies like capitalism without questioning the assumptions and sources of power and knowledge (Mills & Novicevic, 2020).

Traces of the historic turn in the 1990s and early 2000s

Although the most frequently acknowledged precursors to the historic turn in organizational studies are Kieser (1994), including Goldman's (1994) response, and Zald (1996), other traces to history in OMS surfaced, particularly in relationship to organizational memory in the 1990s and early 2000s. For example, Walsh and Ungson's (1991) seminal article exploring organizational memory also referenced history, i.e., organizational memory is "stored information from an organization's history that can be brought to bear on present decisions" (p. 61). In this definition, history is a type of information or knowledge that exists and can be used to facilitate the work of the organization. Walsh and Ungson did not clarify or further theorize history, nor did they draw on the theoretical work from related disciplines to define it and its relationship to organizational memory.

Casey (1997) researched organizational memory in a multisite organization drawing on the robust sociological work on collective memory (Halbwachs, 1950/1980; Schwartz, 1991a, 1991b). Her findings included shared interpretation of significant events in the organization's history and their relationship to organizational identity. The theoretical foundation for her study was Schwartz's theory of collective memory, which included two components: history and commemoration. She did not theorize regarding history specifically beyond Schwartz. Later, Nissley and Casey (2002) further theorized about collective memory in the context of corporate museums and the role of power in relationship to what past events are remembered and how they are recalled. In addition, they differentiated between cultural memory (Sturken, 1997), i.e., "memory that is prompted by cultural artefacts but socially negotiated" (Nissley & Casey, 2002, p. S39), and history, i.e., "narrative that has been sanctioned by institutional frameworks" (Nissley & Casey, 2002, p. S39). Memory is connected to social processes, while history is closer to a "representation of the past" (Katriel, 1994, p. 2).

Reflecting on the historic turn through the next decade

In addition to new journals dedicated to organization and management history, which helped to establish the historic turn set by Clark and Rowlinson (2004), in the decade after this work there were many special issues in OMS journals that focused on history and memory in organizational studies. This section reviews five key

special issues that highlighted significant components of the historic turn. Two special issues of *Organization* focused on memory, including social memory, organizational memory, and commemoration, as well as how historical methods could be integrated to further research in these areas. The conceptual papers and empirical research surfaced key ideas related to how power influenced memory practices such as commemoration and forgetting. The special issues in the *Academy of Management Review* explored how history as a discipline as well as research methods from history such as historiography were being incorporated into organizational studies, noting both the challenges and the issues in doing so.

Similar to Clark and Rowlinson (2004) and others (Booth & Rowlinson, 2006; Kipping & Üsdiken, 2014; Usdiken & Kieser, 2004), the 2016 special issue of the *Academy of Management Review* explored the similarities and differences of the disciplines and the major themes that had surfaced during the decade after the emergence of the "historic turn" and offered their perspective on the future. They differentiated organizational history studies from business and management history, indicating that the latter were subdisciplines in the broader field.

In a fifth special issue, Mills et al. (2016) in *Management and Organizational History* introduced the issue by calling into question the "historic turn":

> The call for 'an historic turn' in Management and Organization Studies (MOS) (Clark & Rowlinson, 2004; Kieser, 1994; Zald, 1993) is perhaps mislabeled and very much depends on what is seen as history and what is seen as constituting MOS. There are at least three alternative characterizations; first, a historic *return* to MOS; second, *rethinking MOS* from an historiographic perspective; and third, critically interrogating MOS and its relationship to history and the past.   (p. 67)

As they noted at the conclusion of the introduction to the special issue, "At best, we hoped to find the influence of Booth and Rowlinson's (2006) call for theoretically and methodologically rich and varied approaches to history – and that is exactly what we found, with implications for future directions" (p. 71).

In reflecting on how history is present and the degree to which it is present in organizational studies, Mills et al. (2016) noted its influence in neoinstitutional theory as well as path-goal theory and other paradigms related to feminism, poststructuralism, and postcolonialism. They asserted that it was fairly common to see references to history in organizational studies and management textbooks prior to the 1980s (p. 68). They continued by reviewing the central points in the debate between Kieser and Goldman in the 1990s and captured the major issue:

> Right at the crux of this early call of an 'historic turn' in MOS, we find that any attempt at integration or reintegration falters on agreement about the nature of the disciplines or foci in question. This leads us to question what 'turn' was being called for and in what field of enquiry?   (p. 69)

Mills et al. (2016) furthered this discussion with a review of the major points raised by Clark and Rowlinson (2004) and then the evolution of Rowlinson's (2004) ideas, which provide

a critical reappraisal of both history and MOS. Indeed, that same year Rowlinson (2004) moved the argument further towards a critical reappraisal of both history and mainstream MOS in his outline of three historical perspectives in organization studies – factual, narrative, and archaeo-genealogical. In the article Rowlinson explores not only what he sees as three important approaches to history but also their fit with different approaches to MOS – especially the "archaeo-genealogical approach," which, drawing largely on the work of Foucault (1972, 1979), complements postmodernist organizational analysis in terms of worldview, methodology and a profound interest in history. (p. 69)

They also raised challenges in OMS related to presentism and universalism, which were identified by Booth and Rowlinson (2006), and advocated for OMS truly engaging with historical theories. They asserted that the majority of the work at this point in OMS was closely linked to the critical management paradigm. Mills et al.'s (2016) critique is that this also represented "a half step back": "It is a continued privileging of history over OMS, especially in the claim that 'the "historic turn" . . . is arguably taking place *in* management and organization theory' and that this is the 'starting point' of their argument" (p. 69).

In their reflections on the decade following Clark and Rowlinson's (2004) article, Mills et al. (2016) referenced promising new perspectives relative to the intersections of organizational studies and history, with a discussion of ANTi-history (Durepos & Mills, 2012; Mills et al., 2016) and rhetorical history (Suddaby et al., 2010) as well as others. (See later section in this chapter for additional discussion of ANTi-history and rhetorical history.)

Beyond the decade after Clark and Rowlinson: Debates on the historic turn

Beyond the decade after Clark and Rowlinson (2004), the theoretical work and empirical studies related to the "historic turn" continued, along with significant debates in OMS on the role of history and historical research methods in OMS and the meaning and value of this work in the field. The theoretical work on new approaches to history in OMS and related empirical studies have brought more depth to understanding the plurality of perspectives, along with heated debates relative to the value of the perspectives and research methods. This work has surfaced in special issues such as *Journal of Management History* (2019, 2020, 2021) as well as books (Bruce, 2020; Cummings et al., 2017; Mills & Novicevic, 2020) and edited books (Maclean, Clegg, et al., 2021) that emerged from conferences such as EGOS.

Special issues

As editors of the special issue of the *Journal of Management History*, Lent and Durepos (2019) stated that the purpose of the issue was to "explore the turn in management and organization studies (MOS) and reflect on 'history as theory' versus 'history as method'" (p. 429). They asserted that the papers assembled for the issue offered

theoretical contributions to the research methodologies used in historical organizational studies. In reflecting on the value of history to organizational studies, Lent and Durepos (2019) highlighted that history offers the potential to further understand organizational life by providing an alternative to other social science disciplines that are predominant in organizational studies (p. 429). Lent and Durepos (2019) framed the discourse since the historic turn in terms of those who see differences in the basic epistemological assumptions between the disciplines and those who see the potential for theorizing across the disciplines, and the contributions of this theorizing. They maintained that the historic turn has not realized its potential given the relatively minimal use of "quantitative and qualitative historical organizational data that MOS scholars are currently neglecting" (p. 430). "History as method" has made less progress. They acknowledged the work that has addressed some of these issues (Durepos & Mills, 2017; Rowlinson et al., 2014), but there is still much to be done to appreciate the robustness of historical methodologies and integration with and to organizational studies (p. 430).

This special issue addressed this challenge of "enhancing the methodological pluralism of historical organizational studies" (p. 430). Building on Suddaby (2016), Lent and Durepos (2019) suggested that fulfilling the potential of the "historic turn" and its sustainability depends in large part on work to build bridges across these gaps or differences. For a fruitful discussion, this conversation would need to include defining a current theory of history (Lent & Durepos, 2019; Suddaby, 2016). In addition, Lent and Durepos (2019) advocated for the "dual integrity" as proposed by Maclean et al. (2016), in that researchers will need to demonstrate competence in both disciplines, i.e., history and organizational studies (p. 436).

In 2021, Mills and Mills provided a guest editorial as the introduction to the special issue of the *Journal of Management History*. They detailed how and why the special issue was developed.

> We would like to say from the offset that this special issue of the *Journal of Management History (JMH)* is better labeled "Selected Debates in Management and Organization History." As with all accounts of history, our story is the outcome of selected viewpoints and experiences of the past. (p. 1)

They further noted that these debates have called attention to the role of history in organizational studies and a number of the special issues. Yet the impact on organizational studies or change has been questioned, along with whether the debate and the issues have been ignored in more mainstream organizational studies research. They also referenced the intense debates between scholars who represent more positivist perspectives, such as Bowden and others, and those who represent more postmodern or amodern perspectives. Mills and Mills (2021) commented:

> It struck us that a debate was lacking three elements – one: a debate across a particular space (e.g. JMH) where points and counter points can be discussed symmetrically; two: the voices of those who see themselves at the other end of the "historic turn" debate (e.g. postmodernist

MOH scholars); and three: the perspectives of the Other who, until now, have been excluded not simply from the debate but by the debate itself (e.g. postcolonial/decolonial and feminist perspectives). (p. 3)

They constructed a debate along these lines across two journals, *Qualitative Research in Organizations and Management* and the *Journal of Management History,* engaging with Bowden (2019), Mollan (2019), and others. They asked Bowden and Mollan to each choose four papers to submit, and these papers are presented in the 2021 special issue of the *Journal of Management History*.

Most recently, Bowden (2021) offered his critique of much of the theorizing and empirical work since the "historic turn" in his article, "The historic (wrong) turn in management and organizational studies," as part of the special issue of the *Journal of Management History* coedited by Mills and Mills (2021). In framing the debates, he drew on the differences in perspectives on truth or facts (ontology) and how knowledge is represented (epistemology), noting that there are scholars who claim to represent the "historic turn" and who rely on Croce (1915/1921, pp. 73, 91), asserting that "facts do not exist" (as cited in Bowden, 2021, p. 8). Scholars who take a contrary approach often characterize their colleagues as "pluralists" while others are incorrectly grouped together as positivists. Bowden further asserted that the "historic turn" is primarily driven by those who take a more postmodernist perspective to history with a social agenda and who frequently do not provide a substantive perspective or a critique of the philosophical or theoretical foundations for their views. He offered as one example Cummings et al. (2017), who acknowledged that their work was inspired by Foucault, yet did not provide an in-depth discussion of Foucault's ideas or an analysis and critique of Foucault to inform the reader.

Bowden (2021) presented an analysis of what he considered to be the philosophical foundations for much of the theoretical work since the "historic (wrong) turn," including the philosophers Nietzsche, Foucault, and Latour and the historian White. In addition, he examined the substantive issues in the ANTi-history movement conceptualized in Latour's actor-network theory (ANT), which "argues that 'facts' and 'reality' can *only* be understood as socially constructed 'fictions'" (Bowden, 2021, p. 15). Mills et al. (2014, p. 235) advance that "there is no reality-correspondent 'truth' of the past" (p. 235, as cited in Bowden, 2021). "Instead, historical 'truth' is imaginatively constituted through 'words'" (Bowden, 2021, p. 13). History is socially constructed and emerges through actions and interactions of individuals with each other and texts that are also the products of a "self-interested actor-network" (Bowden, 2021, p. 16) and power. Bowden (2021) asserted that "*none* of the ANTi-History exponents have to-date even *acknowledged* the well-versed criticism of their premises" (p. 16).

In part, Bowden (2021) summarized that there is little "evidence of theoretical originality" in those who are connected with the "historic turn" (with the exception of ANTi-history) and that to the extent that some originality is present, "it largely results from mislabeling and confusion rather than from any new insight into either the nature of knowledge or the dynamics of modern organizations and management"

(p. 18). He also concluded that these scholars frequently "confuse ontology (i.e. nature of being) with epistemology (i.e. the ways in which we understand the nature of being)" (p. 19). Further, he suggested that "the fourth defining characteristic of the 'historic turn' literature is misrepresentation, a willingness to describe one's own chosen positions as 'pluralist' while lumping every opposing epistemological position together under headings such as 'positivist' and 'unitarist'" (Bowden, 2021, p. 19).

Books related to the historic turn

Several comprehensive texts also emerged as part of the reflections on the "historic turn" in OMS and offer frameworks and guidance for future theory and research. These books include *Management and Organizational History: A Research Overview* (Mills & Novicevic, 2020) and the *Handbook of Research on Management and Organizational History* (Bruce, 2020).

Mills and Novicevic's text examined "key scholarly debates around the inclusion of historical approach and the role of the past in studies of management and organization" (p. 1) through exploring and theorizing about "the relationship between history, theory and the past" in OMS (p. 1). Building on Rowlinson (2004), they highlighted the unique ways in which history can be defined and categorized historians from factual to narrative to archaeo-genealogical. They provided insights into the many factors that influence history however it's defined, including the social, material, technical, human, and time forces that influence historical accounts and how they are constructed and represented.

Bruce's (2020) text, *Handbook of Research on Management and Organizational History*, framed the "historic turn" in OMS in much the same way as others, in particular Mills and Novicevic (2020). Bruce asserted that the turn began with Clark and Rowlinson's (2004) article and since then there have been major debates generally between those promoting postmodernist approaches to history in organizational studies versus those who see history more broadly or take a positivist or postpositivist orientation. He cited an exchange between Cummings et al. (2017) in "A new history of management" (NHM) and the retort by Bowden (2018) in *Work, Wealth, and Postmodernism* (WWP):

> For the author of *WWP*, *NHM* and other "postmodernist calls for a 'historic turn' in organizational studies" are nothing short of a "puzzling and disingenuous . . . assault on rationality" (Bowden, 2018, pp. 19, 23). (p. 2)

Bruce then called upon Bevir's (1999, 2000, 2011) work, which took a more middle ground approach. Bevir (1999) stated:

> Although historians cannot be certain of the truth or falsity of their view of a historical meaning, they can reach an objective understanding that they have good reason to take as more or less true . . . through a process of criticizing and comparing rival sets of theories against

criteria of accuracy, comprehensiveness, consistency, progressiveness, fruitfulness, and open-
ness.   (p. 311)

In sum, he believed that "no particular evidence or method is either necessary or suf-
ficient to ensure that historians understand an utterance correctly" and that "the sen-
sible historian will cover all kinds of evidence, including the biography of the author,
other statements by the author, other relevant writings, and the socio-economic con-
text in which the author wrote" (Bevir, 2011, pp. 114–115).

Bruce (2020) commented:

> In this context, I believe that a great deal of postmodern historiographical work – and many of
> the attempts to import same into MOH – sails perilously close to attempting to distract atten-
> tion – by cloaking their writing in purposefully obscurantist and long-winded language – from
> the regrettable fact that these writers are simply unwilling or unable to actually *do* history.
>
> (p. 4)

Cummings et al. (2017) also surfaced as part of the debate in organizational and
management history, particularly as it is framed as the tension between positivist
and postmodernist views. In their text, *A New History of Management,* Cummings
et al. (2017) asserted that traditional approaches to management history as they ap-
pear in management textbooks constrain innovation through confirming and rein-
forcing present management practices with the assumption that they are advances
as part of the evolutionary process of history. They also noted that the historical
representation of management is narrowly focused on a relatively few countries
(United Kingdom, United States, Japan, Australia, New Zealand, and to a lesser ex-
tent South Africa) "while the rest of Africa, Asia and South America shrink to
slivers" (p. 2). Rather than ignoring history, they "argue the opposite":

> . . . rather than running away from history and paying it less attention, we should dive back
> in and take a broader look and uncover more than the narrow view recorded in conventional
> histories of management. More history rather than less could promote greater innovation.
>
> (Cummings et al., 2017, p. 4)

New approaches to history and organizational and management studies: Rhetorical history, ANTi-history, history as organizing, and history as a resource

Two newer approaches fostering the intersection between history and OMS are rhe-
torical history and ANTi-history. These approaches have been viewed as two of the
promising approaches (Mills & Novicevic, 2020; Mills et al., 2016; Suddaby, 2016) to
build upon both theoretical and empirical approaches to history in OMS. At the same
time, these approaches are framed as part of the "historic (wrong) turn" (Bowden,
2021) in OMS. Durepos, Mills, and McLaren (2020) acknowledged that in the years
since the "historic turn" in OMS, an increasing number of OMS scholars have been

interested in doing research in this area. Yet there are critical debates as to the validity and usefulness of the different approaches, with most grounded in differences in epistemological and ontological assumptions.

Suddaby (2016) addressed these debates in part as he discussed the "emerging historic turn." In reflecting on the historical turn, he acknowledged both the opportunity and the challenges in bridging the "massive intellectual chasm that exists between historians and management theorists" (p. 46). He advocated for the breadth of ideas for a "more inclusive 'historical consciousness' in business history that expands our collective assumptions about the nature and function of historical knowledge" (p. 46). He also proposed avenues for bridging management theory and business history through three constructs: rhetorical history, organizational legacy, and ANTi-history. He referred to these as bridging constructs, in that they may help bridge the frequent epistemological and ontological differences between historians and organizational theorists. In particular, Suddaby (2016) proposed rhetorical history as a "bridging construct" since it draws from the constructivist perspective that history is malleable and "can be used to convey social and symbolic capital" (p. 54), particularly in relationship to strategic goals, legitimacy, and organizational identity and reputation, yet it also must rely on the "structural objective elements of history as fact," which limits what can be done as "the objective elements of history as truth place clear limits on what can and cannot be done in the social-symbolic realm" (p. 55). He later proposed rhetorical history as one of three bridging constructs (ANTi-history and legacy as the other two), noting that it "collectively serves to provide us with a historical consciousness or a sensitivity and awareness of the degree to which history is both a product and a source of human reflexivity" (p. 57).

Rhetorical history

The importance of rhetoric in the historic turn in organizational studies surfaced as early as 1993. As part of his argument for the reconceptualization of organizational studies as science and humanities, Zald (1993) proposed "the uses of rhetoric for substantive analysis and meta-methodological reflection" (p. 519). The "rhetorical attitude" was also highlighted by Clark and Rowlinson (2004), who suggested that a historic turn in organizational studies would "represent a turn against the view that organization studies should constitute a branch of the science of society" (p. 331); in doing so, it would be similar to the linguistic turn in history toward a "Rhetorical Attitude" versus "the Scientific Attitude" (p. 331).

Definitions of rhetorical history primarily focus on the role of power in how history is used, particularly through communication for the advantage of the organization or leaders, frequently in relationship to strategic goals and organizational identity, reputation, and image (Foster et al., 2014; Poor et al., 2016). A key assumption is that memory and history can be managed and controlled by organizational leaders. For example,

Suddaby, Foster, and Quinn Trank (2010) defined rhetorical history as "the strategic use of the past as a persuasive strategy to manage key stakeholders of the firm" (p. 157), particularly in relationship to legitimating present actions (Suddaby et al., 2020). Similarly, Foster et al. (2014) defined rhetorical history as "the process by which managers skillfully impose meaning on the firm's past – as a persuasive and agentic process rather than a sequence of path-dependent experiences" (p. 104).

Rhetorical history has also been studied in relationship to organizational identity and leader communication in support of strategic remembering (Anteby & Molnar, 2012) and at times forgetting (Martin de Holan & Phillips, 2004), directed primarily at internal organizational members and other stakeholders. Other studies have broadened the potential audience or community to include external stakeholders (Smith & Simeone, 2017). When it is more internally focused, rhetorical history is connected to organizational identity and can focus on connections with the past, critical events in organizations, and the values of the founder in the "golden age" of the organization (Howard-Grenville et al., 2013). When it is more externally focused, it can be used to influence how the image and reputation of firms can be linked to "societal values and institutions" (Foster et al., 2014). Both types of rhetorical history can be helpful in supporting new initiatives or changes in strategy.

Given that rhetorical history is a device, its effectiveness depends on the skill of managers or others in power in organizations to use it. They must select key events and then create and communicate a story that effectively persuades others to achieve the organization's goals. Suddaby et al. (2020) referred to it as part of a dynamic capability of organizations. Smith and Simeone (2017) connected the potential promise of rhetorical history to historical culture – how people in a society view the past or how an organization's culture supports a view of the past.

Maclean et al. (2014) further linked the ideas of rhetorical history to sensemaking and organizational transitions. They proposed that historical narrative serves "as a vehicle for ideological sensemaking by top executives, who draw on the interpellative power of rhetorical narrative to address conflicting systems of meaning and support their agendas for organizational transition in the present and future" (pp. 32–33).

Research on rhetorical memory has focused on the content of the memory and how it is used, particularly in relationship to organizational forgetting and organizational identity. More recently, research has turned to how memories are formed and evolve (Ravasi et al., 2019), as well as a history of how the use of corporate history emerged, i.e., a history of the practice of using history in corporations (Smith & Simeone, 2017). A historiographical study of the emergence of this practice has the potential to help us theorize about the path of firms to take the approach of the strategic use of rhetorical history (Smith & Simeone, 2017).

ANTi-history

ANTi-history is grounded in Latour's theoretical work on actor-network theory (ANT). One of the key ideas in ANTi-history is that the social world is a process of social relationships in a continuous expanding network. Durepos and Mills (2011) "contend that it [ANT] can also be applied as an approach for understanding knowledge creation of the past as an effect of heterogeneous actor-networks (Law, 1992)" (p. 708). It is represented in part by tracing the actors in a network as they form networks, and the actions of the network as actors (Durepos & Mills, 2011) and, in doing so, surfacing the political aspects of the construction. The focus is the interactions between actors and networks guided by a process approach. Multiple versions of the past can be constructed through actor networks. Context is also a significant feature. Part of that is the context of the past. In addition, "to the extent that the historian is an outcome of, and stands on behalf of, her historical context" (Durepos et al., 2020, p. 276), the ongoing present context must also be explored and incorporated in the histories. Constructing, writing, and doing history also takes place as a process of network formation (Durepos & Mills, 2011, p. 709).

Durepos and Mills (2011) observed that an important missing piece in Latour's ANT was the inclusion of the "socio-past." They acknowledged this gap and proposed the following bridge:

> To date, cultural theory historiographers have remained silent on the emergent constitution of the past and on their end, ANT scholars have remained relatively silent on theorizing history, past, and historiography. In this article we attempt to bridge this intellectual divide through what we will call ANTi-History. (Durepos & Mills, 2011, p. 711)

Durepos and Mills (2011) further argued that "in using ANTi-History, one should not let preconceptions of the composition of the past impose itself on the ordering of the traces of the past into history" (p. 711). They saw the task or practice of ANTi-history as "dramatically different. It acknowledges that history and knowledge of the constitution of the socio-past is performed through an actor's effort to define and characterize it" (p. 712). It is an iterative construction of the past and present, and "the actor-network should speak louder than the voice of the trained historian" (p. 712). Part of the purpose is to understand the actor-networks, the conditions in which and upon which it is constructed, and the politics that influence or are a part of this process. It is also a process or a construction with an agenda or instrumentality with a current context and situation in mind versus a stand-alone single construction of the past.

> "History," therefore, is denied a fixed or a closed meaning because it is subject to the continuous interpretations of situated (ideologically, spatially, temporally) actor-networks who engage with it and read into it with their interests at hand. This means that an actor-network's interpretation of 'history' may never be faithful to the tale told. (Durepos & Mills, 2011, p. 715)

Transparency and reflexivity are also critical components of ANTi-history. ANTi-history is "interested in ensuring transparency in the craft of history, whether that means illustrating the interests of the actors of an already-published history or (re)assembling history in a manner that is transparent" (Durepos & Mills, 2011, p. 715).

ANTi-history also assumes that multiple histories could be constructed; it emphasizes plurality of ideas, voices, stories, and choice relative to the interpretation and meaning of these histories. These choices in the construction and interpretation process provide the possibilities for "liberating actors from otherwise dominant interpretations of the socio-past that constrain or disenfranchise their local way of knowing" (Durepos & Mills, 2011, p. 716).

Context is critical to ANTi-history (Durepos et al., 2020). One aspect is the context of the historian in the present, including the social, political, geographical, cultural, and economic factors that potentially influence how the history is constructed. The other consideration in relationship to context is the context of the past, the historical event that is being constructed. These factors also influence which "facts" are preserved and how they are preserved in books and other media. In their critique of the modernist perspective of history, Durepos et al. (2020) asserted that "historians who work in the modernist conditions privilege the past context while minimizing the potential for the present-day context to bias the history" (p. 278) and believe that the purpose of history is an objective description of the past. They also asserted that "modern historians treat context as a stable container of the past" (p. 279).

Using ANTi-history assumes that history is a "practice rather than a profession" (Durepos et al., 2020, p. 285), and the work of the ANTi-historian is to "trace the actors and document how they build the story, account or narratives" and how the historian "builds her work, networks and context" (p. 287).

Other new avenues to understanding the role of history in organizations

Recent work on history and collective memory in organizations supports some of the key points in the theory and research on rhetorical history and how narratives about the organization's past are used in organizations (Hatch & Schultz, 2017; Ravasi et al., 2019; Rowlinson et al., 2014). The similarities to rhetorical history are related to the assumption that the past is malleable and that it can be used to support present and future initiatives, as well as the view that recounting of the past can be influenced by power and other variables. The difference in these ideas is the degree to which the past is malleable and the critical importance of authenticity, particularly in relationship to the accuracy of the accounts of the past and the relationship to organizational identity.

Some of the early work on collective memory in organizations (Casey, 1997) and later in relationship to organizational identity found that the narratives evolve but often around a common thread of meaning in relationship to organizational identity

and historical events in an organization's history. Authenticity in historicizing (Hatch & Schultz, 2017) and connection to significant events, both in relationship to organizational identity as well as an organization's history (Casey, 1997, 2019), are critical factors influencing what events are recalled, as well as how they are recalled and used in the organization. This research runs counter to rhetorical history approaches, which theorize that the past is malleable and new narratives or stories of past events can be constructed without supporting evidence to link to present or future strategies. For example, Ravasi et al. (2019) stated:

> Research on uses of history seems to assume that organizations enjoy a wide latitude in their capacity to amend historical records (Anteby & Molnar, 2012), revisit their biographies (Rowlinson & Hassard, 1993), craft new narratives (Suddaby et al., 2010), or reuse historical artifacts (Hatch & Schultz, 2017). Collectively, these studies advance a view of history as a flexible rhetorical resource that can be used with limited external scrutiny or constraint.   (p. 1551)

They noted that, in contrast, their study showed that

> the presence of a mnemonic community centered on the organization exists, uses of history are embedded in a web of mnemonic practices carried out partly outside that will influence how history is used, either because of the pressures that members feel from the mnemonic community to act in continuity with the past, or because of the opportunities that they envision to connect with collective memories to reinforce this community and extend its boundaries.   (Ravasi et al., 2019, p. 1551)

Ravasi et al. (2019) addressed the idea of a historical imperative:

> The concept of historical imperative suggests an understanding of organizational engagement with history that departs from prevailing views in organizational research of history as path-dependency (e.g. Kimberly & Bouchikhi, 1995) or a rhetorical strategic construction (e.g. Suddaby et al., 2010). It acknowledges instead that history is periodically reconstructed and used in light of present day concerns (e.g. task goals), but at the same time underlines how this reconstruction is bound by the material memory that it draws upon and the mnemonic practices and expectations of relevant audiences. Thus, although the historical imperative we describe reflects the "burden of history," it does not do so in a deterministic way. It guides organizational action to be both historically informed, and responsive to current strategic concerns.   (p. 1551)

This approach is similar to Suddaby's (2016) thoughts on rhetorical history as a bridging construct, in that it draws from the constructivist perspective that history is malleable and "can be used to convey social and symbolic capital" (p. 54), particularly in relationship to strategic goals, legitimacy, and organizational identity and reputation. At the same time, it must also rely on the "structural objective elements of history as fact," which limits what can be done, as "the objective elements of history as truth place clear limits on what can and cannot be done in the social-symbolic realm" (Suddaby, 2016, p. 55).

    More recently, there has been some empirical work on collective memory, narratives, and rhetorical history that has moved toward understanding how these narratives are created, including the interaction of individuals both internal and external

to the organization with different types of memory (Anteby & Molnar, 2012; Ravasi et al., 2019; Schultz & Hernes, 2013) and also material objects (Hatch & Schultz, 2017; Ravasi et al., 2019).

Building on this rich multidisciplinary literature, the next chapter investigates in more detail the conceptual foundations of the field and identifies opportunities for expanding and deepening theoretical work in organizational and management history.

Chapter 3
Theoretical Framing for Organizational and Management History: Time, History, and Organizations

Time has been a central topic in the humanities and social sciences and more recently in multidisciplinary studies of complexity (Ancona et al., 2001; Bluedorn & Denhardt, 1988). Within organizational studies, time has mostly been addressed indirectly in the exploration of history and memory in organizations, particularly in relationship to organizational identity (Anteby & Molnar, 2012; Hatch & Schultz, 2017). This exploration has often involved a rhetorical history perspective (Suddaby et al., 2010) or sociological theories of collective memory (Schwartz, 2000, 2005). Yet the interest in time and the impact of "differing temporal spans" (Clegg et al., 2021) on organizations is increasing and provides inspiration for theorizing in historical organizational studies.

In the introduction to a special issue on expanding the understanding of time in organizational studies research, Ancona et al. (2001) asserted that time or temporality permeates different lenses we use to theorize and conduct research in organizational studies, such as strategy, culture, or politics. Yet, in most of this work, time is peripheral – despite its importance in management practice. Most of the theory work in organizational studies does not directly theorize about time or draw from the rich theoretical work in philosophy, cultural anthropology, cultural history, and sociology. This chapter begins to address this gap in the literature by focusing on the relationship between time and organizational identity and by exploring this relationship from the robust multidisciplinary theoretical work on time. Specifically, it asks three interrelated questions:

1. How does an organization's distant past influence its distant future?
2. What impact does this interplay of past and future have on organizational identity?
3. What role does intentionality play in this dynamic?

The methodology we use to explore the three interrelated questions is essentially multidisciplinary, drawing on historiography and cultural sociology (Atkinson, 2018; Barthes, 1980; Bourdieu, 1977; Braudel, 1949/2008), philosophy (Bergson, 1911/2013; Friedman, 1954; Husserl, 1913/1983; Kant, 1781/2018; Lapoujade, 2018; Masi, 2016), cultural anthropology (Appadurai, 2013; Gell, 1992; Munn, 1992), and organizational studies.

Multidisciplinary understandings of time

Some historians, like Braudel, have investigated the incessant changes that occur in time, leading to layers upon layers of "past" moments and contexts, reduced to milestones only in the "ex post facto" of (written) history. In his foundational historical study, *The Mediterranean and the Mediterranean World in the Age of Philip II* (1949, republished 2008), Braudel defined the long-term construction of history as a slow and layered interaction between societal groups, encompassing society's rapport with the environment and extending deeply into the remote past as well as projecting into the present and future. This layered approach points to a plural and multiperspective (re)construction of history, weaving together different aspects of the past with different angles – economic, political, sociocultural – from which to explore each aspect (Braudel, 1958). Braudel contrasted the historical event, understood as a singular occurrence with well-defined boundaries, to the duration, especially the long-term one. He referred to the long-term as the *longue durée* and indicated that it allows a deeper historical understanding of larger societal structures, even of societies as a whole and of civilizations, and to our purposes here, of institutions and organizations (Braudel, 1958). Braudel also explored the cyclical nature of layers of historical time, especially from the perspective of social (sociopolitical and sociocultural) history – all of which can be best studied, he argued, from a long-term standpoint, from over a decade to several decades to centuries, depending on the object of study (Braudel, 1958).

In the scholarship of Braudel and other historians of the Annales School, the *longue durée* also signals an immobility of (collective) mentalities and practices, correlating long spans of time with the absence of (sociopolitical and sociocultural) change (Burguière, 2009). Bloch and Febvre, for example, utilized the Braudelian *longue durée* to articulate a "historicity of mentalities"; Bloch, in particular, outlined a mechanism by which attitudes and practices from the distant past resurface and get transformed as they combine with more recent attitudes and practices, thereby calling attention to the overlay of "mentalities" from multiple points in time that characterizes *longue durée* history (Burguière, 2009). The Annales literature explores the interrelated tensions between historical event and long historical duration; between the original period of a phenomenon and its iterations at subsequent points in history; between collective mentalities and their histories of endurance and change; and between the immobility and transformation of social practices and structures as observed over long periods of time.

Sociologists and semiologists (Barthes, 1980) have grappled with the paradoxes of time, from the construction of memory via photography to the role of temporality in consciousness and the role of consciousness in the perception of temporality (Atkinson, 2018). Sociologists such as Sorokin and Merton (as cited in Bluedorn & Denhardt, 1988) have explored the sociocultural dimensions of time with a focus on the meaning of significant events and how these events structure time within the social system (Bluedorn & Denhardt, 1988).

In philosophy, too, the understanding of time has largely revolved around the relationship between the individual on the one hand and personal and collective understandings of time on the other. For Kant, time cannot depend on personal conditions, although he famously defined time as the "form of internal sense" (Friedman, 1954). For Husserl, in the framework of phenomenology, temporality is inextricably linked to the elusive nature of individuality (Masi, 2016). In his theorizing about temporality, Husserl (1964, as cited in Bluedorn & Denhardt, 1988) also integrated ideas about intentionality as he differentiated action from behavior. Action is framed within the "intentionality of meaning by which that action is guided" (Bluedorn & Denhardt, 1988, p. 301) and also the past, present, and future (Schutz, 1932/1967). For Bergson (1911/2013), time – especially in the form of duration and memory – is, again, closely interrelated to its essentially affective perception (Lapoujade, 2018).

Cultural anthropologists, examining sociocultural time, theorized about some of the same aspects that historians and philosophers addressed, namely the complexity of constant accumulations of sociocultural changes over time and the emotional, affective, subconscious dimensions of individual and collective understandings of time. Conceptualizing time as culturally conditioned, anthropologists defined time as a simultaneously cognitive and social construct and probed the extent to which time can be (and has been) considered a socioeconomic resource (Gell, 1992). More recently, some anthropologists have theorized the present in terms of its multiple and interrelated pasts or genealogies, positioning the future as a (multi-)cultural construct (Appadurai, 2013).

In contrasting the theorizing of time in management studies and practice with theoretical work in other social science disciplines such as sociology and philosophy, Bluedorn and Denhardt (1988) asserted that time "is fundamentally a social construction (cf. Berger & Luckmann, 1966) that varies tremendously between and within societies" (p. 300). In that spirit, Jenkins (2003) famously drew an important distinction between past and history, wherein past is understood as an accumulation of micro and macro events and changes, along the lines of the theories formulated by Braudel (1949/2008), and history is understood as an (oftentimes written) construct of the past. We argue that new scholarship in organizational and management history would benefit significantly from engaging with literature on historiography from different disciplinary angles (e.g., intellectual history, philosophy of history, historiography and critical analyses thereof, metahistory, etc.). Table 3.1 offers the reader a selected annotated list of references that provides a cross-section of the multidisciplinary literature on historiography, the deep and layered history of historiography itself, and the interrelated concepts that this scholarship presents, with great utility for organizational and management history. In Table 3.1, each title is accompanied by a brief description related to the scope of this book. The list of references is not exhaustive; instead, it introduces works that, per the perspectives of this book's authors, are foundational within their disciplines. We intentionally focus on sources outside of the literature in organizational studies and organizational theory to encourage interdisciplinary understanding and dialogue.

Table 3.1: Annotated references on historiography from multiple disciplinary perspectives.

Citation	Notes
Bloch, M. (1953). *The historian's craft*. Alfred A. Knopf.	In *The Historian's Craft*, Bloch discusses the nature of history as a historian's perspective on the past formulated in literary form. The book includes Bloch's thoughts on wide-ranging historical texts from Julius Caesar to his contemporaries. He advocates for an "objective" approach to the facts of the past and for a historical account that is more "human" and more widely encompassing in terms of both geocultural spaces and time periods. Together with historian Lucien Febvre, Marc Bloch was a founding member of the Annales School.
Breisach, E. (2007/1983). *Historiography: Ancient, medieval, and modern* (3rd ed.). University of Chicago Press.	A history of historiography, Breisach's book reviews the roots of historiography in Greek epic poetry and provides overviews of its different modern and contemporary formulations, including postmodernism, deconstructionism, African American history, women's history, microhistory, the Historikerstreit, and cultural history. In his analysis of historiography throughout the major periods and moments that articulated changes in direction and methodology, Breisach defines historiography as both meaning-making (understanding the past) and writing (narrating the past). Breisach's book also sheds light on how historiography at one moment in history was perceived at a subsequent moment, taking into account the social, cultural, political, and economic contexts that shaped any given approach and the interpretation and alteration thereof in subsequent periods.
Canning, C., & Postlewait, T. (2010). *Representing the past: Essays in performance historiography*. University of Iowa Press.	Exploring issues of historiography from the perspective of theater studies, this book is a collection of essays on the history of performance and stage arts, all of which adopt interdisciplinary perspectives on time, space, identity, narrative, and the archive. The essays explore the epistemological avenues by which historians of performance and stage arts attempt to make sense of the past and subsequently represent it in writing. In so doing, the volume provides an analysis of historiographical methods and their challenges and limitations.

Table 3.1 (continued)

Citation	Notes
Gibbon, E. (1776–1789). *The history of the decline and fall of the Roman Empire.* Strahan & Cadell.	A six-volume work by the influential 18th-century historian Edward Gibbon, this book is a helpful early example of related approaches to historiography, according to which a seemingly objective tone and presentation of facts is combined with self-acknowledged opinions of the historian (in Gibbon's case, an anti-Catholic sentiment that characterized, to various degrees, the works of Enlightenment thinkers like Gibbon). The book is also a rich case study in the interconnectedness of the historian's intellectual positions, on the one hand, and his or her magnum opus, especially as the latter is written over decades, becoming a record of the historian's own evolution of thought. In this sense, the book is a history of the historian's epistemological trajectory before being a history of the object of study at hand.
Hay, J. (1994). The suspension of dynastic time. In J. Hay (Ed.), *Boundaries in China* (pp. 171–197). Reaktion Books.	An influential essay from the discipline of art history on layers of time and art historiography, Hay's "The suspension of dynastic time" is part of a collection of essays presenting different perspectives on historiography in the subfield of Chinese art history. The premise across essays is that a hermeneutical approach to the literary and material culture of China's past can help articulate a picture of the psychodynamics of Chinese society over time. Essays delineate temporal segments unevenly, from centuries-long dynastic periods to condensed multiyear periods, bridging macro and micro approaches to history. Essays also explore how early periods were conceptualized in later periods, commenting on the history of historiography pertaining to Chinese art and culture in China.
Macaulay, T. (1848). *The history of England from the accession of James the Second*. Macmillan and Co.	An influential historical account by the 19th-century historian and politician Thomas Macaulay, *The History of England* illustrates a style of historiography that combines poetic prose with an account of the past that was filtered, consistently and significantly, through the values and sociopolitical paradigm of the author. The book uses history as a springboard for formulating philosophical positions and sociocultural standpoints, thereby conferring a historical perspective on the author's formulation of his own worldview. The book weaves a teleological, progress-driven narrative of history, emphasizing macro changes that are regarded as positive. From this perspective, the book epitomizes Whig historiography and more generally exemplifies teleological approaches to historical process.

Table 3.1 (continued)

Citation	Notes
Mink, L. (1987). *Historical understanding*. Cornell University Press.	*Historical Understanding* is an influential collection of essays on the philosophy of history and metahistorical approaches to historiography, all by historian Louis O. Mink (1921–1983). Topics include the phenomenological lens on history writing and critical analyses of the influential texts of W. H. Walsh, Hayden White, A. O. Lovejoy, and R. G. Collingwood. In Mink's view of history, narrative plays a central role; he distinguishes between narrative as an objective account of the past (narrative as representation) and narrative as a historian's analysis of the facts of the past to the extent to which they are known (narrative as interpretation). Throughout the book, he argues that the historian can find a balance between these two understandings of narrative – a balance that favors factual accuracy and factually informed analysis – by grounding the narration (i.e., the writing of history) in a nuanced understanding of historical change.
Wood, I. (2013). *The modern origins of the Early Middle Ages.* Oxford.	Wood's *Modern Origins of the Early Middle Ages* concerns itself with historical narratives of the origin point of historical periods (for example, the fall of the Roman Empire being construed, in modern historiography, as the origin of modern Europe). Wood argues that different origin points are identified in different historical periods, creating a temporal and dynamic picture of how any given historical period is temporally bracketed and defined. Wood also argues that a historical period's origin story influences significantly not only how that historical period is portrayed, but also how the effect of that historical period is perceived and deployed in the present from different perspectives (political, social, and cultural). Focusing on the dynamic picture of origin stories for "modern Europe" as a historical period, Wood weaves together a history of the historiography of "modern Europe," showing how different origin stories resulted in different taxonomical and definitional discourses.

Multidisciplinary approaches to time in organizations

Exploring the implications and ramifications of these interrelated notions of time as social construction and of the past as distinct from history, we examine how organizations can use, and have used, elements of the past to strategically plan for the future. Divorcing this practice from its negative connotations, as it is sometimes understood as a manipulation of the past for commercial or political gain (Eriksen, 1996; Jenkins, 2003), we focus instead on how the practice affects the identity of the organization.

Recently, the temporal dimensions of organizational identity and strategy have been theorized and empirically studied (Schultz & Hernes, 2020a), with the premise

that strategy focuses more on "a short-term actionable future" (Schultz & Hernes, 2020a, p. 106), while organizational identity is connected to the past and, to some degree, the future (Schultz & Hernes, 2020a). Bluedorn and Denhardt (1988) proposed that the work in organizational studies related to time is most often studied in the context of "decision making, motivation and group behavior" (p. 300) and planning, with more work at the micro rather than the macro level. Theorizing and empirical work is linked primarily to organizational productivity and efficiency, with the assumption that time is a resource that can be managed or controlled (Bluedorn & Denhardt, 1988).

Schultz and Hernes (2020a) conceptualized the temporal dimensions related to strategy and organizational identity as temporal structures, "defined as the structuring of time into past and future events and horizons that are particular to an organization" (p. 107). They referred to "temporal structures" in relation to "the notions of *temporal depth* and *time horizons*" (p. 108) and proposed that "the longer time horizons of identity may provide directions for the future and references to the past, enabling actors to make sense of strategic change and thereby increasing the likelihood that strategy will be realized" (p. 107). They found, in part, that "the temporality of identity works in framing strategies through better-defined time horizons" (Schultz & Hernes, 2020a, p. 130).

Tensions that persist over time – defined as organizational paradox (Smith & Lewis, 2011) – accumulate in an organization's present and affect prognoses and strategies for the organization's future. From a systems perspective, and through the lens of paradox theory that adopts an integrative, "both/and" approach to tensions (Lewis, 2000), time becomes a vital component in understanding organizations, especially their identity and change. While the tensions themselves can be atemporal – for example, the tension between profitability and growth, or between employee productivity and work-life balance – their dynamic interplay unfolds over time, and it can be isolated and analyzed for different lengths of time, whether a fiscal year, a decade, or throughout the lifespan of the organization.

We build on these important studies, linking notions of time with organizational strategy by thinking of "temporal depth" in terms of micro changes (as defined by Braudel, 1949/2008) and latent tensions (as defined by Schad & Bansal, 2018). We explore how organizational identity is potentially affected not only by momentous change and pivotal moments, but also by the accumulation of hardly noticed shifts, all combined with the intentions of different stakeholders, in different socioeconomic and sociopolitical contexts.

Interdisciplinary synthesis: Points of intersection in defining organizational time

An interdisciplinary approach enables us to identify intersections between similar concepts in different fields, such as latent tensions from a systems perspective (Schad & Bansal, 2018) and *longue durée* micro changes from a social history perspective

(Braudel, 1949/2008). We created a diagram (Figure 3.1) to visualize conceptualizations of organizational time from process, systems, and social history perspectives. As presented earlier in this chapter, these perspectives are not the only ones to provide insight on time and on organizations; they are not even singular in addressing the intersection of time and organizations specifically. However, they serve to illustrate how different paradigms can be considered together in order to identify their discrete and shared contributions, all of which can constitute foundational conceptual building blocks for interdisciplinary frameworks and studies.

The diagram attempts to list what is distinctly characteristic of each perspective as well as each point of intersection (i.e., between each two perspectives in addition to the nexus of all three perspectives). The exercise leads to the identification of seven key concepts, in no particular order:

1. Discontinuities in the temporal flow drive change (Langley et al., 2013).
Disruptions – whether perceived as positive or negative – often lead to change, and understanding that phenomenon as it unfolds in time can shed light on the relational and dynamic aspect of tensions in organizational change. This approach can also help discern between short-term tensions and long-term tensions, and between event-driven and duration-driven changes. Recent scholarship has engaged this approach, for example, to make sense of the effects of the COVID-19 pandemic on organizations, especially utilizing a paradox approach to pandemic tensions in organizations and the role of the pandemic in recent organizational changes (Carmine et al., 2021).

2. Macro and micro changes in contexts that are external to the organization affect the organization (Braudel, 1949/2008).
Change can be considered at both macro and micro levels not only intraorganizationally, but also in terms of extraorganizational contexts – sociocultural, sociopolitical, etc. – that directly or indirectly affect the organization. According to Braudel (1949/2008) and historians of the Annales School, understanding sociohistorical contexts entails discerning between event-centric and *longue durée* changes. In terms of organizations, these notions suggest two axes of analysis: first, intra- and extraorganizational contexts, and second, event-based and *longue durée* processes of change.

3. Tensions within organizations are complex, as opposing forces and multiple binaries of opposing forces coexist and interact (Lewis, 2000).
Making sense of tensions in terms of clearly defined binaries of opposing forces often leaves out the complex nature of tensions: their indirect or direct nature, their sudden occurrence or gradual development over time, and their interaction with, and influence over, other tensions within and outside of the organization.
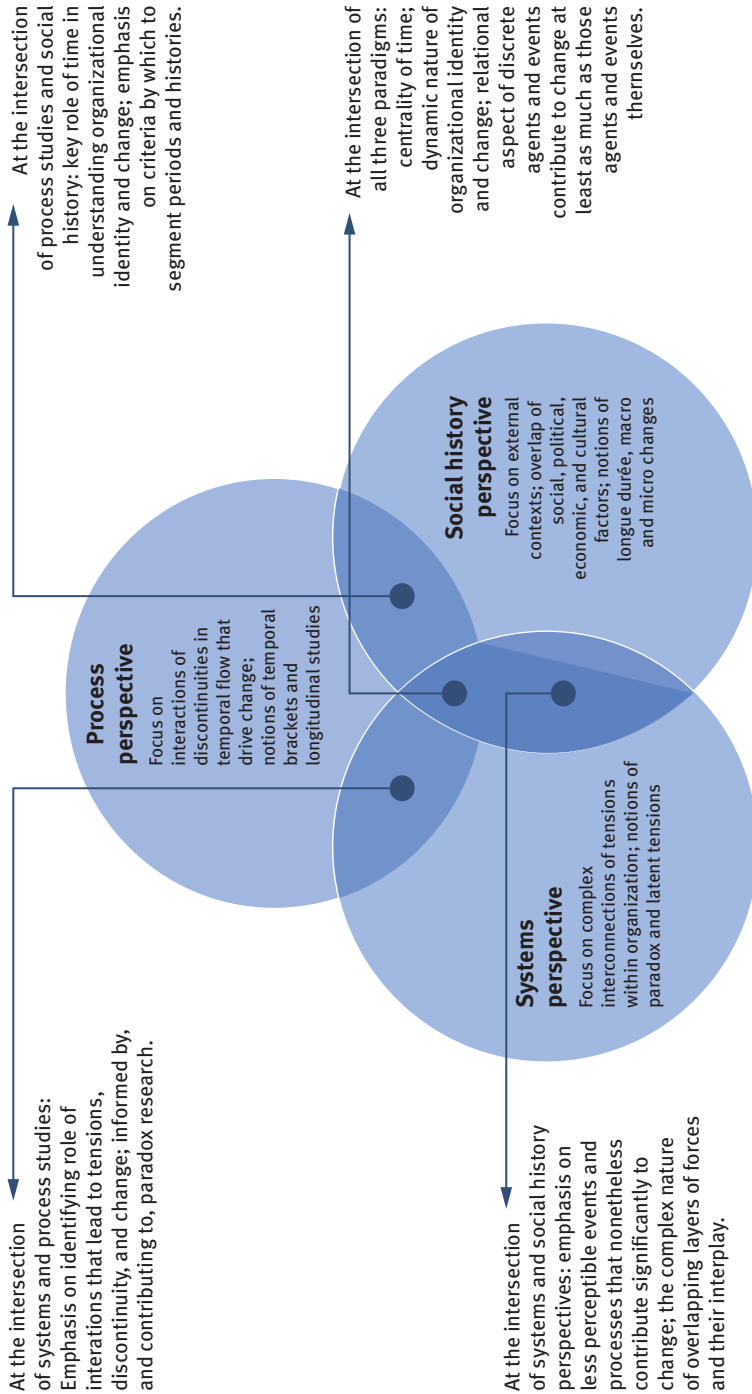
At the intersection of process studies and social history: key role of time in understanding organizational identity and change; emphasis on criteria by which to segment periods and histories.

At the intersection of all three paradigms: centrality of time; dynamic nature of organizational identity and change; relational aspect of discrete agents and events contribute to change at least as much as those agents and events themselves.

Social history perspective

Focus on external contexts; overlap of social, political, economic, and cultural factors; notions of longue durée, macro and micro changes

Process perspective

Focus on interactions of discontinuities in temporal flow that drive change; notions of temporal brackets and longitudinal studies

Systems perspective

Focus on complex interconnections of tensions within organization; notions of paradox and latent tensions

At the intersection of systems and process studies: Emphasis on identifying role of interations that lead to tensions, discontinuity, and change; informed by, and contributing to, paradox research.

At the intersection of systems and social history perspectives: emphasis on less perceptible events and processes that nonetheless contribute significantly to change; the complex nature of overlapping layers of forces and their interplay.

Figure 3.1: Venn diagram exploring similarities and differences in conceptualizing organizational change over time from process, systems, and social history perspectives.

Note: The figure does not capture approaches to research design, which presents marked differences as well as some similarities across the three perspectives.

4. Time plays a key role in understanding organizational change, especially in terms of the criteria by which time is segmented in organizational narratives.

If temporal segments are important to consider in order to understand organizational change, the criteria used to define the boundaries of temporal segments, durations, or periods play a significant role in how change is understood and analyzed. For example, are the criteria based on extraorganizational factors such as a political regime or the aftermath of a natural disaster, on intraorganizational factors such as rebranding or leadership tenures, or a combination of both? Given the complexity of this exercise, methodological rigor and transparency are key with regard to the identification and selection of temporal segmenting criteria.

5. Less perceptible events and processes significantly affect organizational identity and change (Braudel, 1949/2008; Schad & Bansal, 2018).

Beyond significant events and highly visible changes, even those that unfold over longer periods of time, there are less perceptible disruptions both within and outside of the organization that contribute to changes in an organization's trajectory and, cumulatively, in an organization's identity. From different disciplinary angles, scholarship from history and paradox studies sheds light on the usefulness of an in-depth investigation of less visible events and processes that can help crystallize a more nuanced picture of the agentic forces that contribute to organizational change over time.

6. It is important to recognize the nature of the interaction of tensions to understand how tensions affect the organization over time.

Elucidating the ways in which tensions influence and shape one another has been explored in recent literature and warrants further theoretical and empirical work. For example, recent scholarship suggests that tensions can be not only coexisting but also coevolving in organizations, which are defined as "inherently paradoxical" (Jarzabkowski et al., 2013). Other literature emphasizes the role of agentic forces from within the organization in combining tensions that become interwoven (Sheep et al., 2017). Another perspective shows that one model by which different tensions become interwoven is when tensions are nested, and different tactics of integration and differentiation can help organizations navigate these interrelated paradoxes at different organizational levels (Andriopoulos & Lewis, 2009).

7. As they unfold over time, organizational identity and change are relational, dynamic, and complex.

Considering all of these perspectives and insights, the common denominator that emerges is an understanding of the relational, dynamic, and complex nature of the intersection between organizations and time, with multifaceted consequences on organizational identity and change.

Considered together, these conceptual building blocks suggest that a historical perspective and an emphasis on organizational time can help construct a fuller and more detailed picture of organizational narratives and the forces behind them.

The multidisciplinary conceptual building blocks also speak to the tension of transmission and transformation of organizational identity, as different forces (agentic and nonagentic, macro and micro, internal and external) affect the organization during its lifespan (Figure 3.2). These binaries present a nonexhaustive checklist of considerations for exploring and understanding the intersection of time, history, and organizational identity. We use the term *binary* here as opposed to *tension* both to disambiguate from the meaning of tension in paradox studies and to embrace the integrative, coexisting, and interactive approach to forces in tension according to paradox studies. The agentic/nonagentic binary draws attention to the role of intentionality or lack thereof in events and contexts that affect the identity of an organization. The macro/micro binary points to the multiple scales of forces shaping organizational identity; on a temporal scale, it ranges from isolated events that mark a before and after in the organization's history to longer-term processes that progressively and cumulatively leave a mark on organizational identity. The internal/external binary refers to the coexistence of shaping forces both within and beyond the organization, particularly emphasizing the importance of considering external factors in the analysis of organizational change over time.
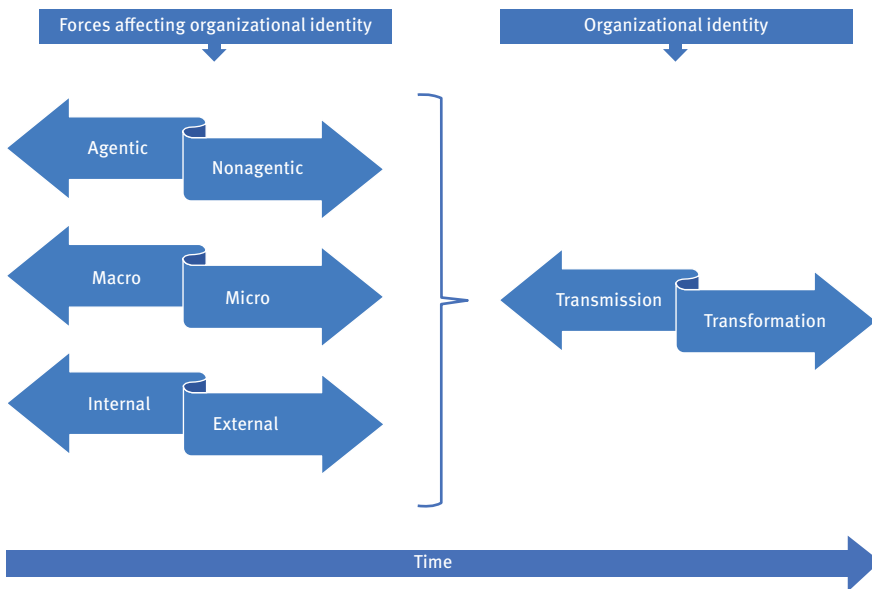
Figure 3.2: Binaries of tensions affecting the interplay of time, history, and organizational identity.

Conceptual building blocks: Spotlight on organizational duration and distance

It is often the case that organizations, particularly those with a long history, see the effects of their history in the present. Discounting the past from prognoses of the future is all the more difficult when the past looms large in an organization's identity in the present (Casey, 2019), surfacing in times of significant change or a pivotal point or crisis (Whetten, 2006) when the path forward from "who we are" to "who we will be" is in question. In organizations where the (distant) past is believed to ontologically affect particularly a long-term (distant) future, the organization's main task in the present is to transform challenges posed by inherited tenets into opportunities to shape or at times sustain key components of organizational identity in the future.

We assume that intentionality plays a major role in the cumulative evolution of organizational identity, as inherited core characteristics of the organization that serve to differentiate the organization from others in its sector are either downplayed or emphasized, depending on variations in the value systems of the organization's leaders (Hatch & Schultz, 2017) or, in particular, the founder(s). The changes that follow from such intentional strategic uses of the past are further complicated by the different paradigms of the eras that the organization traverses. The longer the timeline, i.e., drawing from a distant past and projecting far into a distant future, the more complex this dynamic becomes, and the more tied to the chain of sociopolitical and sociocultural contexts into which the organization was embedded.

In design theory and newer disciplines like technology leadership, it has long been affirmed that a significant difference in scale becomes a difference in kind (Allen, 2004). Similarly, the complex mechanism described above – namely, the role that accumulated values, intentionality, and sociocultural embeddedness play over time in the development of an organization's identity – is ontologically different for a short-lived organization (such as today's many companies that are being started without an intention of longevity) as opposed to a long-lived organization, one that has a distant past and is poised to have a distant future.

Dwelling more on the latter premise, we analyze what we mean by "distant," not only in terms of numbers of years, but also in the sense of theorizing "distance" in the context of organizational studies. Distance has long been understood to be spatial, temporal, psychological, and familial/social (Merriam-Webster, n.d.). In an organization's (long) lifespan, the element of distance is not only temporal; instead, it involves aspects of space/culture and familial/social networks.

This multivocality of "distance," as applied to an organization's lifespan, calls to mind the notion of *longue durée* in historiography, used to analyze plural temporalities, the deep past, and the changing relationships between individuals/associations and the world over long periods of time (Braudel, 1949/2008; Lee, 2012). Braudel's notion of time, in particular, is useful in understanding the time of a long-lived organization, although his notion of a struggle between the agency of individuals/associations

and the unavoidable effects of the constant stream of sociocultural micro changes effected by time needs to be reassessed when it comes to organizations.

To explore the three interrelated questions, the next section repositions theories drawn from multiple disciplines in the context of organizational identity. We examine how these theories can inform a series of conceptual tools and cohere into a theoretical model that provides insight into the relationship between layers of time and organizational identity. We explore an organization's strategic use of the past and foreground considerations of time in relation to theories of organizational change (Asimakou, 2009; White & Bednar, 1991). We conclude with propositions for future research.

Conceptual foundations

To structure our thinking into a theoretical model, we examined the constellation of terms, categories, and other considerations presented thus far as conceptual building blocks from different disciplinary angles, all of which represent indispensable conceptual foundations in analyzing time in organizations. After a brief review of these conceptual foundations, we present and explain a working theoretical model that we offer to students and scholars as a springboard for future study.

Duration. Building on the meaning-making aspect of the aforementioned construct of *longue durée*, we think of "duration" as both span of time and sociocultural content, since it is the latter that defines the boundaries of the "duration." For example, consider an organization that had a 2-year branding campaign. When we say, "for the duration of the branding campaign," the "duration" refers to the period during which the campaign took place (2 years), but it also implies that the branding campaign separates out those 2 years as a discrete segment in the organization's timeline. The concept stretcher here is thinking of duration not only in terms of a quantified segment of time (number of hours, days, years, centuries), but also in terms of what happened that made that span of time a discrete unit in the organization's life.

Distance. Relying again on the useful premises of the historical notion of *longue durée,* we reframe "distance" in terms of time, capturing the intellectual and affective implications of qualifying something as "distant." On the one hand, when something happened in the "distant" past, it is perceived as irrelevant for the present because of the "distance" that intervened. In that case, is the "distance" a vehicle for (intentionally) forgetting? On the other hand, the "distant" past has gravitas, especially if it is understood to include the organization's founding moment (typically a defining episode in the organization's identity). In this sense, calling upon the "distant past" becomes a rhetorical tool in organizational decisions of the present. A similar scale from irrelevance to utmost importance can be imagined in terms of an organization's

"distant future." Therefore, "distance" is a useful conceptual tool to gauge the rhetorical uses of time in organizational identity.

Culture. Building on the aforementioned literature in history and philosophy, we think of culture as the space of time, not in the sense of postmodern interpretations of Augustinian doctrine, but more literally as the arena of sociopolitical and socioeconomic changes that unfold over time and impact, to various degrees, an organization's trajectory and identity.

Changes effected by time. Closely related to the previous conceptual tool, there is the constant stream of cultural micro changes effected by time that – stealthily but steadily – affect organizational strategy, change, and identity. Building on the work of Braudel in the discipline of history, we draw attention away from highly visible and clearly impactful external events to focus on the slowly evolving structures and cyclical processes that are less visible yet equally consequential in their effects on organizational identity.

Layers of time. In relation to previously theorized time horizons (Schultz & Hernes, 2020b), we propose to think of these temporal pluralities (duration, distant pasts and distant futures, momentous events, micro changes, cyclical processes, slowly changing cultural structures, etc.) as layers unfolding in time, overlapping and stacking in their effects on an organization's identity.

Instances of intentionality. Colliding and interfering with these layers of time and their effects is the intentionality of the organization's stakeholders, made manifest through rhetoric and strategy. However, intentionality thus understood is not monolithic and atemporal; rather, instances of intentionality are found at different points in time. Thinking of intentionality as instances is a useful conceptual tool, in that it helps foreground the temporal and plural aspects of intentionality.

Role of emotions or affect. Bound up with both the layers of time and the instances of intentionality is the changing role of emotions and affect. We cannot think of the role of time in organizations without taking into consideration the emotional and affective nature of temporal structures and changes, both big and small. In terms of intentionality, the role of emotions and affect in organizations has been richly theorized (Ashkanasy & Dorris, 2017; Elfenbein, 2006; Hareli & Rafaeli, 2008).

Short-lived and long-lived organizations. Some organizations are established with the intent that they survive indefinitely (intentionally long-lived organizations). Others, to the contrary, are founded with the intent that they serve a short-term purpose and therefore longevity is not desired or sought (intentionally short-lived organizations). Insofar as the organization's relationship with its own survival and longevity is intentional, we draw a distinction between short-lived and long-lived organizations. As a conceptual tool, this distinction helps us understand two modes of relating to time

(namely, either seeking longevity or dismissing it as a factor), which lead to different ways in which the instances of intentionality interfere with the layers of time.

Tensions. From a paradox studies perspective, and as a conceptual tool, tensions can help shed light on complexity as it unfolds over time in organizations, especially on the opportunities and challenges of complexity in organizational history (Smith & Simeone, 2017). Instead of regarding tensions as discrete, independent oppositions whose resolution is dependent on a simple, either/or decision or solution, tensions can be understood and investigated as an integral part of the complex fabric of organizational change and organizational history, acknowledging and elucidating the interdependent yet contradictory relationships between tensions over time (Smith & Simeone, 2017). For example, Smith and Lewis (2011) proposed a "dynamic equilibrium" model, by which oppositions shift and morph over time. Layers of history, periodizations, and narratives of the past play a central role in understanding tensions within and not despite the complexity and dynamic nature of organizational change.

Toward a theoretical model

Considering these conceptual foundations, we propose a theoretical model that shows the mechanisms by which time affects an organization's identity (Figure 3.3).

As suggested by the stacked semitransparent layers behind the label "Organization's identity" in Figure 3.3, organizational identity is not monolithic and static, but dynamic and (oftentimes imperceptibly) ever changing. The semitransparent layers that suggest the dynamic nature of organizational identity correspond to three overlapping aspects: intentionality and strategy (in red), sociocultural micro changes (in yellow), and the organization's relationship to its own longevity (in blue). This third layer dictates a categorical split into short-lived organizations (those lacking the intention of longevity) and long-lived organizations (those manifesting sustained intention of longevity). As such, the identity of a short-lived organization is shaped by the dynamic interplay of instances of strategy from within the organization, the effects of external sociocultural micro changes, and the organization's planned short-term life span. The identity of a long-lived organization is shaped by intraorganizational instances of strategy over (long stretches of) time, in conjunction with the effects of *longue durée* micro changes and the continuous effect of the organization's sustained intention of survival and longevity. Plural temporalities, understood in the Braudelian sense, play a major role in the organization's identity – first, in terms of the taxonomic distinction based on intentional longevity or lack thereof, and second, in terms of the layering of time-dependent factors.
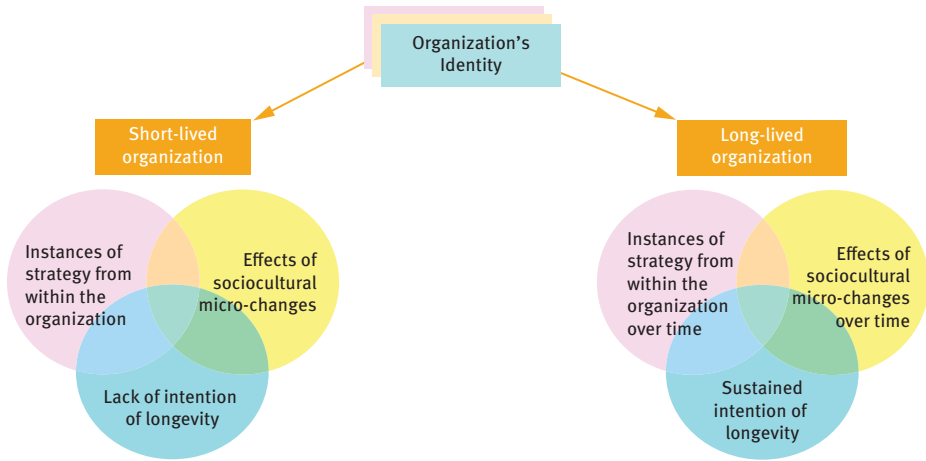
Figure 3.3: Theoretical model.

Contributions to future organizational identity theory and research

Drawing from the conceptual tools and the theoretical model proposed above, we offer a brief response to each of the three guiding questions for this chapter.

How does an organization's distant past influence its distant future? An organization's distant past is linked to its origin. The ways in which an organization typically envisions its distant future is necessarily as broad-stroked as when the organization was first taking shape. Both at the organization's inception and in exercises to envision the organization's distant future, these broad strokes attempt to define the organization's core identity. So, an organization's distant past and distant future have a dynamic common denominator, namely the intervening variable of the organization's identity, or more precisely, the ways in which this identity is constructed and narrated both within and outside of the organization.

What impact does this interplay of past and future have on organizational identity? As illustrated in our model, organizational identity is the result of overlapping layers. Because of the ever-changing nature of those layers, the result of their merging is, at least at a micro level, equally ever changing. Therefore, this interplay of past and future significantly affects the dynamic dimension of an organization's identity. For these layers to be actively in relation to one another, the organization is engaging both with its origin story and/or legacy on the one hand and with a future-oriented assessment and/or adjustment of its present *raison d'être* on the other. In both directions, a temporal understanding of distance is employed.

As distance is multivocal and multilayered, the nature of the layers could be explored. For example, do the layers evolve or dissipate over time? What are the

content and structure of the layers? Are these layers of space, cultures, networks, emotions or affective states, or paradigms that the organization experiences as it traverses over time interacting with internal and external environments? Are the layers framed in dualities, binaries, oppositions, or tensions, e.g., public versus private knowledge, visual versus hidden, or surface versus deep? How are the layers structured, and if there are relationships between the layers, what characterizes such relationships?

What role does intentionality play in this dynamic? Conceptualizing and strategizing an organization's future affects how the organization's future is (re)imagined. Inextricably linked to identity and memory, intentionality foregrounds the difference between the past and the ways in which the past is recorded, namely history (Jenkins, 2003). In other words, intentionality, as manifested in strategy and branding, plays a key role in the ways in which the past is remembered, forgotten, and reimagined in relation to the organization's identity and its desired future.

For short-lived organizations, intentionality is bound up with the struggle of initial differentiation. In the absence of an imagined long-term future, such organizations can be more heavily affected by external factors of their moment in time (as opposed to layers of time over longer stretches, allowing for strategic assessments and realignments).

Propositions for future organizational identity theory and research

Based on the above contributions, we suggest three propositions for future research. These propositions are grounded in two assumptions: (1) organizational identity and time are strategically constructed processes that are interrelated and (2) the relationship between organizational identity and time is multidimensional and multidirectional.

Proposition 1. Organizational identity is affected not only by pivotal moments, but also by the accumulation of hardly noticed shifts, all combined with the intentions of different stakeholders, in different socioeconomic and sociopolitical contexts. The past serves as a guide to create new perceptions or to sustain old perceptions of the organization; it is also used to inform actions that the organization should take in the future.

1a. As a secondary effect, the layering of instances of intentionality and sociocultural change, affected by time, significantly contributes to meaning making – both within and beyond the organization. The relationship between time and narratives of the past in organizations on the one hand and meaning making in relation to organizing and organizational identity, within and outside of the organization, on

the other hand, is an important area of theoretical and empirical investigation that warrants future research.

Proposition 2. The longer the timeline – e.g., drawing from a distant past and projecting into the distant future – the more complex the process, as it is more intricately linked to the chain of sociopolitical and sociocultural layers in which the organization is embedded. This chain is both multivocal and multilayered.

Proposition 3. Intentionality in short-lived organizations (those intentionally designed for a minimal future and with a brief past), in contrast to long-lived organizations (those intentionally designed for a distant future with experience of a distant past), influences the relationship between organizational identity and time.

These proposed directions of research can be ideally pursued through (1) a customized interdisciplinary theoretical framework and (2) empirical studies, in particular ones that research historical cases, either in and of themselves or in relation to other past or current cases, via a comparative lens that enables scholars to arrive at their findings by analyzing the effects of time in relation to different organizational models.

We elaborate on the first direction, namely that of developing customized interdisciplinary theoretical frameworks, below, and we explore methods and approaches for the second direction, namely empirical approaches and case studies, in Chapter 4.

Multidisciplinary theoretical frameworks: Challenges and opportunities

The advantages of a multidisciplinary focus on understanding and solving critical problems in practice have been highlighted and explored across disciplines including medicine, foreign policy, public policy, international studies, organizational studies, and others. In addition, the issues linked with multidisciplinary work have been highlighted, including the theoretical challenges related to epistemology and ontology as well as the associated methodological differences. The promise of multidisciplinary perspectives is often matched by the passion for our theoretical perspectives, as highlighted by Alford and Friedland (1985): "The adequacy of social theory limits our understanding of the potentialities of human history and our chances of realizing our dreams or avoiding our nightmares. For this reason theoretical differences evoke great passion" (p. xiv).

Alford and Friedland (1985) explored some of the key challenges in working across different theoretical perspectives, including assumptions inherent in worldviews and varying definitions of key concepts depending on the theoretical home. They explained that worldviews are defined by a set of assumptions within a theoretical perspective that defines the relationships between levels of analysis. As

political scientists, they noted that critical concepts such as *state* which are debated in political theories "must be located within the context of a theoretical perspective in which they are used to describe and explain phenomena they abstract from reality" (Alford & Friedland, 1985, p. 3). In referring to theoretical perspectives that define and theorize about *state*, they asserted that each perspective has much to offer in that "each theoretical perspective on the state has a home domain of description and explanation" (p. 3) and that the meaning of state "depends upon whether the vantage point for analysis is individuals, organizations or societies" (p. 3). Each perspective regards one of the levels as core and therefore interprets the other levels from the vantage point of the core level. The assumptions that guide the theoretical perspective and worldview set the parameters for the type of data collected and related methods of analysis. They highlighted that "what is *not* looked at – the 'silence' of the inquiry – can be as important as what is explicitly argued on the basis of evidence" (Alford & Friedland, 1985, p. 19).

This section begins with a brief recap of some of the primary challenges and advantages of multidisciplinary work in organizational studies and then focuses more specifically on the issues that have been noted in bridging history and organizational and management studies.

Organizational studies

The field of organizational studies has drawn from multiple disciplines and has integrated and expanded theories from these disciplines across levels of analysis. Most frequently, organizational studies has drawn from psychology and individual-level theorizing to explore and explain collective-level phenomenon. As noted by Ashforth, Schinoff, and Brickson (2020), organizations "are particularly likely targets of anthropomorphism because they are created and maintained by people and, thus, are rather easily and even reflexively construed as individuals writ large" (p. 32). As noted in earlier chapters, Walsh and Ungson (1991) warned about the risks in theorizing collective-level concepts such as organizational memory by building upon theories of human memory. Similarly, Schwandt (1997; Schwandt & Marquardt, 2000) proposed using collective-level theories from sociology and other similar social sciences to theorize collective-level concepts such as organizational learning rather than grounding theoretical models in individual-level learning theories. He proposed that these theories could serve as a bridge between individual and collective actions but cautioned about the potential problems in anthropomorphizing organizational learning, similar to Walsh's concerns relative to organizational memory. For example, Schwandt's model of organizational learning is grounded in social action theory (Parsons, 1951). The model assumes that organizational learning is "a system of actions, actors, symbols, and processes" (Schwandt, 1993, p. 8) and organizations are assumed to be "collective representations which are characterized by these mutually

dependent actions" (Schwandt & Marquardt, 2000, p. 43). Memory is a key concept in Schwandt's (1993, 1997) model of organizational learning, represented in the meaning and memory subsystem. Sociological theories of collective memory support the theoretical understanding and empirical research related to this subsystem versus drawing on psychological and biological theories of human memory.

History and organizational theory

Rowlinson et al. (2014) suggested that the "historic turn" has broadened and enhanced the dialogue between history and other humanities as well as across the social sciences, including organizational theory (p. 251). They also acknowledged that some of the outcomes of the integration of history and historical methods into other social sciences have been met with caution by historians. Rowlinson et al. (2014) referenced White (1987) in saying that "if we are going to turn to history, we need to have a clear idea of the kind of history we mean and whether it can accommodate our values as organizational theorists" (p. 251), and they asserted the importance of choosing a "theoretical stance" to inform our use of history and related research strategies or methods. "Without a theoretical stance, organization theorists may be seen as unwelcome tourists, 'wandering around the streets of the past' (White, 1987: 164) looking for a set of data" (Rowlinson et al., 2014, p. 251).

Since what has been heralded as the "historic turn" in organizational and management studies, as described in Chapter 2, history and historical methods have been recognized as increasingly important (Rowlinson et al., 2014, p. 251; Maclean, Clegg, et al., 2021). Maclean, Clegg, et al. (2021) proposed that "We are now entering a new phase in the establishment of historical organization studies as a distinctive methodological paradigm within the broad field of organization studies" (p. iii). Further, "by *historicizing* organizational research, it is argued, the contexts and the forces bearing upon organizations might be more fully recognized and analysis of organizational dynamics might be improved" (Maclean, Harvey, et al., 2021, p. 3).

The primary issues related to multidisciplinary theory and research integrating history and organizational studies have been identified and analyzed from multiple perspectives as well as retrospectives of the past 20 years since the "historic turn." The issues are most frequently related to the value of theory and how it is considered and used in history and organizational studies, epistemological and ontological differences and related research strategies, and organizational studies' emphasis on practice and the usefulness of theoretical understanding for practice.

The majority of these analyses and retrospectives on the historic turn in organizational studies carefully articulate and further explore the cautions and problems, yet strongly endorse the benefit, value, and significant promise of history and historical methods to inform organizational and management studies. Many scholars offer well-considered innovative frameworks (Rowlinson et al., 2014) regarding how to

effectively blend while preserving and, at times, enriching the integrity of the respective disciplines and their theoretical perspectives and methods.

As an example, Maclean, Harvey, et al. (2021) proposed "five principles of historical organization studies designed to promote a closer union between history and organization theory" (p. 5), including the core concept of dual integrity, which "underscores the importance of both historical veracity and conceptual rigour, extending mutual respect to history and organization studies in uniting the two, such that each discipline informs and enhances the other without either becoming the driver of the other" (p. 5). Rowlinson et al. (2014) stressed the critical importance of creating "greater reflexivity regarding the epistemological problem of representing the past; otherwise, history might be seen as merely a repository of ready-made data" (p. 250). They proposed three epistemological dualisms that "derive from historical theory to explain the relationship between history and organizational theory" (Rowlinson et al., 2014, p. 250) for scholars to consider. The dualisms focus on differences in explanation, evidence, and temporality. The dualisms offer a platform for scholars as they justify their "theoretical stance" and choice of research strategies in organizational history.

The fundamental ideas of dual integrity as well as dualisms in epistemologies are useful as scholars continue to enhance theorizing and research using history and historical methods in organizational studies. They offer the promise of embracing the plurality of ontological and epistemological differences across organizational theories as well as historical theories. Alford and Friedland (1985) concluded that observations about theory seem as relevant today as they were in the past. They offered a plea that seems germane to the value of the plurality of theoretical understandings and expressed the importance of theories as a guide:

> No theory seems to be able to adequately comprehend the conditions under which we might live, and no politics seems able to move toward them. In this desperate sense, theory is powerless. At no previous time has there been a moment when the powers of theory mattered so much as a guide to conscious, collective human action. For today, human life literally depends upon it.
> (Alford & Friedland, 1985, p. 443)

These discussions on how to engage in multidisciplinary theorizing and research extend the potential to acknowledge and respect the differences across disciplines and theoretical perspectives and methods and their potential usefulness in addressing the critical problems facing organizations and societies today. They also have the potential to meet the calls to combine rigor and relevance that have been recently published in different fields and industries, such as in museum education (American Alliance of Museums, 2014), and at the intersection of academia and practice (Mirvis et al., 2021). Rigor entails securing an understanding of the history and state of the field, research design practices, and prevalent positioning and assumptions for each discipline or perspective utilized or consulted in building an interdisciplinary conceptual framework. Relevance is to be checked and sought not only in terms of the

applicability and usefulness of one discipline or perspective to the overall project, but also in terms of its potential contribution to diversifying worldviews and positioning, its role in obscuring or illuminating the link between the study and the pressing questions of the moment, and its ability to bolster the eventual contribution of the study to practice.

Chapter 4
New Directions in Empirical Approaches in Organizational and Management History

Building on the state of the field and the theoretical foundations and advances outlined in the previous chapters, we dedicate this chapter to empirical approaches in organizational and management history, reviewing the use of historical case studies and scholarly practices of case selection, with recommendations for future research. We also explore new or underutilized methodological approaches, from an interdisciplinary perspective, focusing on microhistory, metahistory, and the methodological advantages of a combined micro- and meta-historical approach to case studies and empirical research in organizational and management history. Also included is a brief overview of other more frequently used methodological approaches – from historiography to social network analysis – outlining the tensions underlying their adoption into this field as well as opportunities for further methodological integration and use.

Historical case studies: Toward an interdisciplinary nexus

How is a historical case study different from a case study? Implicit in the term is a hybrid strategy that combines case study and history methods. For organizational and management studies, both methods are inexhaustive and problematic; combined, they can complement each other for a more rigorous methodological foundation. Both historical methods and case study research are often grounded in fixed points in time – the past and the present, respectively. A hybrid approach leads to a diachronic view of the case at hand and of organizations more broadly, enabling both a nuanced understanding of the complexity of the case over time and a more accurate and transparent pathway between the particularities of case research and the theoretical conclusions abstracted from the case.

We are using *diachronic* in the linguistic analysis sense of how something develops and evolves through time (Minegishi et al., 2011; Pütz & Mundt, 2018). The diachronic advantage of the historical case study was theorized in other fields, such as library and information science (Widdersheim, 2018). According to Widdersheim (2018), in the information science field:

> A new, blended research strategy is . . . needed to accomplish what history and case study alone cannot. . . . Historical case study is a new and valuable research design suitable for addressing questions related to change, continuity, development, and evolution. (p. 144)

Recent literature in organizational studies, too, has adopted the view that the scholarly benefit of the historical case study lies not only in the relation to the past, but also in

illuminating the interplay of different temporalities and how they affect organizational identity (Schultz & Hernes, 2020a). To analyze the interplay between the different temporalities of organizational strategy and identity, Schultz and Hernes developed a case study that they call longitudinal. Different time periods within the organization's history are defined as "temporal brackets" per Langley (Langley, 1999; Langley et al., 2013; Schultz & Hernes, 2020a). Temporal bracketing is used in qualitative research to identify often sequential units of organizational time bookended by "discontinuities in the temporal flow" (Langley et al., 2013, p. 7). Bracketing is integral to process studies, whose core objective is to identify how interactions and tensions drive change (Langley et al., 2013). As time is taken "seriously" in process studies (Langley et al., 2013, p. 1), the historical case study approach and the maturing field of organizational and management history more generally build on some of the foundational premises of process studies:

1. The necessity of both description (observation) and explanation (interpretation) of the case study – amounting to an in-depth understanding of the case at hand – to be able to accurately abstract from the particular or theorize from the case.
2. The centrality of the relational nature of events and activities in making sense of the case study over time and understanding patterns, progressions, and the effect of one unit of time over subsequent ones.

Based on this recent literature and the theoretical foundation presented here and in our previous chapters, we propose that at its best, the historical case study approach endeavors to understand the case (a) over time, (b) with an emphasis on the interplay and tension between and among different internal forces and units of time, and (c) in the context of the interplay between the organization, with its own relational tensions unfolding over time, on the one hand, and social, political, economic, and cultural changes outside of the organization on the other. This context is currently underemphasized in organizational and management history. We propose that a more substantive integration of considerations of extra-organizational context, informed by frameworks such as Braudel's (1949/2008), would construct more accurate and nuanced accounts and interpretations of historical cases, which would translate to more insightful findings, translatable to theoretical models via abstraction from the particular.

We have found it useful to identify and cluster similar concepts and paradigms across disciplines and fields – for example, notions of change in process studies, the systems perspective, and the microchange concept in social history (Figure 3.1) – not only to illuminate their conceptual overlap, but also to tease out their differences. Doing so can contribute significantly to solidifying a theoretical framework unique to the field of organizational and management studies.

Empirical research in organizational and management history: Underexplored and new methodological approaches

Microhistory

How can we overcome the epistemological crisis of history in organizational and management studies (OMS)? Recent literature acknowledges the elusiveness of the past, the incomplete and imperfect knowledge of facts (Bruce, 2020; Mills & Novicevic, 2020), and the role played by imagination or strategy in historiography, understood both as the writing of history and the study of historical writing. In fact, influential scholars like Jenkins (1991) and White (1973) have long established that the writing of history is, frequently and consequentially, the product of a combination of factual knowledge, analysis, and creativity coined as historical imagination. Thus defined, the relationship between the past and history amounts to an epistemological crisis.

We propose adapting a useful concept from the humanities – microhistory – for organizational and management history. We take the lead from recent work in the field that incorporates a microhistory approach, including that of Novicevic et al. (2019), Deal et al. (2018), and Mills (2017). Much of this work draws from Magnusson and Szijarto's (2013) approach to microhistory and at times integrates it with ANTi-history approaches (Novicevic et al., 2019). In one example, we analyzed a metahistory of the microhistory of an organization – Radio City Music Hall in New York City (Coman & Casey, 2020). This analysis highlighted how organizations change the narrative of their origin story at important junctures.

A term coined in the humanities in the 1970s, *microhistory* is widely considered a genre of history writing in which a small figure, organization, event, material object, or phenomenon becomes the focus of a historical account. By virtue of its reduced scale, as compared to regular "history" that concerns itself with complex events and phenomena at regional, national, and international scales, microhistory is presumed to be better for zooming in, as it were, and capturing the "textures" and "flavors" of history (Duke University, 2020). In doing so, microhistory also acknowledges and takes into account the importance of space and time (Cohen, 2017); how space is considered, described, or portrayed becomes an active "participant" in the story created. While an obvious advantage of microhistories is that they can "serve as correctives to grand historical narratives, big theories, and Big Data studies" (Duke University, 2020), the equally obvious downside is the problematic use of the writer's imagination in reconstructing, as it were, the colors and textures of the past – a challenge that microhistorians try to address by acknowledging their backgrounds, positions, experiences, and biases and how these influence their engagement with the focus or topic selected. This dynamic is at play with regular or macro-scale history writing, too, as noted by Rusen (2020) in his perspective of the difference between representation and interpretation, but with microhistory, the magnifying glass hovers over both

author and subject in ways that heighten the tension between fact and interpretation. As Cohen (2017) explained, "Microhistory, like any history, springs from an encounter between sources (papers, works of art, buildings, spaces, assorted other relics both human and natural) and their interpreters' own later times – with their hermeneutical practices and habits of exposition" (p. 54).

Microhistory can also be understood, and used, as a methodological approach in social history, given that its reduced scale promises to offer insight into the lived experience of the past, a notion at the core of social history (Gilbert, 1990; Mitchell, 2000). Cohen (2017) noted that microhistory isn't a field of history but instead is a method or a practice. Hallmarks of microhistory as a practice include "close reading, looking for nuances in words, actions, and material conditions" (Cohen, 2017, p. 54), and investigating and describing the interconnectedness of smaller events for larger structures and events. Microhistories acknowledge the incompleteness of our understanding of events based on both the incompleteness of records or accounts as well as the distance in time between the events and the histories. These present challenges in interpretation and representation. For example, a microhistory of pardon letters – petitions sent in the 15th century by the condemned to the monarchs in the Low Countries – analyzed the personal histories of those who wrote these letters and their families, weaving them together to shed light on the social structures and conditions of 15th-century Europe (Arnade & Prevenier, 2015). In this case, the scale was reduced to focus on one type of letter to discover how it was embedded in larger historical contexts. As such, microhistories are concerned with illuminating the "thick connectedness of things" (Cohen, 2017, p. 54) and the use of rhetoric in reconstructions of the past. For example, in the microhistory of pardon letters, Arnade and Prevenier (2015) explored the distorted nature of historical truths, given that the letters were crafted to persuade their readers. Microhistories invite a dialogue with the reader, engaging with the reader's background as well as the author's. These histories also engage through awakening readers "to the serpentine coils of the act of reading" (Cohen, 2017, p. 56). Cohen (2017) highlighted the significant and reciprocal relationship between meta- and microhistory, offering that the answer is to "treasure the power of the small to clarify the large, and vice versa" (p. 68).

Microhistory's relationship with the *longue durée* is complex and worth exploring. The short span of microhistorical boundaries can be understood as a complement to the *longue durée* approach to history. In fact, the Italian methodology of *micro-historia* was developed largely as a reaction to the multiple layers of *longue durée* history as established by Fernand Braudel and the French Annales School (Tomich, 2011). As Tomich (2011) argued, despite the tension between the microhistorical and *longue durée* approaches, they are nonetheless intrinsically linked, as they are both premised on a plural and multilayered understanding of time, albeit at different durations and scales.

Carlo Ginzburg, Edoardo Grendi, Giovanni Levi, and Carlo Poni are some of the most prominent historians in the Italian microhistory community, whose work was developed as a result of a critical examination of the Annales methodologies,

especially Braudel's work on *longue durée* (Tomich, 2011). However, the Italian *micro-historia* as methodology was intentionally developed in dialogue with multiple existing approaches, revising them to be applicable to reduced scales and time spans (Tomich, 2011). Ginzburg's approach to microhistory is predicated on a less positivist, self-reflective perspective – an acknowledged awareness of the historian's positionality in the research and writing of microhistory (Jacobson Schutte, 1976). It is worth mentioning that this perspective was not always present in Ginzburg's work, especially his early literature, where archival records were often used as literal, unfiltered sources and windows into the past (Jacobson Schutte, 1976). Also in his early scholarship, Ginzburg wrote about methodological approaches to art history, showing the ability to become fluent in a discipline that was not his home field and writing with precision and clarity – qualities that would characterize microhistorical work at its best (Jacobson Schutte, 1976). Besides the (unevenly applied) self-reflective lens, microhistory in this scholarly tradition entails a careful consideration of how to extend or apply historical findings from the individual to the collective level and from the singular instance to its broader, if local, context.

Metahistory

History as narrative and the historical imagination are key features of theories of metahistory. Jenkins (1991), a historiographer, proposed that history is in essence a story or narrative composed through the views or lens of the individual historian and influenced by the conditions or context at the time it is created. Although histories of a phenomenon or period are constrained by historical evidence available at the time the history is composed, Jenkins noted that which events and evidence are chosen and how the traces or evidence are structured into a coherent narrative reflect the meaning attributed by the historian.

White's 1973 book, *Metahistory,* is credited with creating the "linguistic turn" in historiography (Stovall, 2018). White proposed history as a creative as well as scientific process. He contended that history was literature and that for history to move forward as a discipline, historians would need to elevate the art of writing and crafting narratives that provide meaning to the present time. White (1984) focused on the critical role of imagination in creating narratives:

> How else can any "past," which is by definition comprised of events, processes, structures, and so forth that are considered to be no longer perceivable, be represented in either consciousness or discourse except in an "imaginary" way? Is it not possible that the question of narrative in any discussion of historical theory is always finally about the function of imagination in the production of a specifically human truth? (p. 33)

White asserted that the problem with historical studies is the lack of theoretical self-awareness. He noted, "Unlike real sciences and for that matter real poetry, they

fail to take their own procedures as an object of theoretical self-examination" (Sklokin & White, 2012).

Rowlinson (2004) and others (Mills & Novicevic, 2020) characterized White's contribution as a narrative historian and as one who considered history as a creative process. They noted that he highlighted the importance of the social and political forces that influence what phenomena are selected as the focus of the history, how the story is created, and how the facts are identified. It's more about how the facts are crafted into a story. Durepos, Mills, and McLaren (2020) cited White (1973) in describing the tools that are employed in constructing history, such as "theoretical frameworks, methodologies, and modes of emplotment" (p. 281). Other tools include writing styles and techniques, which are also influenced by the era or time period of the author as well as cultural norms.

Rusen (2020) noted that White's metahistory "turned the shift from rhetoric to science in its contrary direction: a new turn to rhetoric was proclaimed" (p. 96), yet suggested that this surfaced an "unanswered question as to how research methodology should be treated" (p. 96). Rusen (2020) highlighted the methodological issues in metahistory, with a focus on the critical differences between interpretation and representation, suggesting that a perspective of metahistory is needed that "gives us full insight into its complexity; it may overcome the one-sidedness of methodological rationality, on the one hand, and poetic aestheticism, on the other" (p. 97).

Metahistory and microhistory complement each other as methods in empirical work, in that one's disadvantage is the other's advantage. Specifically, the ability of the microhistorical approach to illuminate the impact of historical contexts that often go unnoticed helps course-correct the overemphasis on rhetoric and power often seen with the metahistorical approach. A combination of meta and micro approaches to history can provide a unique perspective in organizational studies, especially in terms of utilizing history to shed light on organizational identity and change.

Other approaches

Recently adopted and currently explored directions in the discipline of history – as well as those disciplines that are related to history by virtue of the centrality of time in their methods and analysis, such as art history – warrant consideration for adoption and adaptation into OMS. Since OMS is an interdisciplinary field in the process of crystallizing its own framework, we propose that an active review of the latest methods in the discipline of history by OMS scholars would help avoid the pitfall of sedimenting foundations that are derived from theories and methods rendered obsolete by contemporary research. The trajectories of other fields support this recommendation. To offer an example from art history, hagiography and historiography – essentially intertwined in premodern scholarship (Herrick, 2019) – were the primary, if not the only, historical methods used in art historical literature, harkening back to the model set by

J. J. Wincklemann (1717–1768). Wincklemannian "art historiography" marginalized texts and prioritized artifacts and images as the object of art historical analysis (Décultot, 2019), hindering or delaying the critical adoption of text-based approaches to history, such as those developed by Ricoeur or White.

Recent and new approaches in the discipline of history include historical social network analysis (Herfeld & Doehne, 2018; Wetherell, 1999); space and spatial processes (Deane et al., 1999; Jerram, 2013); environmental history (Quenet, 2018; Rotherham, 2011); materiality and the history of things (Bennett & Joyce, 2010; Gaskell, 2018); gender studies (Downs, 2018; Thom, 2008); postcolonialism (Majumdar, 2018; Zachariah, 2013); and perception, emotions, and neurohistory (Boddice, 2018; Hatfield, 2001; Nagy, 2018). These approaches warrant investigation and adaptation for use in future OMS research and literature.

A historical angle or even an ampler "historical turn" can be observed in disciplines outside of traditionally time-based fields. Similar to the historical turn in OMS, other disciplines such as linguistics, museum and library science, medical studies, legal studies, and science and technology have seen their own historical turns. What shape has the historical turn taken in these fields? Which historical approaches are most successful and why? Are there historical methods and conceptualizations of history in such fields that can inform future approaches in organizational and management history? For example, the literature on historical perspectives on nursing, growing since the 1960s, has been increasingly used to bridge theory and practice by mining nursing history for organizational patterns and breakthroughs that can inform the future of nursing practice (Boschma et al., 2009; Fasoli, 2010; Lima et al., 2020; Viadas, 2015). This example shows how organizational and management history, too, can be relevant to practice (management, strategy, organizational leadership). From a metahistorical perspective, relevance to practice was paramount to the foundational literature of organizational and management history, as reviewed in Chapter 2.

In Table 4.1, we offer the reader an annotated selection of other foundational references on methods, from multiple disciplines, as a tool for future scholarship in organizational and management history.

Table 4.1: Annotated references on methods from multiple perspectives and disciplines.

Citation	Notes
Glaser, B., & Strauss, A. (1967). *The discovery of grounded theory: Strategies for qualitative research*. Aldine Publishing.	This groundbreaking classic – the original statement about grounded theory – challenged mid-century positivist assumptions about research and asserted that theories could be developed from qualitative research through a systematic analysis process with its own logic. This text offers practical guidance for these data analysis strategies.

Table 4.1 (continued)

Citation	Notes
Van Maanen, J. (1988). *Tales of the field. On writing ethnography.* The University of Chicago Press.	Van Maanen provides a guide to ethnography and the various ways it can be represented across disciplines. The footnotes offer valuable references to seminal scholars who support these representations. Van Maanen emphasizes the importance of researchers' understanding their own assumptions and being aware of selecting the voice that is most appropriate for the context being represented. Van Maanen offers practical examples from his own research, including his classic studies of police and their culture.
Geertz, C. (1973). *The interpretation of cultures.* Basic Books.	This is Geertz's definitive work on culture. As a cultural anthropologist, Geertz is known as a founder of interpretive anthropology. In this text, Geertz theorizes about culture, the significance of symbols and meaning making, the role of the researcher, and methods appropriate for studying culture. Geertz's influence through these ideas spanned the social sciences and changed the direction in many fields.
Husserl, E. (1931). *Ideas: General Introduction to Pure Phenomenology.* Translated by W. R. Boyce Gibson. New York: Macmillan Company.	Phenomenological research is widely used across the social and health sciences, particularly in sociology, psychology, education, and nursing (Creswell, 2013). Phenomenological studies focus on common lived experience or the essence or nature of the experience of a phenomenon. It reduces the experience to a description of the "universal essence" (Creswell, 2013, p. 76). Phenomenology, often considered one of the most significant movements in 20th century philosophy, draws on the work of Husserl (1931). This text was significant in that it represents the evolution and broadening of Husserl's ideas relative to phenomenology and the nature of consciousness.
Ragin, C. C., & Becker, H. S. (Eds.). (1992). *What is a case? Exploring the foundations of social inquiry.* Cambridge University Press.	This text explores the question of what constitutes a case in social science research and the many variations depending on the discipline. Ragin and Becker address the many questions that stem from this basic issue, including how the case and its definition can influence the framing of the problem, the research questions that emerge, and the data collection methods that are employed.

Table 4.1 (continued)

Citation	Notes
Berger, P. L., & Luckmann, T. (1966). *The social construction of reality. A treatise in the sociology of knowledge*. Doubleday.	Berger and Luckmann expound on their premise that "reality is socially constructed and the sociology of knowledge must analyze the processes in which this occurs. The key terms in these contentions are 'reality' and 'knowledge,' terms that are not only current in everyday speech but have behind them a long tradition of philosophical inquiry" (p. 2). In this text, they explore the processes people create to construct their reality through language, actions, interactions, and meaning making using their experiences and inherited histories. In addition, they theorize about how these inherited histories influence how habits and routines become institutionalized and legitimated across generations.

Case selection: Underexplored fields and industries

A diverse range of time periods, industries, and organizational models across case studies can contribute significantly to organizational and management history as it matures as a field. Considering the multiple taxonomies to which one can refer for case selection – typical cases, index cases, longitudinal cases, etc. (Gerring & Cojocaru, 2016) – what criteria should scholars of organizational and management history prioritize, and what types of cases can the field contribute to OMS more generally?

One answer, we propose, is an intentional prioritization of underexplored cases, fields, and industries, such as women-owned businesses, organizations in understudied economies, organizations from the cultural industries (e.g., cultural heritage, traditional craftsmanship, conservation and restoration), and organizations from the creative industries (e.g., arts, architecture and design, advertising, film, fashion, gastronomy). These underexplored pools of cases would foreground contexts and puzzles that are markedly different from those of typically explored cases such as corporations, organizations in Europe and North America, and the financial, service, and manufacturing sectors. This direction would not only increase the plurality of perspectives in the field, but it would also help create an archive of studied cases that would be more widely representative and would enrich the breadth and relevance of the field itself.

A few examples of empirical research directions that would benefit from cases drawn from these underexplored fields and industries include understanding different cultural contexts and their roles in shaping organizational change (Fischer et al., 2014), especially historically and over time; exploring histories of creativity and innovation at the organizational level (Jones & Maoret, 2018); and investigating legacy (Ravasi & Schultz, 2006; Walsh & Glynn, 2008), especially the tension between

heritage preservation and transformation at different points in an organization's history. Shaping our social and economic realities, cultural fields and creative industries are often recategorized from within their own fields, per changing societal norms, or by scholars, and as such lend themselves to historical approaches that can illuminate changes in taxonomy and identity at the level of individual organizations, fields, and larger sociopolitical structures (Jones & Maoret, 2018). As such, cases drawn from cultural fields and creative industries would help diversify the empirical scope of research in organizational and management history, as well as explore essential questions at the intersection of time, space, and agency, with great potential for future research in organizational and management history.

Conclusion

In this chapter, we reviewed approaches to empirical research in organizational and management history, exploring the usefulness of historical case studies in empirical research in organizational studies more broadly; discussing methodological lenses for empirical research including microhistory and metahistory; and investigating current practices and future research opportunities in terms of case selection for empirical research in this field. We make three propositions:

a. Historical case studies can inform future research in OMS as opportunities to explore cases over time, to identify tensions within the organization at different points in the organization's history, and to elucidate agentic forces that shape the case from both within the organization and beyond the organization, thereby integrating an analysis of broader contexts.

b. An integrated methodological approach to empirical research entailing both micro and metalenses to the historical case study can help shed light on often underexplored historical contexts and on equally unnoticed micro changes that contribute significantly to more visible shifts in an organization's direction. The micro lens, combined with the metahistorical methodological approach, can also help nuance what can become an overemphasis on rhetoric when regarding history as a strategic narrative.

c. Drawing cases from underexplored fields and industries such as the cultural sector or creative industries can help increase the range and richness of empirical work in organizational and management history, and in organizational studies more broadly. Cultural and creative fields, for example, are especially affected by extraorganizational, sociocultural changes over time, and as such, they can help new scholarship in organizational and management history embrace complexity and adopt cross-disciplinary, nuanced approaches to empirical research in the field.

The following chapter builds on the conceptual and methodological foundations outlined thus far to explore a growing and timely subfield in organizational and management history, pertaining to hybrid and purpose-driven organizations, and to review extant literature and opportunities for future research on the dynamic interplay of legacy and change in organizations.

Chapter 5
Legacy and Change in Purpose-Driven Organizations

Organizations with a long or significant history often find that their legacy is at odds with the realities of the present or the directions they envision for the future (Hatch & Schultz, 2017; Kroeze & Keulen, 2013). Is that tension particularly stringent in purpose-driven organizations such as nonprofit entities, federal agencies, organizations in the creative industries, and social enterprises? For organizations whose purpose is not primarily monetary, who are dedicated to something bigger than the products or services they offer, the purpose serves as the organization's *raison d'être*; as such, when aspects of the purpose change or the emphasis shifts from one component of the organization's purpose to another, the organization's identity is threatened, and legacy becomes an obstacle to overcome in order to effect change.

However, some organizations seek ways to leverage their legacy *for* change, i.e., for efforts to reimagine, understand, and enact their organizational identity. For example, Radio City Music Hall built on its radio origins to emphasize radio-related qualities – public, inexpensive, accessible – while forgoing radio for other channels and outputs (live performance, TV, digital streaming) (Coman & Casey, 2020). To offer another example, in a controversial move, instead of leaving a Confederate statue in storage after its removal from a public park, the Houston Museum of African American Culture put it on display as an opportunity for artists and communities to engage the public in a challenging but generative conversation (Davis-Marks, 2020).

Imagining a different future that does not erase the identity and legacy of an organization but utilizes them as scaffolding for realizing the organization's new directions – whether an entirely new vision or, more often, a reimagination of its current vision – is an attractive proposition, but there are many limitations. From legal restrictions (e.g., clauses preventing change in charitable donations and bequests) to optics (e.g., a clash between legacy and envisioned future that is so significant that connecting the two appears insincere), the challenges at the intersection of legacy and change are as great as the opportunities. Whether a challenge or an opportunity, the relation between an organization's past and its future is vital for its present (Brunninge, 2009; Bucheli & Wadhwani, 2014; Coman & Casey, 2020; Casey & Olivera, 2011; Coraiola et al., 2015).

In this chapter, we explore how purpose-driven organizations imagine constructive models for navigating this fundamental tension. We review multidisciplinary literature that theorizes the relationship between legacy and organizational identity and change. We then explore the intersection of legacy and change in long-lived, purpose-driven organizations, specifically investigating how legacy can be leveraged successfully for organizational change that contributes to societal well-

being. Lastly, we identify opportunities for future research on the interplay between legacy, organizational change, and socially oriented purpose, such as expanding this direction of research to corporations; doing empirical research on legacy and change in hybrid forms of organizing; and applying this lens to contribute to literature on imagined futures at the intersection of organizations and larger societal structures.

Legacy in organizational studies

As noted earlier in this text, legacy in organizations is considered by some as a "bridging concept" (Suddaby, 2016), in that it has the potential to address or resolve some of the ontological and epistemological disciplinary differences between organizational theory and history. Understanding legacy from a multidisciplinary approach and addressing the potential tensions between the past and the creation of new futures for organizations have important implications for organizations as they innovate and change, particularly in understudied yet critical contexts such as purpose-driven organizations.

There has been limited research on legacy in organizational studies and, for the most part, the concept has been theorized and studied in relationship to other concepts such as organizational identity (Ravasi et al., 2019; Walsh & Glynn, 2008), strategy (Suddaby, 2016), and the impact or role of leaders and founders (Ogbanna & Harris, 2001; Schein, 2010) on organizational actions. Different definitions have been employed and, at times, the term has been referenced without offering a specific definition or theoretical foundation for the discussion. For example, Ogbanna and Harris (2001) conceptualized strategic legacy as "the enduring influence of the initial strategy of the founder of an organization over the actions of successive strategic decisionmakers" (p. 14). This influence emerges in policies, histories, and values in organizations. Their research also suggested that there can be a "differentiation in the character or nature of the strategic legacy of the founder" (Ogbanna & Harris, 2001, p. 28) given different internal and external environmental circumstances and then "a strategic legacy may vary in terms of focus, content and manner of communication" (p. 28). In considering future research, the authors noted the opportunity this offers "for the cultural and strategic deconstruction of an organization's history in a manner which reveals the overlay of different legacies and dynasties, each of which may vary in the manner of communication" (p. 28).

Legacy has been researched extensively in relationship to organizational identity. For example, Ravasi et al. (2019) acknowledged the importance of understanding legacy and tradition in relationship to organizational identity processes over time. In their research on corporate museums, legacy was intertwined with material memory, as the latter provided cues in the process of meaning making of organizational members. Their research also found that organizational members serving in

many different roles in addition to senior leaders used material memory and legacy processes to inspire innovation or preservation (p. 1550). Their informants emphasized the need to preserve legacies and traditions through experiences that included the mind, body, and emotions of individuals.

Suddaby (2016) also described organizational legacy: "Organizational legacy focuses attention on particular and localized elements of the history of an individual, an organization, or an economic region that explain unique elements of competitive behavior," and these "unique experiences of local regions construct distinctive cultural and economic histories – legacies – that imprint local organizations and individual entrepreneurs with historically specific identities and world views that can inhibit or enhance economic opportunity" (p. 55).

Walsh and Glynn (2008) theorized the relationship between organizational identity and legacy, differentiating between organizations that are ongoing, i.e., living organizational identity, and those that no longer exist, i.e., legacy organizational identity. They defined legacy organizational identity as the "collective claim by members of a defunct organization to 'who we were as an organization'" (p. 262). They theorized that legacy organizational identity is grounded in the core identity claims from the past, is "enacted regularly through collectively shared activities and artifacts" (p. 262), and emerges from critical events in the organization's history such as deaths and major restructurings. Legacy in organizational identity has also been the foundation for informal rituals or more formal traditions even after organizations are acquired or merge with other organizations.

Walsh and Glynn (2008) noted that legacy has received some attention in organizational research. In this work, legacy is often considered as an imprint from key individuals or roles in an organization's past, such as leaders or founders. The imprint carries forward through different processes to impact the present and future. This collective process can be intentional (Glynn, 2008) or unintentional and can live on beyond the lifespan of the organization. The influence of legacy on collective action has been studied in connection to events such as planning for the Olympic Games, where the intent is to leave a beneficial and sustainable legacy in the city that hosts the games (Glynn, 2008, p. 1118). The mission drives the planning and the events connected to the Olympics, as stated by the London Organising Committee of the Olympic Games (Glynn, 2008, p. 1118). "Most Olympic Cities try to reap the benefits from their time on the world stage to build a lasting legacy of social, economic, cultural, educational and reputational benefits to the community such as sustainability, economic development, urban revitalization, tourism, residential quality of life, or urban image" (Glynn, 2008, p. 1123).

Glynn's (2008) study of the Olympics focused on the "level of the local geographic community" and explored how the "city character and traditions enable both persistence and change in institutional elements even when potentially disruptive events occur" (p. 1117). Legacy was a core component of the study, in that it impacted planning and staging of the Olympics. In analyzing data from 17 host cities, Glynn

(2008) found that most host cities were successful in creating some part of a positive and sustainable legacy through "both relational and symbolic system elements in the reconfiguration of cities" (p. 1126). Glynn primarily drew from institutional theory and in doing so did not specifically define legacy or explore the theoretical underpinnings of the term.

Although much of the organizational research on legacy such as that of Walsh and Glynn (2008), Ravasi et al. (2019), and Ogbanna and Harris (2001) has significant implications for organizations in relationship to how the past is used to understand and determine present and future actions such as strategic innovation, the practical implications of legacy are rarely if ever discussed. Ogbanna and Harris (2001) briefly mentioned that managers need to be aware of the potential impact of the strategic legacy (p. 29), particularly in its impact on their ability to both mask or be aware of strategic choices, yet the ideas were not pursued in depth.

In conclusion, legacy has been theorized and researched to some degree in organizational studies, yet this work rarely draws from an in-depth analysis of the theory and research on legacy in other disciplines such as history, sociology, and anthropology. Some of the early work on legacy connects it to related ideas about imprints left by founders in organizations and those who might be the first to hold newly created roles (Burton & Beckman, 2007). As Burton and Beckman (2007) theorized about the influence of these individuals, they drew from Stinchcombe's (1965) ideas about organizational imprinting. Imprinting has captured the imagination and served to attract scholars in different areas of organizational studies, including institutional theory, network analysis, and organizational ecology (Marquis & Tilcsik, 2013), and across multiple levels of analysis, from the individual to the institution. This connection to imprinting has continued as a path forward for later work on legacy, including in relationship to family businesses and intergenerational transfer of knowledge and practices.

A humanities lens on legacy and organizations

Studies in history and art history often refer to "legacy" not only as what is remembered about an individual, an organization, or a movement, but also as what continues to have an effect in its afterlife. For example, Philip Melanchthon's *Carion's Chronicle* (1532), a Protestant history of the world from creation to the 16th century, is regarded as his "legacy" for two interrelated reasons, namely, that it is widely remembered and that it has continued to be consequential past the moment of its publication and even long past the death of its author (Lotito, 2019). In the field of history, *legacy* also often has a positive connotation; in other words, implicit in the use of the term is that the consequential aspect that makes it a legacy is somehow beneficial (to the memory of the originating individual or organization, to the relevant field or industry, or to society at large). For example, on the one hand, Melanchthon's efforts helped

raise the profile of the discipline of history in education, eventually leading to its inclusion in the German university curriculum, regarded by later historians as a positive aspect of what he left behind; on the other hand, his implication in interconfessional tensions and the lack of clarity around his identity as a scholar are regarded as negative aspects that subsequent generations remembered as well (Lotito, 2019). Considering both sets of aspects, Lotito referred to Melanchthon as having a "mixed legacy" (p. 6), thereby nuancing or complicating what would have otherwise been understood as entirely or overwhelmingly positive.

Legacies are narratives that reflect the perspectives and intentions of those who use them in discourse or action, much like histories (Jenkins, 1991; White, 1987). Regarded as narratives, legacies can be studied through a temporal lens. As sketched in the legacy periodization in Figure 5.1, the facts described as someone's legacy (or as an organization's legacy) – element "A" in the figure – necessarily predate the formation of the legacy narrative and are the foundation upon which the legacy narrative is constructed. The milestone that segments off the period to which the legacy refers – element "B" in the figure – is often the death of the individual, the moment of completion such as a date of creation or of publication, or the conclusion of a phase such as a reign, directorship, change of ownership, etc. However, this milestone may also be the moment when that history is remembered, which can occur years, decades, or centuries later. For example, what the art world remembers as Vincent van Gogh's legacy did not commence when the artist died in 1890 but when art critics and collectors began to bring van Gogh's life and oeuvre to the limelight in the 1910s and 1920s (Bailey, 2021). The lifespan of the legacy begins after this milestone and is characterized both by the survival and longevity of the narrative and by the effect of the narrative during this period, marked as "C" in the figure.
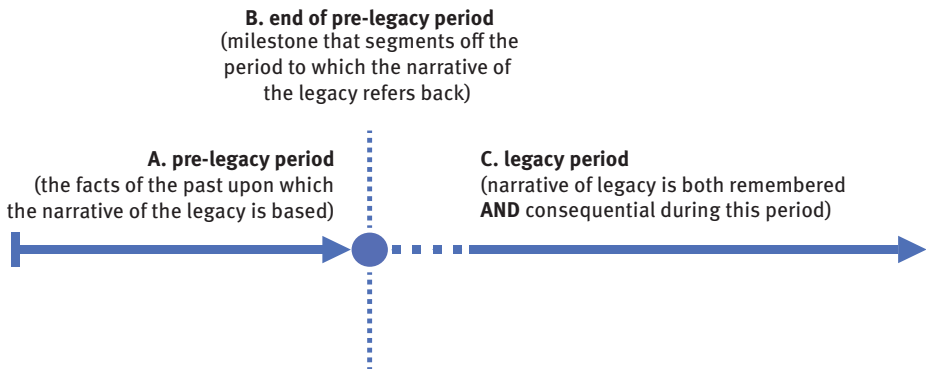
Figure 5.1: Periodization of legacy as narrative.

In the case of van Gogh, for example, his legacy is not only mentioned extensively in the art world and in the field of art history, but is also known to have played a

significant role in shaping new art and new thinking about art, either building on or reacting against the main tenets of his legacy narrative (e.g., bold expression, inner turmoil, etc.). Van Gogh's legacy, as the narrative of the rediscovered post-Impressionist genius, now has its own legacy, namely the power of the art world to catapult an artist's life and oeuvre to unprecedented heights of fame and monetary value, which in turn has solidified self-perpetuating status hierarchies (Cattani et al., 2017; Merton, 1968; Podolny, 2005).

In some cases, and from a *longue durée* perspective, the period of legacy – "C" in Figure 5.1 – is not a linear and monolithic phase, but a multilayered history during which the legacy is altered, reinvented, and repurposed, leading to new ideas and phenomena (Figure 5.2). A creative example comes from the unconventional art historian Aby Warburg and his *Mnemosyne Atlas* (1924–1929, unfinished), in which he mapped how "antiquity" was perceived, interpreted, and utilized in a centuries-long history of images, thereby creating a visual representation of what he regarded as the legacy of antiquity. Warburg's *Atlas* was subsequently cited, interpreted, and misinterpreted over decades of art history literature, amounting to the legacy of Warburg's vision of the legacy of antiquity (Didi-Huberman, 2002).

B. end of pre-legacy period
(milestone that segments off the period to which the narrative of the legacy refers back)

A. pre-legacy period
(the facts of the past upon which the narrative of the legacy is based)

C. multi-layered legacy period
(legacy is remembered, consequential, and dynamic, as the legacy narrative is altered and reinvented)
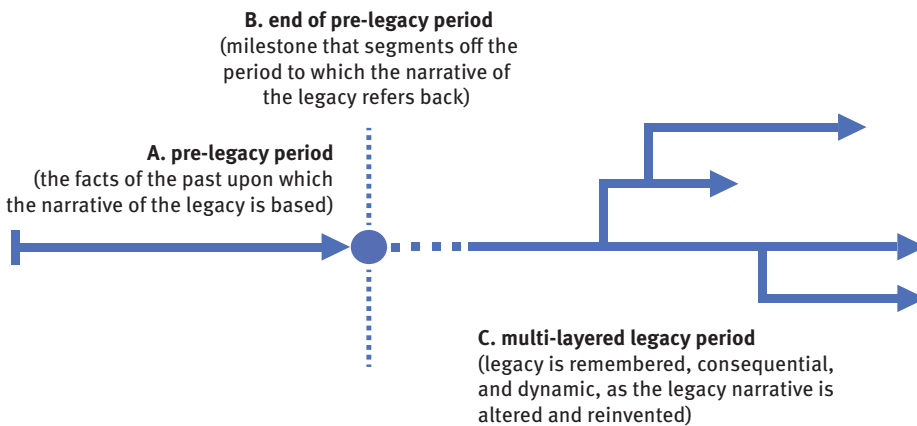
Figure 5.2: Multilayered, long-lived legacy periodization.

From an organizational perspective, these insights from the humanities raise questions about organizational legacy as narrative; the definition of organizational legacy as a narrative about the organization's past that persists in the present and influences the present and future of the organization; and the many lives that the legacy narrative itself can have during its active period ("C" in Figures 5.1 and 5.2), altering courses of events and being altered by agentic forces from within and beyond the organization.

What we refer to as *legacy* resonates with similar concepts such as *history, intergenerational transmission, heritage, imprinting,* and *reputation.* Recognizing the similarities

among these terms is as valuable as discerning the differences, rooted in the conceptual frameworks and literatures that use these respective terms. Unlike *history, legacy* emphasizes the transmission aspect in the effect that the past can have on the present and the future. *Intergenerational transmission*, too, focuses on this aspect but is more narrowly concerned with the passing of the baton, as it were, from one generation to the next, in a more linear and direct way than the broader possibilities encompassed by legacy. *Heritage* reflects both the accumulation of layers of time in "history" and the complex transmissional aspect of legacy, but it typically refers to larger sociocultural contexts, beyond an organizational scope. *Imprinting* is more closely related to legacy and intergenerational transmission, but it refers more specifically to the effect of founders, trailblazers, and the first agents to occupy new organizational roles on organizational aspects that they shaped, as well as on the organization as a whole. *Reputation* is the most distant in this semantic family, as it captures the effect that knowledge about the organization can have on the organization's identity and pathways to change; however, it is not predicated on time, the past, and history, as these aspects can be subsumed to a more dynamic reputational picture. We have chosen *legacy* to refer to these interrelated phenomena in order to emphasize (a) the relationship to time (and especially narratives of the past), (b) the complex ways in which identity and reputational aspects get passed down or continue to have an effect on the organization, and (c) the multivocal nature of the agentic forces that contribute to shaping and reshaping organizational history and identity.

The relationship between legacy and social purpose in purpose-driven organizations

There is a growing literature and renewed interest in the role of purpose in organizations and how it can be theorized in new ways in the context of ever-changing critical global issues. At times, the focus is on the role of purpose in for-profit organizations beyond the goal of maximizing profit and how purpose has been framed and explored in organizational and management studies. At other times, the analysis includes additional ways purpose is expressed by organizations, particularly with an increased interest in the role of the organization in addressing or impacting specific social issues that may or may not be directly related to the mission and business and yet become an articulated and actionable purpose expressed in the purpose and goals of the organization. Other literature has explored social purpose and organizing more broadly, including social entrepreneurship, social enterprises, social impact, and hybrid social ventures that combine for-profit and not-for-profit models.

In this section, our interest is in the role of legacy at the intersection of social purpose and organizing. How can legacy hinder or advance an organization's social purpose? And how do legacy narratives affect changes in organizational mission? The section that follows reviews some of the recent work on the role of purpose in

organizations with an emphasis on the social aspects of this work. In addition, it explores the relatively limited consideration of the role of legacy in how purpose is assumed, articulated, and changes in different types of organizations, particularly purpose-driven organizations founded on a unique social mission or goal.

Purpose in organizational studies

Purpose is an often-used term in organizational studies and in practice. It is frequently used to explain an organization's *raison d'être* to internal and external shareholders and can also be a means to legitimate organizational goals and related actions in the past, present, or future. Purpose is frequently used as a synonym for organizational vision or mission and has not been differentiated from these terms in most theoretical or empirical work. An organization's purpose has been linked to positive outcomes such as employee engagement, recruitment and retention, organizational and individual performance, and brand recognition. It's also been an ongoing question in the literature regarding why organizations care about stating a purpose beyond maximizing profits, the potential financial costs involved in doing so, and why employees care about an organization's expressed higher purpose if it is not directly connected to their work or profession (Henderson & Van der Steen, 2015). It has been speculated that an organization's statement of a higher purpose can increase profits in part through employees' increased engagement and performance. The positive impact of an expressed higher purpose was also supported by Serafeim (2018); his analysis indicated that "an increasing number of investors are therefore integrating environmental, social, and governance (ESG) data when they make investment decisions. Research has already shown that firms improving their performance in material ESG dimensions subsequently outperform their peers" (p. 3).

Yet Clegg et al. (2021) asserted that the literature related to organizational purpose and positive outcomes "is a contested terrain, given persistent debates on the crisis of confidence in organizations and the nature of shareholder capitalism (Child, 2002). Shareholder value is pitted against wider social purposes" (p. 2). They proposed the value of theorizing purpose from other perspectives on organizations, i.e., organizations as expressive systems. Other scholars recognized the importance for organizations to incorporate a social purpose in their mission that links to social, economic, and ecological issues in their environments yet also acknowledged that there is not one commonly accepted definition of what it means to be a "purpose-driven" or "purpose-led" organization (Von Ahsen & Gauch, 2021), where purpose refers to addressing social objectives.

In referring to organizational purpose in for-profit firms, George et al. (2021) noted that "purpose is a concept often used in managerial communities to signal and define a firm's benevolent and pluralistic approach to its stakeholders beyond its focus on shareholders" (p. 1). Despite its increasing popularity, the concept of

purpose is rarely addressed through theory, the definitions of the concept vary, and it has been researched in a variety of ways (Clegg et al., 2021; George et al., 2021).

Theoretical foundations and related definitions

George et al.'s (2021) comprehensive analysis of the management literature related to organizational purpose in for-profit organizations found two distinct categories or types of purpose: goal based and duty based. The most common form is goal based, which is focused on the organization, is aligned with its mission, vision, and strategy statements, and does not necessarily incorporate the organization as a social actor in relationship to moral or ethical concerns in the external environment. The second category, duty based, tends to emerge from a "broader set of societal values and expectations and captures a higher order purpose that links to moral and ethical obligations" (George et al., 2021, p. 2). Some definitions of purpose seem to bridge these two categories in defining purpose as a "concrete goal or objective for the firm that reaches beyond profit maximization" (Henderson & Van den Steen, 2015, p. 327) and, in general, offering a more concrete expression than vision or mission, while Gartenberg et al. (2019) asserted that purpose goes beyond what is stated to the more intangible, which is how employees feel about the meaningfulness of their work.

George et al. (2021) asserted the importance of creating a unifying definition of purpose to advance future theory and research. They defined purpose in for-profit firms as the following:

> Purpose in the for-profit firm captures the essence of an organization's existence by explaining what value it seeks to create for its stakeholders. In doing so, purpose provides a clear definition of the firm's intent, creates the ability for stakeholders to identify with, and be inspired by, the firm's mission, vision, and values, and establishes actionable pathways and an aspirational outcome for the firm's actions. (p. 7)

George et al. (2021) proposed a framework that explores the drivers of organizations related to purpose and theorized that they are "continuous processes of framing, formalizing, and realizing purpose in organizations" (p. 2); they further explored how the institutional context can influence the drivers and how purpose is achieved.

Clegg et al. (2021) suggested a different perspective, as they conceptualized organizations as expressive systems rather than instrumental systems, which changed the meaning of purpose: "Organizations as expressive systems are oriented towards cultivating possibilities rather than fulfilling specific purposes defined ex ante. These systems operate in an 'open field', meaning that humans and their creations are 'ever-open', 'unfinished', in the sense of Heidegger's Dasein" (Clegg et al., 2021, p. 2). In developing the perspective of organizations as expressive systems, they analyzed the literature on how purpose is theorized in organizational studies and proposed that these different approaches over time are related to how organizations or firms

are conceptualized through different ideologies in different historical contexts. They provided thoughtful critiques of approaches from the literature, including economic, stakeholder, integrative social contracts theory, and social mission approaches and "contrast these approaches with an alternative 'ever-open' view of process in a new representation of what used to be called 'industry' (Jacobides et al., 2018), approached through the metaphorical notion of ecosystems, rather than limiting consideration to an organization's competitive environment" (p. 2). Redefining purpose beyond "fixed representations" highlights "a broader conception of businesses' effects on life" (Clegg et al., 2021, p. 3).

Current research and future directions

Gartenberg et al. (2019) asserted that "there has been little empirical progress on the role of purpose in strategic management" (p. 2), even with a significant increase of discussion in the public forum. They attributed the lack of progress in studying purpose to the lack of measurement technology across time and firms. They asserted that purpose goes beyond what is stated to the more intangible, which is how employees feel about the meaningfulness of their work. In their research, they constructed a survey that addresses "the intangibility challenge of corporate purpose by measuring the overall strength of employee beliefs in the degree to which their work is meaningful" (p. 2). They further explained that they "consider companies with strong purpose to be those in which employees in aggregate have a strong sense of the meaningfulness and collective impact of their work, and firms with weak or no purpose will contain employees without this sense" (p. 2).

Limited research has focused on purpose-led or purpose-driven organizations with the focus on social purpose. Von Ahsen and Gauch (2021) noted that most of these studies have involved large-scale quantitative research focusing more on opportunities associated with social purpose-driven organizations, such as enhancing reputation of organizations and employee engagement, rather than exploring the potential challenges of social purposes in organizations. Von Ashen and Gauch's study of purpose-led organizations in Germany and Switzerland included organizations that had implemented a purpose-driven approach. Social purpose was part of the initial founding in some of the organizations, while others initiated it as part of a community-driven approach.

While half of the organizations in their study highlighted that the social purpose positively affected their financial performance, all of them thought it contributed to employee motivation and had a positive effect on recruitment and customer loyalty. In contrast, about half of the organizations thought that it might have a negative impact on investors, who are driven exclusively by profits. Yet the organizations also acknowledged that this view might change in the future as there is

more recognition of the potential of the social purpose of organizations addressing societal issues and needs.

George et al. (2021) proposed that future research must "carve out a unique space for purpose scholars. Such researchers will need to define the differences and similarities between purpose and cognate domains such as corporate social responsibility, sustainability, and ethics" (p. 15). They also asserted the importance of studying how both internal and external environments may influence organizational purpose. They referenced examples such as Body Shop, where the purpose is connected to the founder and her legacy even after she departed (George et al., 2021). They suggested imprinting theory as a lens to help scholars explore how this happens and if it is an exception or the norm.

In contrast, Clegg et al. (2021), in theorizing organizations as expressive systems, proposed a relational ontology and

> the theoretical lens of process as an innovative and significant contribution to explore the purpose of the firm without a conceptual separation between humans and the rest of nature (Ergene et al., 2020). In such a perspective, the level of analysis is that of the field (Cooper, 1976). (p. 12)

They asserted the advantage of this conceptualization, in that it opens "opportunities for refreshing and adapting the theory of purpose to shifting societal expectations" (p. 12). Purpose is more of a "guiding principle that helps an organization navigate the field dynamically by understanding the organization as a whole in particular situations" (p. 12).

George et al. (2021) were mindful of the critical role of organizations in society and how further theorizing relative to purpose in organizations has great potential to connect organizations to societal issues. They concluded by delineating many of the critical social, environmental, and economic issues in societies around the globe and advocated for the "need to harness the power of the business corporation to achieve a purpose that is anchored in a sense of duty," adding that "as management scholars, we have an obligation to dedicate our own scarce resources to a research and educational agenda that recognizes the broad role of the for-profit firm in society and speak for the stakeholders whose voices otherwise risk remaining unheard" (p. 22).

The renewed interest in purpose in organizations and theorizing about purpose from different paradigms offers very promising directions for future research at the intersection of purpose and established as well as new forms of organizing. Considering time and place as part of purpose as process (Clegg et al., 2021) and how purpose in for-profit organizations is expanded to incorporate purpose related to the social good offers the potential to enhance the organization's role as a social actor in the ever-emerging societal issues in our interconnected world.

Relationship between purpose and legacy in organizational studies

The scholarship on purpose in organizations has not explored in depth the relationship between legacy and organizational purpose. At times, this literature acknowledges the influence of the founder in setting the initial purpose of an organization or the initial environmental conditions when an organization is established. It has not expanded on how the founder's role may coevolve over time with the organization's purpose in response to changing external environments, nor has it considered how the founder's influence, or legacy, may continue when the founder is no longer present in the organization to guide present and future strategic actions. George et al. (2021) began to explore how future research on purpose could investigate its relationship to organizational identity as well as how purpose plays a role in adapting to critical organizational events (p. 20). The theoretical and empirical work on organizational identity and its relationship to history and legacy in organizations (Hatch & Schultz, 2017; Ravasi et al., 2019) has great potential to contribute to recent theorizing on organizational purpose. Studies on legacy drawing on imprinting theories could offer insights into future research on purpose. For example, does the founder's legacy have the potential to support multiple purposes in organizations? As the meaning of the legacy evolves, remaining authentic to the past, does it serve as a stabilizing force, a constraint, or a driver of innovation and change? Whether theorizing organizational purpose as a process and a field or considering an organization as a social actor in a global society, the relationship between legacy and purpose in organizations and how it changes through intersections with forces from other levels of analysis offers promise.

Future research directions: Legacy and purpose

George et al. (2021) took a more instrumental perspective on purpose and did not include in their analysis critical theory or postmodern perspectives. In addition, the role of power was not directly addressed. Their focus was on for-profit organizations and the literature related to this organizational form. They did not include or speculate about other types of organizations and how purpose is developed and implemented. These offer potential areas to contribute to our understanding of purpose in organizations.

Additionally, the scholarship on purpose and legacy should be expanded to include purpose-driven organizations and other forms of organizing. Most of the scholarship on purpose is related to for-profit organizations and how their purpose may include multiple forms of purpose in addition to profits, either from the initial founding conditions or in response to societal expectations. There has been little empirical research on purpose-driven organizations and the role of the founding purpose over time as the organization changes in response to the external environment.

As the relationship between purpose and legacy is investigated, the use of different research methods from other disciplines could be expanded. Most of the empirical research on organizational purpose has used quantitative methods. Taking a more process based and field view of purpose could be facilitated through micro historical analysis combined with metahistory, which could consider both internal and external environmental dynamics.

As categorical boundaries become more fluid and innovation continues to develop and expand hybrid models, key to both the survival and longevity of the organization is its ability to maintain multiple tracks of purpose-driven and revenue-driven activity, along with a plural branding narrative. Scholars have employed the concept of multivocality to describe "why some hybrid organizations manage to remain hybrids over time while others face de-hybridization," drawing useful distinctions between organizations that are hybrid from the moment of their founding (what Alexius and Furusten called "constitutional hybrid organizations") and organizations that adopt a purpose-driven or revenue-driven dimension during their lifespans, as well as between short-lived and long-lived hybrid organizations (Alexius & Furusten, 2019). Alexius and Furusten (2019) explored how different types of hybrid organizations describe their respective organizational legacies. In their seminal book chapter on organizational identity, Albert and Whetten (1985) discussed hybrid organizations at length; one of their propositions was that hybrid organizations that are purpose-driven transition to a more business-profile orientation over time and that, in contrast, those organizations that are business-driven at their founding can transition to a more purpose-driven orientation. A time-based lens on this type of organization sheds light on the role of organizational history, especially origin stories and narratives of legacy, in the feasibility and sustainability of hybrid social and for-profit forms of organizing.

Legacy, change, and social purpose in organizations

Figure 5.3 presents a matrix of the dynamic interplay between social purpose, organizational legacy, and change. Examining these issues raises a number of questions: Is the social purpose built into the identity of the organization from its inception? Or is it a later addition, leading to a shift toward a hybrid organizational model or toward a radically different organizational identity? If built-in or constitutional per Alexius and Furusten (2019), how is the organization's legacy shaping current and future shifts in the definition and pursuit of the organization's social purpose? If the social purpose dimension is added later, how is the organization's legacy detracting from, or legitimizing, the shift in direction? In either case, how is the organization's legacy narrated at different points in time? Are there intentional choices in strategic legacy (per Ogbanna & Harris, 2001) that shape the narrative of the organization's history in service of enacting and legitimizing change? And how

can legacy play a role – by lending credence or serving as a cautionary tale – in the sustainable aspect of social change that purpose-driven missions often entail?
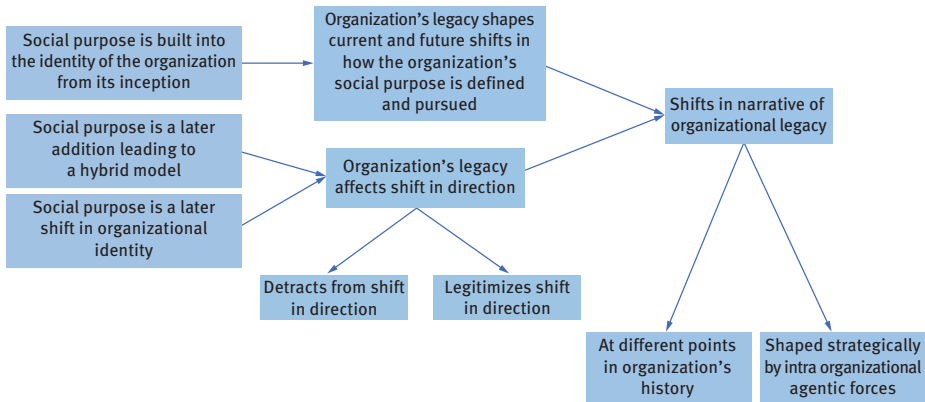
Figure 5.3: Matrix of dynamic interplay of social purpose, organizational legacy, and change.

Legacy and social purpose share a special relationship with time, especially duration and distance (see Chapter 3). The organization's legacy is built on significant periods of time, which can literally mean very different durations, from days to centuries, depending on industry and culture. Similarly, the organization's purpose of social change seeks significant periods of time as lasting impact, which again can vary vastly in terms of actual duration, depending on industry and culture. How can the past duration of organizational legacy provide a scaffolding for the intended future duration of the organization's social purpose? Depending on whether the organization is short-lived or long-lived, this interplay of past and future can extend to distant pasts and distant futures, thereby having a different relationship to extraorganizational history (i.e., relating to the *longue durée* of history versus the context of the day for organizations with shorter histories or lifespans).

Directions for future research

New research is emerging on social purpose in corporations – a literature that resonates with, but is distinct from, social entrepreneurship and hybrid model literature, and to which future empirical and theoretical work can contribute in significant ways. As the influence of corporations is recognized, increasingly more acutely, as rivaling that of governing bodies at local, national, and international levels, their social responsibility is not only acknowledged, both internally and externally (Jimenez & Pulos, 2016), but also warrants further study. Future research can build on extant

theorizing about hybrid organizations and about how such organizations navigate their dual identity over the course of their life cycles (Albert & Whetten, 1985).

How can corporations navigate educating their stakeholders and the larger public about their identities as they assume a more prominent social purpose? How can prioritizing social values (re)shape current mechanisms of organizational innovation, and especially of corporate innovation? And what are the implications of a core mission of social change for corporations that have indefinite (and thereby potentially perpetual) lifespans? Similar questions are being explored in other disciplinary frameworks as well, where social purpose is equally central to current and new research (e.g., political sciences, political and environmental history, gender studies). We suggest that being attentive to relevant new literatures in these related fields and embracing a responsibly formulated interdisciplinary perspective can greatly improve new scholarship in this generative subfield of organizational and management history.

The tension between the complexities and oppositions that often characterize social purposes, on the one hand, and the more straightforward nature of the financial-business orientation, on the other hand, is a major force shaping hybrid and purpose-driven organizations in practice, from hindering growth and longevity to stimulating innovation in organizing. As such, future scholarship in this subfield, both empirical and conceptual, is particularly timely and can have direct applications in practice for such organizations, also further contributing to the role that organizational and management history as a field can play in practice for management and organizing.

Chapter 6
Conclusions

The title of this book encapsulates a central puzzle: While we are exploring the past, we are focused on new and future directions. At its core, this project concerns itself with the complex structures, mechanisms, and processes that connect past, present, and future for organizations. Embracing complexity, multiple scales, and an interdisciplinary lens, our perspective on organizational and management history highlights the dynamic nature of the relationship between the past and the future of an organization and the central role of time – from pivotal moments to the *longue durée* – in understanding and articulating change in organizational identity.

The book offers one perspective on some of the multiple ways history and memory are defined and researched and their implications for practice across disciplines, from organizational studies to sociology to history. All of these disciplines offer various insights, yet clarity in concepts and definitions is critical to be able to use and build upon theory and research, particularly in theorizing relationships with other multifaceted concepts such as change and identity. As we noted in our introduction to this volume, the perilous exercise of theorizing across disciplines is highlighted in organizational and management studies as well as the humanities field of history and other social science disciplines, yet with such efforts there is the significant potential to create a more critical and complete understanding of complex phenomena representing challenging issues in our world.

Lent and Durepos (2019) and many others (Bruce, 2020; Bucheli & Wadhwani, 2014; Rowlinson et al., 2014) acknowledged and advocated for the value of history in organizational studies in theorizing and to enhance our contributions to practice. There has been passionate and critical debate about the value of the trajectory of the work since the "historic turn." For example, there are those such as Bowden (2021) who characterize the "historic turn" as a "tragic wrong turn," asserting that "in examining the 'historic turn' what one sees is a litany of misrepresentation, confusion and an unwillingness to even acknowledge well-known criticisms of their core understandings" (p. 10). These concerns as well as those expressed by those who praise the theory and research since the historic turn are efforts to more carefully and effectively integrate history into organizational studies to benefit organizations and the challenges being confronted by the world.

For most scholars in organizational and management history, the potential of the historic turn is a beacon in what often appears as a murky present for these scholars as they offer innovative perspectives for future theorizing. These inspiring perspectives include ideas such as Suddaby's (2016) proposing a "'historical consciousness' in business history that expands our collective assumptions and the nature and function of historical knowledge" (p. 46) and suggesting "bridging constructs" between organizational studies and history and how they might function.

Maclean et al. (2016, 2017) articulated five principles of historical organizational studies designed to promote a closer union between history and organizational theory, including "dual integrity, pluralistic understanding, representational truth, context sensitivity and theoretical fluency" (Maclean, Harvey, et al., 2021, p. 5). Of these principles, they proposed that dual integrity is most central. Dual integrity "underscores the importance of both historical veracity and conceptual rigor, extending mutual respect to history and organization studies in uniting the two, such that each discipline informs and enhances the other without either becoming the driver of the other" (Maclean, Harvey, et al., 2021, p. 5).

Clegg et al. (2021) also wisely counseled that in what might seem to be difficult and at times overwhelming work in this endeavor, "a single person does not have to do all the work, and a division of labour, whether explicit or implicit, that is respectfully constructed, can do much to advance dual integrity" (p. 230).

The opportunities and promise as the world confronts challenging questions in which organizing is a key feature are worth the hard work and the risks involved. In addition to bridging disciplines and integrating and expanding upon innovative research methods as many scholars have offered, further strategies could address creative approaches to integrate practitioners from different disciplines both in the theorizing and research. These strategies are necessary to not only enhance our scholarship but, most importantly, to implement critical solutions to some of the world's current and future pressing problems. Bridging scholarship and practice is as critical to theorizing as bridging disciplines and integrating research methodologies. Promising concepts and guiding principles such as dual integrity (Maclean et al., 2016, 2017, 2021) offer much to quietly guide and inform our work moving forward.

We suggest that while an awareness of these debates is crucial for the scholar of organizational and management history, an important next step for the field is to find stimulating and generative ways to bridge these debates and to move forward, not necessarily by choosing one side of the debate over the other or by dialectically merging contrasting ideas, but by embracing the complexity of the field. Working *with* and not *against* the complexity has the potential to maintain and expand the disciplinary richness of the field, to stimulate important conversations about the nature of history and historical work, and to participate in a more active dialogue between scholarship and practice.

Below we propose specific ways we have attempted to bridge the debates and advance the critical puzzles of the field. These are not the only ways, and we recognize that they represent kernels only, which we hope that future scholarship will further clarify, complicate, and expand upon.

Degrees of conceptual overlap. In reviewing literature exploring the same or similar topics, especially the fundamental ones for this field, such as time, history, tensions, and complexity, we have found, unsurprisingly, a great variety of perspectives that are often vastly different from each other or diametrically opposed. However, we

have also found that these undeniably different theories from different fields have various degrees of conceptual overlap (e.g., similar notions expressed differently, similar assumptions even if employed to different ends, similar conclusions despite discrete worldviews). In our work, we have attempted to map these similarities and differences in order to pinpoint, as precisely as possible, the conceptual areas that they share. The literal or figurative diagramming of frameworks from multiple disciplines helped enrich our own understanding of the ideas in question and develop a fuller conceptual map for our own project. Exploring other perspectives beyond the paradigm of choice can be a worthwhile path in the literature review and conceptual framework stages of projects in organizational and management history.

Multiple scales. An interrogation of forms and structures of organizing through the lens of time entails awareness and analysis of multiple scales, from the micro level of isolated events or strictly delineated phenomena to the macro level of slow and gradual societal and civilizational changes, whose identification and analysis is afforded by a *longue durée* lens. Working with the complexity of multiple scales of time, as opposed to narrower foci on microhistorical analysis only or on macro changes vis-à-vis organizations, contributes significantly to the soundness of scholarship in organizational history.

Overlapping layers of time. As reviewed throughout this book, extant literature in the field calls attention to the importance of integrating the dimension of time in the study of organizations. We are particularly drawn to the range of types of organizational times: different durations (from periods with immovable boundaries to *longue durées*); different segmentations of the temporal flow; intra- and extraorganizational time and their respective periodizations, etc. These different ways to define and segment time in relation to organizations can crystallize a set of temporal layers, all of which play important roles in organizational history, especially as they overlap and influence one another. We have found that identifying and defining which temporal layer we are investigating can strengthen a case study; even more useful, we would argue, is to research two or several of the organization's temporal layers in order to create a fuller picture of the organization's temporal landscape.

Agentic forces. Questions of intentionality and agency remain central to organizational studies that incorporate notions of time and historical methods. As noted in the introduction to this book, as we wrote this text we have attempted to be self-reflexive and acknowledge what our respective worldviews enable or hinder in our collaborative work. Recognizing the authorial control of writers of history is vital, we would argue, to historiographical approaches to case studies in organizational and management history. The metahistorical lens can uncover not only the agency of record keepers, archivists, and historians external to the organization, but also the agency of those internal to the organization who have shaped the narrative about the organization's origin story and evolution throughout its history, however short or long-lived. Lastly, in interrogations of the past itself, to the extent to which it can be known, we

have learned, from the literature reviewed in this book and our own case study research, that a wide range of individuals, organizations, and economic and sociopolitical phenomena can have agentic force, amounting to layers of intentionality and agency that contribute to the complex matrix of the organization in time.

Intentionality and purpose. Another aspect of intentionality is closely linked to the notion of purpose in organizations. We have learned that investigating an organization's purpose over time can shed light on the dynamic interplay of identity and change during the organization's lifespan. New research is warranted to further explore the relationships between the purposes of key organizational leaders and those of extraorganizational agentic forces, on the one hand, and the purpose of the organization itself, on the other hand, as captured and codified in narratives of the organization, both internal and external, during the organization's lifespan.

Tensions, oppositions, and binaries. Throughout their lifespan, organizations are shaped by consequential events, disruptions, or discontinuities in the temporal flow (Langley et al., 2013), less perceptible processes that effect change, and tensions that unfold in time and are latent (Schad & Bansal, 2018) or more visible. Drawing on the systems perspective, paradox studies, the Annales School interdisciplinary approach to historiography, or a combination of such lenses and methodologies, scholars in organizational and management history can advance the field by focusing on oppositions, binaries, discontinuities, and tensions, shedding light on their formation, structure, interaction, and effect on the organization.

Legacy and change. Often construed as a tension or a paradox, the relationship between an organization's legacy and organizational change is, as we argue in this book, more complex than merely oppositional. The very notion of legacy is essentially interdisciplinary, as we explain in Chapter 5, reviewing similar concepts such as history, intergenerational transmission, heritage, imprinting, and reputation and their discrete implications and areas of focus. We propose that legacy presents an opportunity for shaping an organization's present and future, and that further research on how legacy is narrated and leveraged, especially via empirical work with historical case studies, can offer new perspectives that would also have applications in practice.

By tracing the history of the field of organizational and management history, its roots in, and resonance with, related fields like history in the humanities, business history, and organizational studies, as well as its core concepts and the extent to which these concepts reside, epistemologically, at the intersection of multiple disciplinary angles, we have shown that organizational and management history as a field is intrinsically interdisciplinary. We argue that this core interdisciplinary aspect, instead of being "resolved," should be further explored and utilized to increase the richness and reach of scholarship in organizational and management history. The field has already contributed significantly to theoretical and methodological innovations in organizational and management studies. The directions of future research that we have outlined in this

book can also help the field grow as a connector between theory and practice. Although superficially regarded as more removed from practice than other approaches, historical methods and perspectives are embraced in a nonacademic way in practice and can provide more rigorous insight from within an academic framework.

Studying the history of organizations, we would argue, recenters the richness and complexity of case studies in organizational and management studies. It can add depth to individual projects and breadth to the field at large. We suggest that scholars in organizational and management history work with and not against the complexity that characterizes the intersection of time and organizations. We also propose that scholars in organizational and management history continue to offer strategies that embrace self-reflexive approaches to historiography and research and that leverage the productive tensions of multidisciplinary frameworks. We hope that this book has set the stage for this new book series by sketching a map of both answers and questions onto which new scholarship can provide fresh perspectives, open new debates, and discover more channels for cross-disciplinary collaboration.

References

Albert, S., & Whetten, D. A. (1985). Organizational identity. In L. L. Cummings & B. M. Staw (Eds.), *Research in organizational behavior* (pp. 263–295). JAI Press.

Alexius, S., & Furusten, S. (2019). Exploring constitutional hybridity. In S. Alexius & S. Furusten (Eds.), *Managing hybrid organizations*. Palgrave Macmillan. https://doi.org/10.1007/978-3-319-95486-8_1

Alford, R. R., & Friedland, R. (1985). *Powers of theory. Capitalism, the state, and democracy*. Cambridge University Press.

Allen, C. (2004). *Tracing the evolution of social software. Life with Alacrity*. Retrieved January 5, 2020, from http://www.lifewithalacrity.com/2004/10/tracing_the_evo.html

American Alliance of Museums. (2014). *Building the future of education: Museums and the learning ecosystem*. Center for the Future of Museums. https://www.aam-us.org/wp-content/uploads/2017/12/Building-the-Future-of-Education.pdf

Ancona, D. G., Goodman, P. S., Lawrence, B. S., & Tushman, M. K. (2001). Time: A new research lens. *Academy of Management Review*, *26*(40), 645–663.

Anderson, M., & Sun, P. Y. T. (2010). What have scholars retrieved from Walsh and Ungson (1991). A citation context study. *Management Learning, 41*(2), 131–145. https://doi.org/10.1177/1350507609341091

Andriopoulos, C., & Lewis, M. W. (2009). Exploitation-exploration tensions and organizational ambidexterity: Managing paradoxes of innovation. *Organization Science*, *20*, 696–717.

Anteby, M., & Molnar, V. (2012). Collective memory meets organizational identity: Remembering to forget in a firm's rhetorical history. *Academy of Management Journal*, *55*(3), 515–540. doi:10.5465/amj.2010.0245

Appadurai, A. (2013). *The future as cultural fact: Essays on the global condition*. Verso.

Argote, L. (2013). *Organizational learning: Creating, retaining and transferring knowledge* (2nd ed.). Springer. https://doi.org/10.1007/978-1-4614-5251-5

Argote, L., Lee, S., & Park, J. (2020). Organizational learning processes and outcomes: Major findings and future research directions. *Management Science*, *67*(9), 1–31.

Argote, L., & Miron-Spektor, E. (2011). Organizational learning: From experience to knowledge. *Organization Science*, *22*(5), 1123–1137. https://doi.org/10.1287/orsc.1100.0621

Argyris, C., & Schon, P. (1978). *Organizational learning*. Addison-Wesley.

Arnade, P., & Prevenier, W. (2015). *Honor, vengeance, and social trouble: Pardon letters in the Burgundian low countries*. Cornell University Press. https://doi.org/10.7591/9780801455766

Ashforth, B., Schinoff, B., & Brickson, S. (2020). "My company is friendly," "Mine's a rebel": Anthropomorphism and shifting organizational identity from "what" to "who." *Academy of Management Review*, *45*(1), 29–57.

Ashkanasy, N. M., & Dorris, A. D. (2017). Emotions in the workplace. *Annual Review of Organizational Psychology and Organizational Behavior*, *4*(1), 67–90. doi:10.1146/annurev-orgpsych-032516-11323

Asimakou, T. (2009). *Innovation, knowledge and power in organizations*. Routledge.

Atkinson, W. (2018). Time for Bourdieu: Insights and oversights. *Time & Society*, *28*(3), 951–970.

Bailey, M. (2021). *Van Gogh's finale: Auvers and the artist's rise to fame*. Frances Lincoln.

Banno, M. (1964). *China and the West, 1858–1861: The origins of the Tsungli Yamen*. Harvard University Press. https://doi.org/10.4159/harvard.9780674280564

Barthes, R. (1980). *Camera Lucida: Reflections on photography*. Trans. R. Howard. Farrar, Straus and Giroux.

Bennett, T., & Joyce, P. (2010). *Material powers: Cultural studies, history and the material turn*. Routledge.

Berger, P. L., & Luckmann, T. (1966). *The social construction of reality. A treatise in the sociology of knowledge*. Doubleday.

Bergson, H. (2013). *Creative evolution*. Macmillan. (Originally published in 1911)

Bevir, M. (1999). *The logic of the history of ideas*. Cambridge University Press.

Bevir, M. (2000). The logic of the history of ideas: Rethinking history. *The Journal of Theory and Practice, 4*(3), 295–300.

Bevir, M. (2011). The logic of the history of ideas: Then and now. *Intellectual History Review*, *21*(1), 105–119.

Bloch, M. (1953). *The historian's craft*. Alfred A. Knopf.

Bluedorn, A. C., & Denhardt, R. B. (1988). Time and organizations. *Journal of Management*, *14*(2), 299–320.

Boddice, R. (2018). Neurohistory. In M. Tamm & P. Burke (Eds.), *Debating new approaches to history* (pp. 301–326). Bloomsbury Publishing. https://doi.org/10.5040/9781474281959.0016

Booth, C., & Rowlinson, M. (2006). Management and organizational history: Prospects. *Management & Organizational History*, *1*(1), 5–30.

Boschma, G., Davidson, L., & Bonifacio, N. (2009). Bertha Harmer's 1922 textbook – *The Principles and Practice of Nursing:* Clinical nursing from an historical perspective. *Journal of Clinical Nursing*, *18*(19), 2684–2691. https://doi.org/10.1111/j.1365-2702.2009.02891.x

Bourdieu, P. (1977). *Outline of a theory of practice*. Cambridge University Press.

Bowden, B. (2018). *Work, wealth and postmodernism: The intellectual conflict at the heart of business endeavour*. Palgrave Macmillan.

Bowden, B. (2019). Editorial. *Journal of Management History*, *25*(1), 2–8. https://doi.org/10.1108/JMH-01-2019-287

Bowden, B. (2021). The historic (wrong) turn in management and organizational studies. *Journal of Management History*, *27*(1), 8–27.

Bowden, B., & Lamond, D. (2015). *Management history: Its global past and present*. Information Age.

Braudel, F. (1949/2008). *The Mediterranean and the Mediterranean world in the age of Philip II*. University of California Press. (Original work published 1949)

Braudel, F. (1958). Histoire et Sciences sociales: La longue durée. *Annales*, *13*(4), 725–753.

Breisach, E. (2007/1983). *Historiography: Ancient, medieval, and modern* (3rd ed.). University of Chicago Press.

Bruce, K. (2020). Introduction: The hotly contested present state of management and organizational history. In K. Bruce (Ed.), *Handbook of research on management and organizational history* (pp. 1–9). Edward Elgar. https://doi.org/10.4337/9781788118491.00006

Brunninge, O. (2009). Using history in organizations: How managers make purposeful reference to history in strategy processes. *Journal of Organizational Change Management*, *22*, 8–26.

Bucheli, M., & Wadhwani, R. D. (Eds.). (2014). The future of the past in management and organization studies. In M. Bucheli & R. D. Wadhwani (Eds.), *Organizations in time: History, theory, methods* (pp. 3–30). Oxford University Press.

Burguière, A. (2009). *The Annales school: An intellectual history*. Cornell University Press.

Burrell, G. (1997). *Pandemonium: Towards a retro-organization theory*. Sage.

Burton, M. D., & Beckman, C. M. (2007). Leaving a legacy: Position imprints and successor turnover in young firms. *American Sociological Review*, *72*, 239–266.

Canning, C., & Postlewait, T. (2010). *Representing the past: Essays in performance historiography*. University of Iowa Press.

Carmine, S., Andriopoulos, C., Gotsi, M., Härtel, C. E. J., Krzeminska, A., Mafico, N., Pradies, C., Raza, H., Raza-Ullah, T., Schrage, S., Sharma, G., Slawinski, N., Stadtler, L., Tunarosa, A.,

Winther-Hansen, C., & Keller, J. (2021). A paradox approach to organizational tensions during the pandemic crisis. *Journal of Management Inquiry*, *30*(2), 138–153. https://doi.org/10.1177/1056492620986863

Casey, A. (1997). Collective memory in organizations. In J. P. Walsh & A. S. Huff (Eds.), *Advances in strategic management: Vol. 14. Organizational learning and strategic management* (pp. 111–154). JAI Press.

Casey, A. (2019). *Organizational identity and memory: A multidisciplinary approach*. Routledge.

Casey, A., & Olivera, F. (2003). *Organizational memory remembered: A look back and future directions*. Paper presented at the annual meeting of the Academy of Management.

Casey, A., & Olivera, F. (2007). *Organizational memory remembered: A look back and future directions*. Unpublished paper.

Casey, A. J., & Olivera, F. (2011). Reflections on organizational memory and forgetting. *Journal of Management Inquiry*, *20*, 305–310.

Cattani, G., Ferriani, S., & Lanza, A. (2017). Deconstructing the outsider puzzle: The legitimation journey of novelty. *Organization Science*, *28*(6), 965–992.

Chandler, A. (1962). *Strategy and structure: Chapters in the history of the American industrial enterprise*. Massachusetts Institute of Technology Press.

Charmaz, K. (2014). *Constructing grounded theory* (2nd ed.). Sage.

Chlld, J. (2002). The international crisis of confidence in corporations. *Academy of Management Perspectives, 16*(3), 145–47.

Clark, P., & Rowlinson, M. (2004). The treatment of history in organization studies. Towards an 'historic turn'? *Business History*, *46(3*), 331–352.

Clegg, S., Cunha, P. E., Rego, A., & Santos, F. (2021). 'Open purpose': Embracing organizations as expressive systems. *Organization Theory*, *2*, 1–22.

Clegg, S. R., Suddaby, R., Harvey, C., & Maclean, M. (2021). At the interactions of theory and history. A research agenda for historical organization studies. In M. Maclean, S. R. Clegg, R. Suddaby, & C. Harvey (Eds.), *Historical organization studies. Theory and applications* (pp. 227–241). Routledge.

Cohen, T. V. (2017). The macrohistory of microhistory. *Journal of Medieval and Early Modern Studies*, *47*(1), 53–73. https://doi.org/10.1215/10829636-3716578

Collins, P. H. (1990). *Black feminist thought: Knowledge, consciousness, and the politics of empowerment*. Unwin Hyman.

Coman, S., & Casey, A. (2020, July). *Metahistories of microhistories: How organizations narrate their origin story at different points in their history*. Paper presented at the European Group for Organizational Studies.

Cooper, R. (1976). The open field. *Human Relations, 29, 999*–1017.

Coraiola, D. M., Foster, W. M., & Suddaby, R. (2015). Varieties of history in organization studies. In P. G. McLaren, A. J. Mills, & T. G. Weatherbee (Eds.), *The Routledge companion to management and organizational history* (pp. 363–372). Routledge.

Creswell, J. W. (2013). *Qualitative inquiry and research design. Choosing among the five approaches* (3rd ed.). Sage.

Croce, B. (1915/1921). *Theory and history of historiography*. George G. Harrap and Co.

Cummings, S., Bridgman, T., Hassard, J., & Rowlinson, M. (2017). *A new history of management*. Cambridge University Press.

Davis-Marks, I. (2020). Why the Houston Museum of African American Culture is displaying a Confederate statue. *Smithsonian Magazine*. https://www.smithsonianmag.com/smart-news/why-houston-museum-african-american-culture-displaying-confederate-statue-180975742/

Deal, N. M., Mills, A. J., & Helms Mills, J. (2018). Amodern and modern warfare in the making of a commercial airline. *Management & Organizational History*, *13*(4), 373–396. https://doi.org/10.1080/17449359.2018.1547647

Deane, G., Beck, E., & Tolnay, S. (1999). Incorporating space into social histories: How spatial processes operate and how we observe them. In L. Griffin & M. Van der Linden (Eds.), *New methods for social history* (International Review of Social History Supplements, pp. 57–80). Cambridge University Press. https://doi.org/10.1017/CBO9780511563874.004

Décultot, E. (2019). Winckelmann's model of art historiography and its reception in the late 18th and 19th century. In E. Podoksik (Ed.), *Doing humanities in nineteenth-century Germany* (pp. 85–109). Brill. https://doi.org/10.1163/9789004416840_006

Didi-Huberman, G. (2002). *L'Image survivante: Histoire de l'art et temps des fantômes selon Aby Warburg*. Les Éditions de Minuit.

DiMaggio, P. (1997). Culture and cognition. *Annual Review of Sociology*, *23*, 263–287. https://doi.org/10.1146/annurev.soc.23.1.263

DiMaggio, P. J., & Powell, W. W. (1983). The iron cage revisited: Institutional isomorphism and collective rationality in organizational fields. *American Sociological Review*, *48*(2), 147–160. https://doi.org/10.2307/2095101

Dirks, N. (1996). Is vice versa? Historical anthropologies and anthropological histories. In T. J. McDonald (Ed.), *The historic turn in the human sciences*. University of Michigan Press.

Douglas, M. (1986). *How institutions think*. Syracuse University Press.

Downs, L. (2018). Gender history. In M. Tamm & P. Burke (Eds.), *Debating new approaches to history* (pp. 101–126). Bloomsbury Publishing. https://doi.org/10.5040/9781474281959.0009

Duke University. (2020). *MicroWorlds Lab: A humanities unbounded collaborative project in history at Duke University*. Retrieved January 10, 2021, from https://sites.duke.edu/microworldslab/about-us/

Durepos, G., & Mills, A. J. (2011). Actor-network theory, ANTi-history and critical organizational historiography. *Organization*, *19*(6), 703–721.

Durepos, G., & Mills, A. J. (2012). *ANTi-history: Theorizing the past, history and historiography in management and organizational studies*. Information Age.

Durepos, G., & Mills, A. J. (2017). ANTi-history, relationalism and the historic turn in management and organization studies. *Qualitative Research in Organizations and Management*, *12*(1), 53–67. http://dx.doi.org/10.1108/QROM-07-2016-1393

Durepos, G., Mills, A. J., & McLaren, P. G. (2020). Contextualizing the historian: An ANTi-history perspective. In K. Bruce (Ed.), *Handbook of research on management and organizational history* (pp. 275–292). Edward Elgar. https://doi.org/10.4337/9781788118491.00022

Elfenbein, H. A. (2006). Emotion in organizations: A review and theoretical integration. *Academy of Management Annals*, *1*(1), 315–386. https://doi.org/10.5465/078559812

Ergene, S., Bannerjee, S. B., & Hoffman, A. J. (2020). (Un)sustainability and organization studies: Towards a radical engagement. *Organization Studies*, *42*(8), 1319–1335. https://doi.org/10.1177/0170840620937892

Eriksen, T. H. (1996). *Kampen om fortiden: Et essay om myter, identitet og politick*. Aschehoug.

Fasoli, D. R. (2010). The culture of nursing engagement: A historical perspective. *Nursing Administration Quarterly*, *34*(1), 18–29. https://doi.org/10.1097/NAQ.0b013e3181c95e7a

Fear, J. (2014). Mining the past: Historicizing organizational learning and change. In M. Bucheli & R. D. Wadhwani (Eds.), *Organizations in time. History, theory, methods* (pp. 169–191). Oxford University Press.

Fiol, C. M., & Lyles, M. A. (1985). Organizational learning. *Academy of Management Review*, *10*(4), 803–813. https://doi.org/10.5465/amr.1985.4279103

Fischer, R., Ferreira, M. C., Assmar, E. M. L., Baris, G., Berberoglu, G., Dalyan, F., Wong, C. C., Hassan, A., Hanke, K., & Boer, D. (2014). Organizational practices across cultures: An exploration in six cultural contexts. *International Journal of Cross Cultural Management*, *14*(1), 105–125. https://doi.org/10.1177/1470595813510644

Fohlen, C. (1955). *Une affaire de famille au XIXe siècle: Méquillet-Noblot*. Université de Paris.

Follett, M. P. (1924). *Creative experience*. Longmans, Green and Co.

Follett, M. P. (1998). *The new state: Group organization the solution of popular government*. Pennsylvania State University Press. (Original work published 1918)

Folts, F. E. (1949). *Introduction to industrial management: Text, cases, and problems* (3rd ed.). McGraw-Hill.

Foroughi, H., Coraiola, D. M., Rintamäki, J., Mena, S., & Foster, W. M. (2020). Organizational memory studies. *Organization Studies*, *41*(12), 1725–1748.

Foster, W. M., Coraiola, D., Quinn-Trank, C., & Bastien, F. (2020). Unpacking organizational re-membering. In K. Bruce (Ed.). *Handbook of research on management and organizational history* (pp. 256–274). Edward Elgar Publishing.

Foster, W. M., Suddaby, R., Minkus, A., & Wiebe, E. (2014). History as social memory assets: The example of Tim Hortons. *Management and Organizational History*, *6*, 101–120.

Foucault, M. (1972). *The archeology of knowledge and the discourse on language*. Pantheon.

Friedman, L. (1954). Kant's theory of time. *The Review of Metaphysics*, *7*(3), 379–388.

Gartenberg, C., Prat, A., & Serafeim, G. (2019). Corporate purpose and financial performance. *Organization Science*, *30*, 1–18.

Gaskell, I. (2018). History of things. In M. Tamm & P. Burke (Eds.), *Debating new approaches to history* (pp. 217–246). Bloomsbury Publishing. https://doi.org/10.5040/9781474281959.0013

Geertz, C. (1973). *The interpretation of cultures*. Basic Books.

Gell, A. (1992). *The anthropology of time: Cultural constructions of temporal maps and images*. Berg.

George, G., Haas, M. R., McGahan, A. M., Schillebeeckx, S. J. D., & Tracey, P. (2021). Purpose in the for-profit firm: A review and framework for management research. *Journal of Management*, 1–29. https://doi.org/10.1177/01492063211006450

Gerring, J., & Cojocaru, L. (2016). Selecting cases for intensive analysis: A diversity of goals and methods. *Sociological Methods & Research*, *45*(3), 392–423. https://doi.org/10.1177/0049124116631692

Gibbon, E. (1776–1789). *The history of the decline and fall of the Roman Empire*. Strahan & Cadell.

Gibson, J. W., & Deem, J. (2016). Leadership lessons from the past: Examining the work of Mary Parker Follett and Lilian Gilbreth. *International Leadership Journal*, *8*(1), 3–26.

Gilbert, F. (1990). *History: Politics or culture? Reflections on Ranke and Burckhardt*. Princeton University Press. https://doi.org/10.1515/9781400861071

Gilbreth, F. B., Jr. (1970). *Time out for happiness*. Thomas Y. Crowell.

Gillet, M. (1955). Review of Claude Fohlen, Une Affaire de famille au XIXe siècle: Méquillet-Noblot. Cahiers de la Fondation Nationale des Sciences Politiques, nº 71. *Revue du Nord*, *148*, 276–278.

Glaser, B., & Strauss, A. (1967). *The discovery of grounded theory: Strategies for qualitative research*. Aldine Publishing.

Glynn, M. A. (2008). Configuring the field of play: How the mega-event of the Olympics impacts civic community in host cities. *Journal of Management Studies*, *45*(6), 1117–1146.

Goldman, P. (1994). Searching for history in organizational theory: Comment on Kieser. *Organization Science*, *5*(4), 621–623.

Gotcher, J. M. (1992). Assisting the handicapped: The pioneering efforts of Frank and Lilian Gilbreth. *Journal of Management*, *18*(1) 5–13.

Grattan, R. (2013). Management research during World War II. *Oxford Bibliographies*. https://www.oxfordbibliographies.com/view/document/obo-9780199846740/obo-9780199846740-0021.xml

Halbwachs, M. (1950/1980). *The collective memory*. Harper.

Hareli, S., & Rafaeli, A. (2008). Emotion cycles: On the social influence of emotion in organizations. *Research in Organizational Behavior*, *28*, 35–59.

Harvard Library. (n.d.). Franklin E. Folts papers. Retrieved December 7, 2021, from https://hollisarchives.lib.harvard.edu/repositories/11/resources/9528

Hatch, M. J. (2018). *Organization theory. Modern, symbolic and postmodern perspectives* (4th ed.). Oxford University Press.

Hatch, M. J., & Schultz, M. (2017). Toward a theory of using history authentically: Historicizing in the Carlsberg Group. *Administrative Science Quarterly*, *62*, 657–697. https://doi.org/10.1177/0001839217692535

Hatfield, G. (2001). Perception: History of the concept. In N. J. Smelser & P. B. Baltes (Eds.), *International encyclopedia of the social & behavioral sciences* (pp. 11202–11205). Pergamon. https://doi.org/10.1016/B0-08-043076-7/00137-6

Hay, J. (1994). The suspension of dynastic time. In J. Hay (Ed.), *Boundaries in China* (pp. 171–197). Reaktion Books.

Hedberg, B. (1981). How organizations learn and unlearn. In P. C. Nystrom & W. H. Starbuck (Eds.), *Handbook of organization design* (pp. 8–27). Oxford University Press.

Heffer, J., & Weil, F. (2021). Fohlen Claude (1922–2008). *Encyclopædia universalis*. https://www.universalis.fr/encyclopedie/claude-fohlen/

Henderson, R., & Van der Steen, E. (2015). Why do firms have "purpose"? The firm's role as a carrier of identity and reputation. *American Economic Review*, *105*(5), 326–330. http://dx.doi.org/10.1257/aer.p20151072

Herfeld, C., & Doehne, M. (2018). Five reasons for the use of network analysis in the history of economics. *Journal of Economic Methodology*, *25*(4), 311–328. https://doi.org/10.1080/1350178X.2018.1529172

Herrick, S. K. (2019). Introduction. In *Hagiography and the history of Latin Christendom, 500–1500* (pp. 1–10). Brill. https://doi.org/10.1163/9789004417472_002

Hollensbe, E., Wookey, C., Hickey, L., George, G., & Nichols, C. V. (2014). Organizations with purpose. *Academy of Management Journal, 57,* 1227–1234.

Holmes, A. (2020). Researcher positionality – a consideration of its influence and place in qualitative research – a new researcher guide. *Shanlax International Journal of Education*, *8*(4), 1–10. https://doi.org/10.34293/education.v8i4.3232

Howard-Grenville, J., Metzger, M., & Meyer, A. D. (2013). Rekindling the flame: Processes of identity resurrection. *Academy of Management Journal*, *56*, 113–136. https://doi.org/10.5465/amj.2010.0778

Huber, G. (1991). Organizational learning: The contributing processes and the literature. *Organization Science*, *2*(1), 88–115. https://doi.org/10.1287/orsc.2.1.88

Husserl, E. (1931). *Ideas: General introduction to pure phenomenology* (D. Carr, Trans.). Northwestern University Press.

Husserl, E. (1964). *The phenomenology of internal time-consciousness* (M. Heidegger, Ed.). Indiana University Press.

Husserl, E. (1983). *Ideas pertaining to a pure phenomenology and to a phenomenological philosophy*. Trans. F. Kersten. Nijhoff. (Originally published in 1913)

Jacobides, M. G., Cennamo, C., & Gawer, A. (2018). Towards a theory of ecosystems. *Strategic Management Journal*, *39*(8), 2255–2276. https://doi.org/10.1002/smj.2904

Jacobson Schutte, A. (1976). Carlo Ginzburg. *The Journal of Modern History*, *48*(2), 296–315.

Jacques, R. (1996). *Manufacturing the employee: Management knowledge from the 19th to 21st centuries*. Sage.

Jain, A. (2020). Is organizational memory a useful capability? An analysis of its effects on productivity, absorptive capacity, and adaptation. In L. Argote & J. Levine (Eds.), *Handbook of group and organizational learning* (pp. 295–314). Oxford University Press.

Jarzabkowski, P., Lê, J. K., & Van de Ven, A. H. (2013). Responding to competing strategic demands: How organizing, belonging, and performing paradoxes coevolve. *Strategic Organization*, *11*, 245–280.

Jenkins, K. (1991). *Re-thinking history*. Routledge.

Jenkins, K. (2003). *Rethinking history* (3rd ed.). Routledge.

Jerram, L. (2013). Space: A useless category for historical analysis? *History and Theory*, *52*(3), 400–419. https://doi.org/10.1111/hith.10676

Jimenez, G., & Pulos, E. (2016). *Good corporation, bad corporation: Corporate social responsibility in the global economy*. SUNY Textbooks.

Jones, C., & Maoret, M. (2018). *Frontiers of creative industries: Exploring structural and categorical dynamics* [Research in the Sociology of Organizations, Vol. 55]. Emerald Publishing. https://doi.org/10.1108/S0733-558X20180000055001

Jones, G. S. (2005). The determinist fix: Some obstacles to the further development of the linguistic approach to history in the 1990s. In G. Spiegel (Ed.), *Practicing history: New directions in historical writing after the linguistic turn* (pp. 62–75). Routledge.

Jones, J. (2016). De-constructing positionality in academic writing: A reflexive journey into voice. *Caribbean Educational Research Journal*, *4*(1), 66–78.

Kant, I. (2018). *Critique of pure reason*. Pantianos Classics. (Originally published in 1781)

Kanter, R. M. (1995). Preface. In P. Graham (Ed.), *Mary Parker Follett – Prophet of management: A celebration of writings from the 1920s* (pp. 4–8). Harvard Business School Press.

Katriel, T. (1994). Sites of memory: Discourses of the past in Israeli pioneering settlement museums. *Quarterly Journal of Speech*, *80*(1), 1–20.

Katz, D., & Kahn, R. L. (1978). *The social psychology of organizations* (2nd ed.). John Wiley & Sons.

Kieser, A. (1994). When organization theory needs historical analyses – and how this should be performed. *Organization Science*, *5*(4), 608–620.

Kimberly, J. R., & Bouchikhi, H. (1995). The dynamics of organizational development and change: How the past shapes the present and constrains the future. *Organization Science*, *6*, 9–18.

Kimura, T. (1956). 人物財閥史 (“Jinbutsu zaibatsu shi,” *A History of Zaibatsu Personnel*). Jitsugyo no Nihon Sha.

Kipping, M., & Üsdiken, B. (2014). History in organization and management theory: More than meets the eye. *Academy of Management Annals*, *8*(1), 535–588. https://doi.org/10.5465/19416520.2014.911579

Kroeze, R., & Keulen, S. (2013). Leading a multinational is history in practice: The use of invented traditions and narratives at AkzoNobel, Shell, Philips and ABN AMRO. *Business History*, *55*, 1265–1287.

Lambert-Dansette, J. (2000). Histoire de l’entreprise et des chefs d’entreprise en France: Le temps des pionniers (1830–1880). *Entreprendre – Tome I*. (n.p.). Editions L’Harmattan.

Langley, A. (1999). Strategies for theorizing from process data. *Academy of Management Review*, *24*, 691–710. https://doi.org/10.5465/amr.1999.2553248

Langley, A., Smallman, C., Tsoukas, H., & Van de Ven, A. H. (2013). Process studies of change in organization and management: Unveiling temporality, activity and flow. *Academy of Management Journal*, *56*(1), 1–13. https://doi.org/10.5465/amj.2013.4001

Lapoujade, D. (2018). *Powers of time: Versions of Bergson*. University of Minnesota Press.

Law, J. (1992). Notes on the theory of the ANT: Ordering, strategy and heterogeneity. *Systems Practice*, *5*(4), 379–393.

Lawrence, P. R., & Lorsch, J. W. (1967). Differentiation and integration in complex organizations. *Administrative Science Quarterly*, *12*(1), 1–47.

Lee, R. (2012). *The longue durée and world-systems analysis*. State University of New York Press.

Lent, W. V., & Durepos, G. (2019). Nurturing the historic turn: "History as theory" versus "history as method." *Journal of Management History*, *25*(4), 429–442.

Lepetit, B. (1995). *Les formes de l'expérience: Une autre histoire sociale*. Albin Michel.

Levasseur, E. (1903). *Histoire des classes ouvrières et de l'industrie en France de 1789 à 1870*. A. Rousseau.

Lewis, M. W. (2000). Exploring paradox: Toward a more comprehensive guide. *Academy of Management Review*, *25*, 760–776.

Lima, R. S., Silva, M. A. I., de Andrade, L. S., de Góes, F. D. S. N., Mello, M. A., & Gonçalves, M. F. C. (2020). Construction of professional identity in nursing students: Qualitative research from the historical-cultural perspective. *Revista Latino-Americana de Enfermagem*, *28*, e3284–e3284. https://doi.org/10.1590/1518-8345.3820.3284

Lotito, M. A. (2019). *The reformation of historical thought*. Brill. https://doi.org/10.1163/9789004347953

Macaulay, T. (1848). *The history of England from the accession of James the Second*. Macmillan and Co.

Maclean, M., Clegg, S. R., Suddaby, R., & Harvey, C. (Eds.). (2021). *Historical organization studies: Theory and applications*. Routledge. https://doi.org/10.4324/9781003033592

Maclean, M., Harvey, C., & Clegg, S. R. (2016). Conceptualizing historical organizational studies. *Academy of Management Review*, *41*(4), 609–632. https://doi.org/10.5465/amr.2014.0133

Maclean, M., Harvey, C., & Clegg, S. R. (2017). Organization theory in business and management history: Current status and future prospects. *Business History Review*, *91*(3), 457–481.

Maclean, M., Harvey, C., Sillince, J. A. A., & Golant, B. D. (2014). Living up to the past? Ideological sensemaking in organizational transition. *Organization*, *21*(4), 543–567. https://doi.org/10.1177/1350508414527247

Maclean, M., Harvey, C., Suddaby, R., & Clegg, S. R. (2021). Historical organization studies. Advancing new directions for organizational research. In M. Maclean, S. R. Clegg, R. Suddaby, & C. Harvey (Eds.), *Historical organization studies: Theory and applications* (pp. 3–22). Routledge.

Magnusson, S. G., & Szijarto, J. M. (2013). *What is microhistory? Theory and practice*. Routledge. https://doi.org/10.4324/9780203500637

Majumdar, R. (2018). Postcolonial history. In M. Tamm & P. Burke (Eds.), *Debating new approaches to history* (pp. 49–74). Bloomsbury Publishing. https://doi.org/10.5040/9781474281959.0007

March, J. G., & Olsen, J. P. (1975). The uncertainty of the past: Organizational learning under ambiguity. *European Journal of Political Research*, *3*, 147–171.

March, J. G., & Simon, H. A. (1958). *Organizations*. Wiley.

Marquis, C., & Tilcsik, A. (2013). Imprinting: Toward a multilevel theory. *The Academy of Management Annals*, *7*(1), 193–245.

Martin de Holan, P., & Phillips, N. (2004). Remembrance of things past? The dynamics of organizational forgetting. *Management Science*, *50*(11), 1603–1613.

Masataka, B. (1966). Review of *"Kindai Nit-Chū kōshōshi no kenkyū ni tsuite"* 近代日中交渉史の研究について. *"Tōyō bungaku kenkyū" 15*, by K. SANETŌ & さねとうけいしゅう. *Revue Bibliographique de Sinologie, 12/13*, 39–40. http://www.jstor.org/stable/24612916

Masi, F. (2016). Concepts of time in Husserl. In F. Santoianni (Ed.), *The concept of time in early twentieth-century philosophy* (pp. 59–76). Springer.

McDonald, T. J. (1996). *The historic turn in the human sciences*. University of Michigan Press.

Merriam-Webster. (n.d.). Distant. (n.d.). In Merriam-Webster.com dictionary. Retrieved January 13, 2020, from https://www.merriam-webster.com/dictionary/distant

Merton, R. K. (1968). The Matthew effect in science. *Science*, *159*, 56–63.

Miller, T. R., & Lemons, M. A. (1998). Breaking the glass ceiling: Legends from a management pioneer. *S.A.M. Advanced Management Journal*, *63*(1), 4–9.

Mills, A. J. (2017). Getting down and dirty: Microhistory from the ANTi-history perspective. *Workplace Review*, Spring Special Issue, 18–26.

Mills, A. J., Suddaby, R., Foster, W., & Durepos, G. (2016). Re-visiting the historic turn 10 years later: Current debates in management and organizational history. *Management & Organizational History*, *11*(2), 67–76.

Mills, A., & Novicevic, M. (2020). *Management and organizational history: A research overview*. Routledge.

Mills, J. H., & Mills, A. J. (2021). Guest editorial: Special issue on debates in management history. *Journal of Management History*, *27*(1), 1–7.

Minegishi, M., Viereck, W., & Kawaguchi, Y. (Eds.). (2011). *Corpus-based analysis and diachronic linguistics*. John Benjamins.

Mink, L. (1987). *Historical understanding*. Cornell University Press.

Mirvis, P., Albers Mohrman, S., & Worley, C. (2021). *How to do relevant research: From the ivory tower to the real world*. Edward Elgar.

Mitchell, R. (2000). *Picturing the past: English history in text and image, 1830–1870*. Oxford University Press.

Mollan, S. (2019). Phenomenal differences. Varieties of historical interpretation in management and organization studies. *Qualitative Research in Organizations and Management: An International Journal*, *14*(4), 498–516.

Morlacchi, P. (2021). The performative power of frictions and new possibilities: Studying power, performativity and process with Follett's pragmatism. *Organization Studies*, *42*(12), 1863–1883.

Mullaney, S. (1996). Discursive forums, cultural practices: History and anthropology in literary studies. In T. J. McDonald (Ed.), *The historic turn in the human sciences*. University of Michigan Press.

Munn, N. (1992). The cultural anthropology of time: A critical essay. *Annual Review of Anthropology*, *21*, 93–123.

Nagy, P. (2018). History of emotions. In M. Tamm & P. Burke (Eds.), *Debating new approaches to history* (pp. 189–216). Bloomsbury Publishing. https://doi.org/10.5040/9781474281959.0012

Nissley, N., & Casey, A. (2002). The politics of the exhibition: Viewing corporate museums through the paradigmatic lens of organizational memory. *British Journal of Management*, *13*, S35–S45. https://doi.org/10.1111/1467-8551.13.s2.4

Noguchi, T. (1960). 日本資本主義経営史 戦前篇 ("Nihon shihon shugi keieishisen zenpen," *History of capitalist management in prewar Japan*). Ochanomizu Shobo.

Novicevic, M. M., Marshall, D. R., Humphreys, J., & Seifried, C. (2019). Both loved and despised: Uncovering a process of collective contestation in leadership identification. *Organization*, *26*(2), 236–254. https://doi.org/10.1177/1350508418812567

Ogbanna, E., & Harris, L. C. (2001). The founder's legacy: Hangover or inheritance. *British Journal of Management*, *12*, 13–31.

Oxford Reference. (n.d.). Historic turn. Retrieved December 8, 2021, from https://www.oxford reference.com/view/10.1093/oi/authority.20110803095938839

Parker, P. (1995). Most quoted – least heeded: The five senses of Follett. In P. Graham (Ed.), *Mary Parker Follett, prophet of management: A celebration of writings from the 1920s* (pp. 282–290). Beard Books.

Parsons, T. (1951). *The social system*. Free Press.

Podolny, J. M. (2005). *Status signals: A sociological study of market competition*. Princeton University Press.

Poor, S., Novicevic, M. M., Humphreys, J. H., & Popoola, I. T. (2016). Making history happen: A genealogical analysis of Colt's rhetorical history. *Management & Organizational History*, *11*(2), 147–165. https://doi.org/10.1080/17449359.2016.1151361

Pütz, M., & Mundt, N. (2018). *Expanding the linguistic landscape: Linguistic diversity, multimodality and the use of space as a semiotic resource*. Channel View Publications.

Quenet, G. (2018). Environmental history. In M. Tamm & P. Burke (Eds.), *Debating new approaches to history* (pp. 75–100). Bloomsbury Publishing. https://doi.org/10.5040/9781474281959.0008

Ragin, C. C., & Becker, H. S. (Eds.). (1992). *What is a case? Exploring the foundations of social inquiry*. Cambridge University Press.

Ravasi, D., Rindova, V., & Stigliani, I. (2019). The stuff of legend: History, memory, and the temporality of organizational identity construction. *Academy of Management Journal*, *62*(5), 1523–1555. https://doi.org/10.5465/amj.2016.0505

Ravasi, D., & Schultz, M. (2006). Responding to organizational identity threats: Exploring the role of organizational culture. *Academy of Management Journal*, *49*(3), 433–458.

Reck, E. (Ed.). (2013). *The historical turn in analytic philosophy*. Palgrave Macmillan.

Ross, S. J., & Perkins, E. J. (1986). Integrating business history and labor history. *Business and Economic History*, *15*, 43–52. http://www.jstor.org/stable/23702859

Rotherham, I. (2011, April). Nature's end: History and the environment. *Environmental History*, *16*(2), 342–343. https://doi.org/10.1093/envhis/emr014

Rowlinson, M. (2004). Historical perspectives in organization studies: Factual, narrative, and archaeo-genealogical. In D. E. Hodgon & C. Carter (Eds.), *Management knowledge and the new employee* (pp. 8–20). Ashgate.

Rowlinson, M., & Hassard, J. (1993). The invention of corporate culture: A history of the histories of Cadbury. *Human Relations, 46*, 299–326

Rowlinson, M., Hassard, J., & Decker, S. (2014). Research strategies for organizational history: A dialogue between historical theory and organization theory. *Academy of Management Review*, *39*(3), 250–274. http://dx.doi.org/10.5465/amr.2012.0203

Rusen, J. (2020). A turning point in theory of history: The place of Hayden White in the history of metahistory. *History and Theory*, *59*(1), 92–102. https://doi.org/10.1111/hith.12147

Schad, J., & Bansal, P. (2018). Seeing the forest and the trees: How a systems perspective informs paradox research. *Journal of Management Studies*, *55*, 1490–1506. https://doi.org/10.1111/joms.12398

Schein, E. H. (2010). *Organizational culture and leadership* (4th ed.). Jossey-Bass.

Schultz, M., & Hernes, T. (2013). A temporal perspective on organizational identity. *Organization Science*, *24*, 1–21. https://doi.org/10.1287/orsc.1110.0731

Schultz, M., & Hernes, T. (2020a). Temporal interplay between strategy and identity: Punctuated, subsumed, and sustained modes. *Strategic Organization, 18*(1, 2), 106–135. https://doi.org/10.1177/1476127019843834

Schultz, M., & Hernes, T. (2020b). Translating the distant into the present: How actors address distant past and future events through situated activity. *Organization Theory*, *1*, 1–20.

Schutz, A. (1967). *Phenomenology of the social world*. Trans. G. Walsh & F. Lehnert. Northwestern University Press. (Originally published in 1932)

Schwandt, D. R. (1993). *Organizational learning: A dynamic integrative construct*. Unpublished manuscript, George Washington University, Washington, DC.

Schwandt, D. R. (1997). Integrating strategy and organizational learning: A theory of action perspective. *Advances in Strategic Management*, *14*, 337–360.

Schwandt, D. R., & Marquardt, M. J. (2000). *Organizational learning: World class theories to global best practices*. St. Lucie Press.

Schwartz, B. (1991a). Iconography and collective memory: Lincoln's image in the American mind. *The Sociological Quarterly*, *32*(3), 301–319. https://doi.org/10.1111/j.1533-8525.1991.tb00161.x

Schwartz, B. (1991b). Social change and collective memory: The democratization of George Washington. *American Sociological Review, 56*(2), 221–236. https://doi.org/10.2307/2095781

Schwartz, B. (2000). *Abraham Lincoln and the forge of national memory*. University of Chicago Press.

Schwartz, B. (2005). The new Gettysburg Address: Fusing history and memory. *Poetics*, 33, 63–79.

Serafeim, G. (2018). Facebook, BlackRock, and the case for purpose-driven companies. *Harvard Business Review*. https://hbr.org/2018/01/facebook-blackrock-and-the-case-for-purpose-driven-companies

Sheep, M. L., Fairhurst, G. T., & Khazanchi, S. (2017). Knots in the discourse of innovation: Investigating multiple tensions in a reacquired spin-off. *Organization Studies*, *38*, 463–488.

Shrivastava, P. (1983). A typology of organizational learning systems. *Journal of Management Studies*, *20*(1), 7–28.

Sklokin, V., & White, H. (2012). It is not so much a paradigm shift as a total breakdown . . . A conversation with Prof. Hayden White. *Historians*. http://www.historians.in.ua/index.php/en/intervyu/258-it-is-not-so-much-a-paradigm-shift-as-a-total-breakdown-a-conversation-with-prof-hayden-white

Smith, A., & Simeone, D. (2017). Learning to use the past: The development of a rhetorical history strategy by the London headquarters of the Hudson's Bay Company. *Management and Organizational History*, *12*(4), 334–356.

Smith, D. (1987). *The everyday world as problematic: A feminist sociology*. Northeastern University Press.

Smith, W., & Lewis, M. (2011). Toward a theory of paradox: A dynamic equilibrium model of organizing. *Academy of Management Review, 36*. https://doi.org/10.5465/AMR.2011.59330958

Spiegel, G. (Ed.). (2005). *Practicing history: New directions in historical writing after the linguistic turn*. Routledge.

Stout, M., & Love, J. M. (2014). The unfortunate misinterpretation of Miss Follett. *Public Voices, 13*(2), 11–32.

Stinchcombe, A. L. (1965). Social structures and organizations. In J.G. March (Ed.), *Handbook of Organizations* (pp. 142–193). Rand McNally.

Stovall, T. (2018, September). In memoriam: Hayden V. White (1928–2018). *Perspectives on History*. https://www.historians.org/publications-and-directories/perspectives-on-history/september-2018/hayden-v-white-(1928%E2%80%932018)

Sturken, M. (1997). *Tangled memories: The Vietnam War, the AIDS epidemic, and the politics of remembering*. University of California Press.

Suddaby, R. (2016). Toward a historical consciousness: Following the historic turn in management thought. *Management*, *19*, 46–60.

Suddaby, R., Coraiola, D., Harvey, C., & Foster, W. (2020). History and the micro-foundations of dynamic capabilities. *Strategic Management Journal*, *41*, 530–556.

Suddaby, R., Foster, W. M., & Quinn Trank, C. (2010). Rhetorical history as a source of competitive advantage. *Advances in Strategic Management, 27*, 147–173. https://doi.org/10.1108/S0742-3322(2010)0000027009

Tessier, R., & Tellier, Y. (2011). *Méthodes d'intervention. Tome 8: Développement organisationnel*. Presses de l'Université du Québec.

Thom, D. (2008). What happened to gender and history? Qu'est-il arrivé au genre en histoire? *L'histoire sociale en mutation*, *14*(4). https://doi.org/10.4000/rfcb.5978

Tomich, D. (2011). The order of historical time: The longue durée and micro-history. *Almanack Guarulhos*, *2*, 2–65. https://doi.org/10.1590/2236-463320110204

Usdiken, B., & Kieser, A. (2004). Introduction: History in organization studies. *Business History*, *46*(3), 321–330. https://doi.org/10.1080/0007679042000219166

Van Maanen, J. (1988). *Tales of the field. On writing ethnography*. The University of Chicago Press.

Viadas, C. R. (2015). Historic perspectives from anthropology. Reflections proposed to transcultural nursing. *Investigacion y Educacion en Enfermeria*, *33*(2), 365–373. https://doi.org/10.17533/udea.iee.v33n2a20

Von Ahsen, A., & Gauch, K. (2021). Opportunities and challenges of purpose-led companies: An empirical study through expert interviews. *Corporate Reputation Review*. https://doi.org/10.1057/s41299-021-00122-8

Wadhwani, R. D., Suddaby, R., Mordhorst, M., & Popp, A. (2018). History as organizing: Uses of the past in organization studies. *Organization Studies*, *39*(12), 1663–1683. https://doi.org/10.1177/0170840618814867

Walsh, I. J., & Glynn, M. A. (2008). The way we were: Legacy organizational identity and the role of leadership. *Corporate Reputation Review*, *11*(3), 262–276.

Walsh, J. P., & Ungson, G. R. (1991). Organizational memory. *Academy of Management Review*, *16*(1), 57–91. https://doi.org/10.5465/amr.1991.4278992

Weick, K. E. (1979). *The social psychology of organizing* (2nd ed.). McGraw-Hill.

Wetherell, C. (1999). Historical social network analysis. In L. Griffin & M. Van der Linden (Eds.), *New methods for social history* (International Review of Social History Supplements, pp. 125–144). Cambridge University Press. https://doi.org/10.1017/CBO9780511563874.007

Whetten, D. A. (2006). Albert and Whetten revisited: Strengthening the concept of organizational identity. *Journal of Management Inquiry*, *15*, 219–234.

White, D., & Bednar, D. (1991). *Organizational behavior: Understanding and managing people at work*. Allyn and Bacon.

White, H. (1973). *Metahistory: The historical imagination in nineteenth-century Europe*. Johns Hopkins.

White, H. (1984). The question of narrative in contemporary historical theory. *History and Theory*, *23*(1), 1–33. https://doi.org/10.2307/2504969

White, H. (1987). *The content of the form: Narrative discourse and historical representation*. Johns Hopkins University Press.

Widdersheim, M. (2018). Historical case study: A research strategy for diachronic analysis. *Library & Information Science Research*, *40*(2), 144–152. https://doi.org/10.1016/j.lisr.2018.06.003

Wood, I. (2013). *The modern origins of the Early Middle Ages*. Oxford.

Zachariah, B. (2013). Postcolonial theory and history. In N. Partner & S. Foot (Eds.), *The Sage handbook of historical theory* (pp. 378–396). Sage. https://doi.org/10.4135/9781446247563.n23

Zald, M. N. (1993). Organization studies as a scientific and humanistic enterprise: Toward a reconceptualization of the foundations of the field. *Organization Science*, *4*(4), 513–528.

Zald, M. N. (1996). More fragmentation? Unfinished business in linking the social sciences and the humanities. *Administrative Science Quarterly*, *41*, 251–261.

List of Figures

List of Tables

About This Series

De Gruyter Studies in Organizational and Management History is a new book series that aims to make significant and timely contributions to the fields of organizational and management history. This series was developed in response to a need for a dedicated platform to shape a more unified field across organizational and management history. This platform will stimulate cross-disciplinary dialogue and enable new directions of research and conceptualization to crystallize and come to fruition. The primary audience for this series is academic researchers and students in organizational and management history from a wide range of disciplines, including business, organizational studies, sociology, history, art history, gender studies, and political science.

The goal of this series is to feature new and promising studies in ways that encourage authors to reflect critically on their positioning within the field. We welcome studies that sit squarely in management history as well as studies that expand our understanding of organizational history and identity. We particularly encourage submissions that result from interdisciplinary collaborations and that utilize innovative methodological tools. We are committed to representing diverse voices, making available the important scholarship coming out of underrepresented academic centers, and being a home for the global community of scholars in organizational and management history.

Index