**TRADITION IN ORGANIZATIONS:**
**A CUSTODIANSHIP FRAMEWORK**

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## ABSTRACT

The study of tradition has become increasingly important in management research explaining phenomena as diverse as socialization, identity, institutional maintenance, and field-level change. While recent studies bring new insights, management scholars' conceptualization of tradition suffers from a lack of theoretical integration. In this paper, we identify the major perspectives on tradition used in the literature and propose an integrative "custodianship framework" that encourages researchers to examine stability and change in organizational traditions by considering the perspectives, interests, and power of custodians surrounding a tradition over time. We suggest that future research explicitly consider the importance of place as both the rootedness and emplacement of traditions motivate the need for custodianship.

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## INTRODUCTION

Existing research on traditions draws from work in cultural anthropology and geography, history, sociology, and organizational studies and includes studies of a diversity of traditions across geographic and cultural contexts, industries/sectors and organizations. While this diverse attention has its benefits, the literature has yet to come together around a common definition or framework. For some, traditions are invented as a means of control (Hobsbawm, 1983; Soares, 1997) and for others they represent institutionalized practices (Dacin & Dacin, 2008) or resources (Soares, 1997). In our earlier work, we adopt the definition of traditions as "living social arrangements in organizations infused with value and meaning derived from interpretations of the past" (Dacin & Dacin, 2008; Soares, 1997).

While at a general level, traditions may be grouped under the general classification of cultural practices, it remains important to view culture and its practice as "theoretically related, but empirically distinct" from tradition (Giorgi, Lockwood & Glynn, 2015). Research on tradition has its own established literature with early beginnings in the social sciences (Durkheim, 1912/2008; Weber, 1958) followed by early organizational culture research (Barley, Meyer, & Gash, 1988; Deal & Kennedy, 1982; Trice & Beyer, 1984;) and continuing to the present with a greater appreciation for the distinctiveness of tradition as a construct in the organizational and social sciences (Dacin & Dacin, 2008; Dacin, Munir & Tracey, 2010Di Domenico & Phillips, 2009; Hobsbawm & Ranger, 1983; Lockwood & Glynn, 2016; Shils, 1981; Soares, 1997; Swidler, 1986; Trevor-Roper, 1983Weber & Dacin, 2011).

There are a number of reasons why the literature on traditions has yet to come together around a central framework. First, much of the existing empirical research studies a variety of idiosyncratic contexts ranging from culinary and dining traditions (DeSoucey, 2010, Dacin et al., 2010; Douglas, 1972) to music (Eyerman & Jamison, 1998; Johnson, 2007) to dress (Trevor-Roper, 1983) to organizational brands (Foster et al., 2011; Rowlinson & Hassard, 1993) and to interorganizational structures (Anand & Jones, 2008; Hibbert & McQuade, 2005; Hibbert & Huxham, 2010; Howard-Grenville, Metzger, & Meyer, 2013). The sheer diversity of idiosyncratic contexts makes it difficult to provide widely generalizable understandings.

Second, the studies span levels of analysis, including group, organizational, and societal levels (e.g., Collins, 2004; Dacin et al., 2010; Fine & Hallett, 2014; Howard-Grenville et al, 2013). While historically traditions were studied at the macro-level (DeSoucey, 2010; Shils, 1981; Trever-Roper, 1983), recent work examines traditions as micro-level practices utilized by actors as a strategic resource (Lockwood & Glynn, 2016). In turn, management scholars have tended to focus on organizational-level traditions (Dacin et al., 2010; Dacin & Dacin, 2008; Di Domenico & Phillips, 2009; Johnson, 2007). These differences in the scale of researchers' focii makes it unclear as to how insights about tradition across studies can inform each other.

Third, studies also differ on the perspective offered—whether describing traditions as experienced by organizational newcomers (Dacin et al., 2010; Tracey, 2016) and subordinates (Rosen, 1985; 1988), by the actors creating and maintaining them (Dacin & Dacin, 2008), or by external observers (Anand & Watson, 2004). Moreover, some studies focus on the organizational outcomes created by traditions (Rosen, 1988; Trice & Beyer, 1984) while others on the stability and change in traditions over time (Dacin & Dacin, 2008; Howard-Grenville et al., 2013).

Finally, organizational culture research provides a conceptualization of traditions as part

of an organization's stock of intangible resources (Weber & Dacin, 2011). Alongside routines (Eggers & Kaplan, 2013) and frames (Cornelissen & Werner, 2014), traditions serve as material that organizational actors assemble and deploy to support desired identities, images, memories, and boundaries (Fine & Hallett, 2014; Foster, Suddaby, Minkus & Wiebe, 2011; Howard-Grenville et al., 2013; Schultz & Hernes, 2010; Walsh & Glynn, 2008). As such, researchers sometimes treat traditions as indistinguishable from routines and frames.

Because of these varied interests, contexts and findings, it is difficult for management researchers to deduce what is already known about organizational traditions and what important research questions remain. Particularly, it is unclear to what extent the different perspectives across the literatures make complementary or incompatible claims about how organizational traditions emerge, their nature, and their effects.

Our view is that tradition is a phenomenon both distinct and meritorious of management scholars' attention. Research across the social sciences demonstrates that tradition is neither disappearing from, nor at odds with, the emergence of modern societies (Soares, 1997; Shils, 1981; Shoham, 2011). Recent work among management theorists also demonstrates that tradition has much more potential as a separate construct than simply an undifferentiated subset of culture and socialization studies (Dacin & Dacin, 2008; Foster et al., 2011). First, research on tradition highlights important mechanisms of custodianship and transmission, thus providing insight on the persistence of collective organizational phenomena across generations. Increasingly, management researchers across a number of domains demonstrate how the stability of institutions, identities, and other social arrangements in organizations relies on ongoing forms of custodial work (Dacin & Dacin, 2008; Dacin et al., 2010; Lok & de Rond, 2013). Moreover, studies of revival encourage management scholars to adopt a longer-term view of phenomena

such as institutions and identities, demonstrating that what appear to be extinct characteristics of an organization can re-emerge years or even decades later (Birnholtz et al., 2007; Dacin & Dacin, 2008; Howard-Grenville et al., 2013).

In light of this, we examine tradition in its own right with a focus on the role of custodianship in the creation and maintenance of traditions. We do this in two ways. First, we take a historical approach to examine the evolution of the construct of tradition. In doing so, we articulate two views on tradition—as constraint and as resource. Second, we elaborate a custodianship framework describing the work of custodians in the creation, maintenance and decline of traditions over time. Custodians are vested actors (individual or collective) who seek to maintain institutionalized practices such as traditions (Dacin & Dacin, 2008; Soares, 1997). But what is entailed in custodial work and how is it performed? For institutional theorists, insights on the micro-dynamics of organizational life reveal that even the most institutionalized rules, norms, practices and beliefs are likely to break down or erode without ongoing custodial work (Lawrence & Suddaby, 2006; Powell & Colyvas, 2008). Hence, custodianship is central to understanding both institutional change and maintenance (Dacin et al, 2010; Lok & de Rond, 2013; Rojas, 2010).

Through our approach, we bring coherence to decades of disparate research from diverse domains including anthropology, geography, history, sociology, and organizational studies on the topic of traditions that span group, organizational, field, and societal levels of analysis. Specifically, we compare and contrast major themes in the literature as a basis for providing an orientation for organizational scholars. From this review, our custodianship framework organizes the literature by providing insights into how traditions emerge, transform and are maintained over time. We end with a set of future research directions.

**UNDERSTANDING TRADITION: TWO VIEWS**

In this section, we review the literature on traditions to provide an overview of the current level of understanding across a variety of literature streams. For quick reference, we capture this review in Table 1. The Table outlines two general perspectives, *tradition-as-constraint* and *tradition-as-resource*, that we discuss throughout our review. In addition, the columns of the table highlight the various theoretical approaches, foci, levels of analysis, and representative publications in each of these literature streams.

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Insert Table 1 Here

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**Backdrop: From the Age of Enlightenment to Romanticism**

On October 24, 1793, France adopted the Republic Calendar. The move was part of the revolutionary government's efforts to erase remnants of the Ancien Régime which represented, for many Enlightenment thinkers, arbitrary authority and deference to custom (Kramnick, 1995). Intending to replace the ancient divisions of time which France had inherited with a more rational system, the Republic Calendar used decimal time: each day was divided into ten hours, each hour into 100 minutes, and each minute into 100 seconds; the names of the months, abandoning their roots in Greco-Roman festivals and folklore, took on descriptors of prevailing weather patterns in Paris. Against the Roman Catholic Church which had sanctioned the Ancien Régime as a divine monarchy, revolutionaries converted the Notre-Dame de Paris, Pantheon, and other churches across France to "Temples of Reason" for a new state-sponsored religion centered on devotion to reason and liberty (Carlyle, 2005). Culminating in the French Revolution, the political and intellectual upheavals of the 18th century provide a backdrop to highlight two

opposing views of tradition (Berlin, 1999), each of which would dominate different periods and subfields of philosophy, social science, and management theory in later ages—we label these 'tradition as *constraint'* and 'tradition as *resource*.'

What we call a *tradition-as-constraint* view is that championed by Enlightenment thinkers seeking to break continuity with the past, and later adopted by early sociologists and anthropologists differentiating modern from pre-modern societies. Scholars with a tradition-as-constraint approach see tradition as antithetical to modernity and occasionally something maintained by the elites to protect their status in society (Eisenstadt, 1973; Hobsbawm & Ranger, 1983; Kant, 1783/2004; Weber, 1978). The underlying assumption of these thinkers, we suggest, is of *traditions as relatively static entities which constrain or transform passive participants*. By contrast, what we call a *tradition-as-resource* view, championed by the Counter-Enlightenment and, afterwards, by more recent scholarship in sociology and management, characterizes *traditions as dynamic resources managed by active and vested participants who we term 'custodians'*. Scholars taking a tradition-as-resource view portray traditions as something that co-exists with modernity (Burke, 1790; Shils, 1981, Soares, 1997; Weber & Dacin, 2011).

As we describe the rise and fall of these two perspectives over two centuries of scholarship, we highlight their opposing assumptions about how participants engage with tradition. We suggest that neither a *tradition-as-constraint* nor a *tradition-as-resource* view on their own, offer an adequate explanation of the growing empirical recognition that actors can change traditions and that traditions change actors over time. We show how to derive a fuller understanding of tradition through integration of these two perspectives, and by using participants' custodial roles as boundary conditions on statements about whether actors change

traditions or vice versa, whether traditions constrain or enable action, whether traditions are static or dynamic, and why traditions persist across generations.

***Tradition in the Enlightenment and Counter-Enlightenment***: The philosophers, advocates, and political leaders of the Enlightenment framed the negative connotations of tradition, equating tradition with ignorance, superstition, and inequality (Kramnick, 1995). Despite their differences, many Enlightenment thinkers agreed that true knowledge was derived from humanity's use of reason and investigation of natural phenomena, and that greater understanding of natural laws could bring about societies living in greater peace and prosperity (Berlin, 1999, p. 112). In the minds of these thinkers, traditions were simply beliefs, norms, and social arrangements originating from, and defended by mystery or custom (Kramnick, 1995). Consequently, uncritical acceptance of tradition, was a barrier to pure knowledge (Kant, 1783/2004); aristocrats and clerics, moreover, benefitting from dogma, use tradition to defend their authority against those in society who would push for equality and liberty (Berlin, 1999). In these views, tradition served to hold people back from knowledge and liberty. Consequently, our characterization of this view is a tradition-as-constraint approach to tradition.

Edmund Burke (1729-1797) stood as a counterpoint to this constraint-based view of tradition in the Age of Enlightenment (Kramnick, 1995). For Burke, tradition (or as Burke called it, "prejudice") represented wisdom accumulated through generations that guided societies through emerging challenges, and was something in need of conservation (Burke, 1790; Jacobs, 2007; Soares, 1997). As Jacobs summarizes, "Burke warned against allowing traditions to be rationally assessed by the individual whom he saw as likely to misappreciate them and to result in their being rashly overturned" (Jacobs, 2007, p. 142). While Burke was an early proponent of what we characterize as a tradition-as-resource view, this view appears to have remained a

minority intellectual viewpoint for most of the 18<sup>th</sup> century (Kramnick, 1995). By the end of the century, however, a diverse but growing group of philosophers, artists, and theologians began to lead a sustained critique against the ideals of the Enlightenment (Russell, 2004).

From the Counter-Enlightenment came ideas about tradition as a collective resource which would have profound effects on the political, intellectual, and artistic developments of 19<sup>th</sup> and 20<sup>th</sup> Europe (Berlin, 1999). Where Enlightenment thinkers had championed rationalism, cosmopolitanism, and universalism, the Counter-Enlightenment championed revelation, rootedness, and custom (Berlin, 1999). Among the fiercest critics of the Enlightenment and French Revolution was a Savoyard philosopher, Joseph de Maistre (1753-1821) (Berlin, 2013). Tradition to de Maistre meant the sacred hierarchy of church and monarchy. Enlightenment circles had espoused the view that the universe was governed according to discoverable laws, awareness of which would bring social progress. In de Maistre's view, the empirical search for universal laws had brought neither truth nor progress (de Maistre, 1796/1994).

While de Maistre's philosophy is less popular today, the Sturm und Drang and Romantic movements emerging in Germany and spreading across Europe at the time would bring about a lasting affirmation of tradition as a collective resource (Berlin, 1999). For German philosopher Johann Gottfried Herder (1744-1803), one of the fundamental needs of a human being is self-expression (Berlin, 1999). The tools for expression—language, symbols, institutions, and folklore—represent the creations of people who lived in particular social and material contexts attempting to communicate with each other (Herder, 2003). In Herder's view, to be immersed in a shared cultural tradition was necessary to genuinely express one's self. To leave one's roots by entering a cosmopolitan context was to be cut off and to have one's creative powers weakened (Berlin, 1999).

Opposite to Enlightenment philosophers' assumption that tradition constrained humans from meaningful social action (in their view, *rational* behavior), Herder had proposed that tradition was a necessary input for meaningful social action (in his view, *expression*) (Berlin, 1999; Herder, 2003). Later Romantics championing the latter view re-evaluated the worth of local tradition across the arts – including poets like William Wordsworth and Samuel Taylor Coleridge (1798/2007), painters like John Constable and Caspar David Friedrich, and musical composers like Frédéric Chopin, Edvard Grieg, and Richard Wagner (Wagner, 1849).

While folk tradition had been viewed with some disdain by Enlightenment thinkers, Romantics acclaimed it as the noble and authentic expression of national culture (Berlin, 1999). They did not eagerly anticipate the demise of tradition, but treated it as an endangered resource, its carriers being peasants in the countryside who, unlike the intellectual elites, had not been tainted by cosmopolitan salon life (Berlin, 1999). Compiled collections of folk songs, stories, and poetry gained popularity and served to guide national identity movements while artists began to incorporate elements of peasant culture into symphonies and paintings. Coming in a period of nationalism then, Romantic artists came to associate tradition with a "volk", or what we might describe in less poetic terms, a societal level of analysis (Herder, 2003; Lönnrot, 1999; Wagner, 1849).

By the mid-to-late 19th century, the tide began to turn against tradition with movements such as modernism in the arts, positivism in philosophy, and growing optimism about scientific and technological progress (Russell, 2004). It was around this time that modern social science emerged, embodying not the Counter-Enlightenment's idealization of tradition as an endangered resource, but the old idea that society would progress through the empirical discovery of universal laws (Comte, 1865). Thus, the seminal works of modern social science would treat

traditions as relatively static entities more or less synonymous with 'culture', portraying their adherents as passive participants rather than active and strategic agents (Soares, 1997).

**In the Context of Modernization Theory: Tradition as a Constraint**

The foundations of social scientific thought on tradition at the turn of the 20$^{th}$ century was set by sociologists and anthropologists who witnessed rapid societal change (Eisenstadt, 1973; Soares, 1997). In this context, foundational writings tended to adopt a macro-level perspective in which tradition was seen to be synonymous with the culture of the community, society, or civilization (Shoham, 2011). Except in a few cases where elite actors are discussed, absent in these works is the idea of individuals or social groups actively engaged in custodial work to maintain traditions thereby ensuring their continuity over time (Soares, 1997).

Early anthropologists distinguished between the static "traditional" societies in which they did fieldwork and the changing "modern" societies from which they arrived (Jacobs, 2007). Social scientists studying industrializing societies took a similar approach in portraying tradition as a totality. For mainstream sociology however, tradition in industrial societies was either relatively unimportant, because it was in rapid decline, or anti-modern, because it restrained modernization (Eisenstadt, 1973; Soares, 1997). In a variation, researchers taking a critical perspective have proposed that many traditions that appear old are in fact relatively modern 'invented traditions' used by societal elites to legitimate status hierarchies (Hobsbawm & Ranger, 1983). Political scientists, meanwhile, associated traditions with the sum of a community's culture, values, and institutions, using these to explain modernization, international relations, and enduring differences between civilizations (Eisenstadt, 1973; Huntington, 1993; 1997).

Both the functional and critical streams informed management scholarship, particularly the "first wave" of organizational culture research (Trice & Beyer, 1993; Weber & Dacin, 2011) and critical management theory, respectively. A tradition-as-constraint perspective, though sometimes discounting the importance of tradition as a social phenomenon, provides valuable insights about how traditions can constrain or mold actors. The idea that traditions could serve as "rites" enabling actors to change status, especially in a social system, would become important on research in organizational culture and socialization (Trice & Beyer, 1993). Below, we describe the functional and critical streams and their influence on management research. In the sections afterward, we describe social scientists' effort to reconceptualize tradition, and the emergence of a tradition-as-resource view in management.

*Functional streams in the social sciences and management theory*: Sociological thought on tradition was heavily influenced by Emile Durkheim and Max Weber at the turn of the 20th century, who both emphasized the loss of traditional social relations in modernizing societies (Soares, 1997). In his earlier work, Durkheim (1893/2014) contrasted the "mechanical solidarity" that integrated individuals in traditional societies through cultural similarity and close contact, with the "organic solidarity" that he argued formed the basis for integration of individuals in modern societies through a division of labor.

In his later work, Durkheim (1912/2008) presented a continuing role for tradition in the context of religion. He described religion as shared beliefs and rites concerning the sacred through which members of a society enacted to periodically reaffirm their commitment to a shared moral ideal. Though Durkheim saw traditional religious symbols and cosmological explanations losing their potency in modernity, he suggested new rites would emerge from societies' continuing need to build collective sentiment.

Weber (1905/2010) also saw tradition as an important historical force, linking religious traditions with economic organization – most famously associating the Protestant ethic with the development of capitalism. However, Weber saw rationalization as a dominant force in modern society: the replacement of customary or habitual behavior with legal-rational rules (1978). By associating tradition with customary behavior, something present only in the absence of reflection, Weber's work implied to social scientists that tradition had diminishing importance in modernizing societies (Jacobs, 2007; Shoham, 2011).

Among anthropologists, Van Gennep (1909/1961) provides an important exception to studies that separate 'traditional' and 'modern' societies. Van Gennep proposed that societies ranging from small-scale tribes, to ancient Greece and Rome, to modern industrial societies contained numerous traditions which served as "rites of passage", ceremonies that "enable the individual to pass from one defined position to another which is equally well defined… birth, childhood, social puberty, betrothal, marriage, pregnancy, fatherhood, initiation into religious societies, and funerals" (1909/1961, p. 3). Drawing an analogy between ancient and modern practices, Van Gennep's rites of passage model proposed deeper continuities exist between social groups that could appear dissimilar in other ways: that both tribal societies and modern organizations, for instance, had basic functions that required some sort of ceremony to fulfill, such integrating or expelling members, confirming changes of relationships between members, and the like.

Providing a method for analyzing cultural rites and their impact on social groups, the rites of passage model would be embraced by researchers seeking to decipher corporate rituals in early organizational culture research (Trice & Beyer, 1984). Trice and Beyer (1969; 1984; 1993) used Van Gennep's (1909/1961) "rites of passage" model to illustrate how rites and rituals,

resembling those of tribal societies, facilitate essential organizational functions including socialization, renewal, and conflict reduction. Traditions in this model are conceptualized as part of organizational "rites" which ritualistically mark off social transitions, such as "rites of passage" which transition individuals into new social roles (e.g., when outsiders become colleagues during organizational socialization) or "rites of integration" which revive members' sense of belonging to a common social system (e.g., through office parties which temporarily loosen constraints on formality).

While the rites of passage model appears to capture both 'tradition-as-constraint' and 'tradition-as-resource' thinking, we believe it fits more comfortably with a tradition-as-constraint view since it portrays the individuals engaging in rites of passage as relatively passive audiences or participants conforming to a tradition, rather than actively vested agents or custodians who maintain and transform traditions. Nevertheless, through Van Gennep (1909/1961) and Trice and Beyer (1969; 1984), management research's early conceptualization of tradition saw it as something fulfilling important social functions and co-existing with modernity.

Coinciding with Trice and Beyer's work on organizational rites of passage (1984), other management theorists of the 1970s and 1980s adapted ideas and ethnographic methods from anthropology to explore the languages, symbols, and norms of corporate settings (Deal & Kennedy, 1982; Van Maanen, 1999; 2011, Schein, 2010). Much like early anthropologists and sociologists, many of these studies in management did not distinguish traditions as a distinct social phenomenon. Instead, authors tended to treat tradition, along with symbols, values, stories, rites, and rituals, as a subset of an organization's culture (Deal & Kennedy, 1982; Trice & Beyer, 1993). Tradition in this stream was either synonymous with an organization's culture or

established practices, or something that symbolizes an organization's culture (Deal & Kennedy, 1982; Trice & Beyer, 1984).

While pointing to the important functions of organizational rites and rituals, studies in the first wave of organizational culture research seem to fit a tradition-as-constraint view. These studies brought important insights about how traditions mold individuals, groups, and organizations, but gave little attention to how actors in turn shaped traditions over time through agency (Weber & Dacin, 2011). While both practitioner and scholarly work continues the ideas developed in this stream of organizational culture research, tradition is not generally treated as a unique phenomenon or topic of study (Chatman & O'Reilly, 2016).

***Critical streams in the social sciences and organization theory***: Within the tradition-as-constraint theme extending from the foundational works at the turn of the 20th century to more recent management scholarship, researchers' descriptions of tradition ranged from being functional to unimportant to, at its worst, something stifling modernization (Durkheim, 1912/2008; Van Gennep, 1909/1961; Weber, 1905/2010; Shoham, 2011). Alongside these views a more critical stream emphasized traditions as systems of oppression. While Freud characterized tradition as religious sentiments repressed in modern society, and Marxists saw tradition as something to be undermined in their writings, a more elaborate expression of this view emerged from Hobsbawm and Ranger's (1983) edited collection (Soares, 1997). Unlike the previous works described above, this approach gives emphasis to the conscious creation and transmission of traditions, and to their co-existing with modernity.

Hobsbawm (1983) articulates a critical perspective, focusing on 'invented traditions'… "Traditions which appear or claim to be old… [but] are often quite recent in origin" (p. 1). According to this view, societal elites establish traditions in response to historical changes that

undermine their power. Thus, traditions, as a set of symbolic practices governed by custodial elites constituting either overt or tacit rules, serve to socialize non-elites into particular norms and values that protect the elite's status (Hobsbawm, 1983). Still, while challenging the 'coherence' view of tradition in early sociology, neither Hobsbawm nor his co-author Ranger (Hobsbawm and Ranger, 1983) embrace the view that traditions are a resource that all actors can engage with in an open-ended manner. Only small groups of elites in societies are portrayed as active organizers, guardians or custodians of tradition. The mass of non-elite actors, however, is portrayed as passive participants or audiences who have traditions imposed on them and who are transformed (or made docile) by their experiences.

Hobsbawm and Ranger's (1983) view finds some currency among management theorists, either as a direct influence or as something which anticipated researchers' conclusions. Rosen (1985; 1988) for instance, illustrates how traditions such as corporate breakfasts or Christmas parties reinforce status hierarchies in organizations. In this view, traditions allow organizational elites to symbolically communicate members' differences in power and prestige in front of assembled audiences (Di Domenico & Phillips, 2009). Rowlinson and Hassard (1993) draw on the notion of invented traditions to show how organizations selectively reinterpret their pasts to develop desired identities and legitimate policies.

In summary, social scientists during the turn of the 20th century primarily took a tradition-as-constraint approach, an approach which has been taken up more recently by "first wave" organizational culture researchers. To many proponents of this view, tradition represents a coherent whole made up by the sum of institutions, values, and other cultural elements in a society. Except in descriptions of elite actors motivated to maintain systems of hierarchy, there is little sense of custodians. For the most part, traditions in this approach are relatively static

(though eroding) entities which guide and constrain the behavior of passive participants whose actions and beliefs are shaped by the traditions into which they are born. This approach makes tradition difficult to distinguish from culture. Moreover, it suggests tradition is either unchanging, as when anthropologists compared "traditional" societies with "modern" ones, or a force in decline, as when sociologists describe the inevitable (and sometimes desirable) march of societies to modernity (Shoham, 2011).

This is not to say tradition is perceived as having no value or impact on society. As mentioned, Van Gennep (1909/1961) proposed that traditions serve essential functions in society; an idea that was adopted by management researchers giving attention to tradition as part of the organizational culture scholarship in the 1970s and 1980s (Barley et al., 1988; Weber & Dacin, 2011). Critical management theorists also found the notion of 'invented traditions' helpful in describing how elites organize and maintain traditions to defend their social positions in turbulent social contexts (Hobsbawm & Ranger, 1983).

**Reformulations in the Social Sciences and Humanities: Tradition as a Resource**

In this section, our intent is to show how social scientists since the 1950s, moved away from a 'tradition-as-constraint' view to a view that emphasizes traditions as dynamic resources that are actively managed (Eyerman & Jamison, 1998; Gusfield, 1967; Shils, 1981; Soares, 1997; Shoham, 2011; Stinchcombe, 1965; Weber & Dacin, 2011), what we refer to as a 'tradition-as-resource' view. Below, we focus on three themes that characterize a tradition-as-resource approach: emphasis on traditions as changing, multiple and co-existing with modernity; the custodianship of traditions; and the open-ended outcomes of tradition. We provide a short overview of how this reformulated idea of tradition has brought new insights across a variety of social science and humanities subfields, including cultural sociology, economic sociology,

history, folklore studies, the philosophy of science, marketing, and tourism studies—each of which tend to emphasize how traditions enable, rather than constrain social action (Biggart & Beamish, 2003; Belk & Costa, 1998; Bruns, 1991; Chhabra, Healy, & Sills, 2003; Halbawchs, 1992; Kuhn, 1962; Lowenthal, 2015; Redfield, 1960; Zerubavel, 1996). After providing this background, we describe how a tradition-as-resource view influenced and emerged in the field of management after the 1980s.

Our review of the last few decades of research suggests that a tradition-as-resource has become the dominant perspective. Though we believe this perspective comes from a more nuanced analysis of tradition, we also argue that the older tradition-as-constraint view retains valid findings that if abandoned, will lead to a partial and fragmented understanding of the phenomenon. We suggest that integration of the two perspectives is necessary because neither alone accounts for the mutual transformation of actors and traditions in their interaction over time. But first we recount the emerging trends in the tradition-as-resource literature steams.

*Multiple and co-existing traditions*: Beginning in the 1960s, Stinchcombe theorized that the time and place in which an organizational form originated imprinted organizations of that type with an "organizational tradition" surviving into future periods even if its environment later changed (Stinchcombe, 1965, p. 160). Importantly, Stinchcombe explicitly suggested a role for agency and custodianship in the transmission of traditions, stating "The problem is to specify who it is that carries 'tradition' and why they carry it, whose 'interests' become 'vested,' under what conditions, by what devices, whose 'folkways' cannot be changed by regulation, and why" (Stinchcombe, 1965, p. 167). Moreover, this view brought tradition to the field-level, suggesting that multiple traditions can co-exist in society without necessarily forming a coherent whole.

Gusfield (1967) drew on a range of empirical examples to challenge sociological thought since Weber depicted tradition and modernity as polar opposites or tradition as something impeding modernism. Illustrating "fallacies" in prior research, such as assumptions that traditions were unchanging in 'traditional' societies, that a society's tradition formed a coherent whole, or that modernization necessarily weakened tradition, Gusfield promoted the now dominant "co-existence" sociological perspective on tradition (Gusfield, 1967). According to this view, modern social arrangements do not replace traditional ones, but exist alongside each other and have varying relationships, ranging from conflict to mutual reinforcement (Shoham, 2011). While these essays informed future research, it was Shils' (1981) influential theory which distinguished tradition as a phenomenon of study apart from culture or as a peripheral element in studies of modernization.

Shils' (1981) theory defines tradition as any element of past practice or belief that is transmitted ("handed down") by an authority to others who re-enact them for at least three generations. Unlike prior approaches which viewed societal tradition as a coherent unity – and therefore difficult to distinguish from culture, Shils argues that discrete traditions in a society can be identified by spotting both the product (which could be a language, skill, artifact, social arrangement, or idea) and its transmission process. Our characterization of this view is one of tradition as a resource because, here, traditions allow custodians, their communities and members to fulfill various needs ranging from order to creativity to love.

While Weber and early anthropologists equated tradition with unthinking behavior (Shoham, 2011), Shils (1981) portrays adherents of a tradition as active agents or custodians adapting tradition to achieve various goals. The theory distinguishes between 'substantive' traditions such as religion and marriage, which provide stability to societies, and 'creative'

traditions such as science, philosophy, and painting which include rules by which their

practitioners modify them (Jacobs, 2007). While all traditions, according to Shils, contain a

"normativeness of transmission" (i.e., the assumption that they are worthy of acceptance by

future generations), creative traditions inherently encourage adherents to adapt them to suit

emerging needs or discoveries. These actors are then custodians of tradition, that is, individuals

and groups who maintain and adapt traditions because, far from constraining action, traditions

enable them to accomplish important goals.

     Shils' theory of tradition (1981) can be characterized as evolutionary, in that the

traditions that survive are those which adapt to changing environments (Jacobs, 2007).

Importantly, this perspective emphasizes that tradition is not opposed to modernity. Rather,

modernity should be seen as one set of traditions, primarily a creative tradition of rationalization

in large organizations, replacing other, primarily substantive, traditions. Stinchcombe's (1965)

and Shils' (1981) theorizing on tradition, and particularly its emphasis on custodians actively

managing or transmitting tradition, informs more recent treatments of tradition in the social

sciences, with later work refining, critiquing, or applying these ideas (Eyerman & Jamison, 1998;

Jacobs, 2007; Shoham, 2011; Soares, 1997).

     While there is variance in definitions of tradition, more recent perspectives emphasize the

crucial role of custodians—individuals or groups who are vested in the continuity of traditions

and who carry, invent, guide, adapt, and protect them. Despite differences, many of these views

share an interest in how custodians actively and often strategically connect with tradition. In

anthropology, researchers examine tradition as a form of communication within groups, as tacit

knowledge, and as a resource against domination (Boyer, 1992; Douglas, 1972; Phillips &

Schochet (2004). In the field of history, Lowenthal (2015) advanced the view that societies

continually reinterpret their pasts, sometimes stagnating social change, at other times encouraging groups to imagine new possibilities; the past may be various portrayed as similar or different compared to the present, and motives for interpreting the past range from political to aesthetic.

*Traditions as actively managed resources*: Within sociology, several researchers challenge the 'invented tradition' approach by theorizing how actors creatively use and adapt traditions. Eyerman and Jamison (1998), for example, emphasize that traditions involve "conscious articulation" … "it is the conscious articulation—the process of naming, defining, and making coherent—which distinguishes tradition from custom or habit, which are similar in that they all deal with recurrence" (Eyerman & Jamison, 1998, p. 27). By defining tradition as conscious behaviour, Eyerman and Jamison's definition explicitly excludes earlier sociological and anthropological views that conflated tradition with culture, values, or institutions.

Tradition drives social action because it provides rules and resources—there are musical traditions, social movement traditions, and many others, which actors can use to communicate, to organize, and create community. Like composing a new work in a musical genre, custodians must embellish traditions to some degree in order to rejuvenate them and create new meaning but must follow at least some rules in order to be understood. Likewise, Eyerman and Jamison (1998) see tradition co-existing with modernity. Traditions survive in modern societies, but with the breakdowns of national and local communities, individuals have greater opportunities to self-select into cultural traditions which fulfill their needs for identity and group belongingness: "Traditions in today's world are usually selected rather than imposed… The selection of tradition has become ever more individualized and transitory" (Eyerman & Jamison, 1998, p. 30). In this regard, custodians facilitate both the selection and enactment of traditions. Finally, Eyerman and

Jamison's (1998) view of tradition represents growing agnosticism about the origins of tradition—rather than distinguishing between 'authentic' and 'invented' traditions, Eyerman and Jamison (1998) note that all traditions are created by an individual or a collective custodian, though the motives and whether the tradition emerged from a systematic effort varies. For example, in their study of the Texas A & M Aggie Bonfire, Dacin & Dacin (2008) show that traditions can emerge via serendipity rather than conscious articulation.

Arguing that "tradition, precisely defined, should be one of the ways sociologists understand the logic of social action, group identity, and collective memory", Soares (1997, p. 6) lamented that most sociologists had either ignored the role of tradition, like the early sociologists or, like Shils, treated it too broadly as anything displaying continuity. What is unique about tradition, Soares (1997) argues, is that custodians are 'self-conscious' about their attempts to show responsibility to 'the past as well as the future'. Like Eyerman & Jamison (1998), Soares' (1997) definition acknowledges tradition as a resource and something carried out by its adherents in a highly self-conscious manner: "A living social tradition… must engage a group of practitioners who have a sense of community based on a shared identification with a particular past (Soares, 1997, p. 14)… [tradition is a] cultural resource which patterns the responses of particular communities to contemporary challenges" (Soares, 1997, p. 16).

More recently, Shoham's review of social scientific approaches to tradition argues that the construct's explanatory power can be increased by treating tradition as "a socio-cultural practice that assigns temporal meaning" (Shoham, 2011, p. 314). In this view, whether traditions are 'authentic' or 'invented' is largely unimportant: "every tradition must have been invented at some time and by someone—whether great minds of in the Axial Age or the tourist industry of the 20th century; what is more, tradition is constantly being reinvented" (Shoham, 2011, p. 335).

Instead, custodians collectively construct traditions, ranging from annual family parties to great religions, to locate themselves through time (past, present, and future), just as the notion of place locates communities geographically or social identities distinguish between groups. By emphasizing the subjective, meaning-making aspect of tradition, Shoham (2011) argues that tradition helps researchers understand how groups and societies interpret their world, construct norms, legitimate authority, and develop collective identities. However, not all sociologists ascribe to this view. Giddens (1999), for example, maintains the view that modernity involves the erosion of tradition, defined as relatively unreflective behaviour.

In cultural sociology, following Swidler's (1986) reconceptualization of culture as a 'toolkit' providing actors repertoires of action, researchers now emphasize a tradition-as-resource perspective. In particular, researchers examine how communities establish traditions that assist the formation and transmission of collective memory (Dacin & Dacin, 2018; Armstrong & Crage, 2006; Simko, 2012; Vinitzky-Seroussi, 2002; Zerubavel, 1996). Building on Halbawchs' (1992) concept of collective memory, these studies portray participants as custodial agents who collaborate as well as contest with one another to create and maintain traditions such as commemorations (Steidl, 2013; Zerubavel, 1996).

Social movement theorists also draw on the notion of tradition, showing that activists and organizations use tradition to legitimate their actions or develop new styles (Eyerman & Jamison, 1998; DeSoucey, 2010; Rao, Monin, & Durand, 2003). Tradition also serves as a basis for developing group identity. Rao et al. (2003) find culinary traditions serving as bases for group identities among French chefs, each associated with alternate role prescriptions and styles of cooking. DeSoucey (2010) develops the concept of "gastronationalism" in food politics. Examining the politics of foie gras in the European Union, DeSoucey (2010) illustrates how

producers and French politicians linked the food to French national tradition, associating its production and consumption with an affirmation of French identity and, moreover, building support for economic protections. Other researchers such as Molotch, Freudenburg and Paulsen (2000) likewise suggest that traditions help communities transform geographic space into a distinct "place" associated with particular identities, styles, or 'character'.

     ***Tradition as resource in other disciplines***: Outside of cultural sociology, economic and institutional theorists have also started to turn their attention to tradition, mostly taking perspectives that seem to fall closer to a tradition-as-resource perspective. Biggart and Beamish's (2003) review uses the term 'convention' to describe '"shared templates for interpreting situations and planning courses of action in mutually comprehensible ways" (Biggart & Beamish, 2003, p. 444). From the economic sociology perspective, convention serves to coordinate economic activity in societies because it makes behavior predictable. According to this view, economic transactions involve not only risk (where rational decision-making is possible, as expected outcomes can be calculated), but also uncertainty (where preferences cannot be ranked or the facts are unclear). Under these circumstances, actors' decisions require some sort of justification which over time can become conventionalized—taken-for-granted and mutually perceived to be 'normal and right' (Biggart & Beamish, 2003, p. 456). When conventions form, these enable actors to predict and, to some degree, enforce each other's behavior. Thus, convention serves as a coordination mechanism in the way that markets or hierarchies coordinate behavior (Biggart & Beamish, 2003). Tradition, particularly Stinchcombe's (1965) statement on organizational tradition, also informed the growing literature on organizational imprinting and the notion that attributes an organization acquires during its founding are retained despite later environmental change (Johnson, 2007; Marquis & Tilcsik,

2013). In turn, this literature informed various subfields of management theory, including institutional theory, organizational ecology, and career management (Marquis & Tilcsik, 2013).

In literature and folklore studies, scholars focused on tradition's hermeneutic role—its ability to help individuals or communities interpret their worlds (Bruns, 1991; McDonald, 1997; Redfield, 1960). While many scholars in these areas treat tradition synonymously with culture, Redfield (1960) distinguishes the "great tradition" of a society from its "little tradition". Great tradition, according to Redfield, consists of the urban, literary, learned, elite culture, consisting of specialized bodies of knowledge such as the Western Canon. Little tradition, by contrast, involves local, rural, unwritten, and "for the most part taken for granted and not submitted to much scrutiny or considered refinement and improvement" (Redfield, quoted in Shoham, 2011, p. 330). These two traditions interact in various ways through a civilization's history, as when Romantic artists incorporated folklore and rural traditions into literature and music now considered high art.

In the philosophy of science literature, Kuhn's (1962) theory of scientific paradigms appears to align with Redfield's notion of "great traditions". Challenging the notion that scientific research involves the gradual accumulation of findings, Kuhn (1962) argued that most scientists conduct research within particular scientific traditions or "paradigms", each with its own problems and methods, and that great breakthroughs come not from the accumulation of findings in these paradigms, but the replacement of one paradigm by another (for example, Einstein's theory of relativity did not improve Newtonian physics so much as replace it).

As scholarly understanding of tradition developed, researchers from applied disciplines borrowed theories to explain phenomena of interest in management, marketing, and tourism. Tourism researchers are especially interested in the question of authenticity, the conditions under

which tourists experience traditions as authentic or "sincere" and the outcomes when they do so (Chhabra et al., 2003; Robinson & Clifford, 2012; Taylor, 2001). In marketing, scholars tend to examine tradition in the context of consumption as the basis for authenticity and nostalgia in processes of myth and place making (Belk & Costa, 1998; Beverland & Farrelly, 2009; Peñaloza, 2001; Thompson & Tian, 2007).

Management scholars have also turned their attention to tradition. The early management literature did not usually distinguish tradition from other aspects of an organization's culture, such as symbols and rituals (Chatman & O'Reilly, 2016; Trice & Beyer, 1993). We attribute this partially to a tradition-as-constraint perspective imprinted from theories drawn from seminal sociological and anthropological works. As we elaborate in the following section, management researchers' more recent work goes further to theorize tradition as a distinct construct (Dacin & Dacin, 2008; Hibbert & McQuade, 2005; Rowlinson & Hassard, 1993). While acknowledging the positive direction of this trend, we argue that the focus on how custodians use traditions strategically to accomplish organizational goals may obscure earlier insights about how traditions change these actors as well (Trice & Beyer, 1993). The fragmented nature of this literature makes it difficult for management theorists to grasp where earlier and later management research streams present compatible claims, where their claims about tradition conflict, what insights tradition brings to our understanding of organizational phenomena generally, and what questions remain. We explore these issues below.

**New Perspectives on Tradition in Management Scholarship**

Since the 1980s, a variety of streams in management scholarship incorporate emerging theories of tradition in the social sciences (Weber & Dacin, 2011). These areas of research, which either treat tradition as an explanatory construct or explore its role in organizations,

include the "second wave" of organizational culture research (New Organizational Culture

approach) (Birnholtz, Cohen, & Hoch, 2007; Howard-Grenville et al., 2013; Schultz & Hernes,

2013; Walsh & Glynn, 2008; Weber & Dacin, 2011), institutional theory (Dacin & Dacin, 2008;

Dacin et al., 2010; Lok & de Rond, 2013), critical management studies (Rosen, 1985; 1988; Di

Domenico & Phillips, 2009), field theory (Anand & Jones, 2008; Anand & Watson, 2004),

organizational history and memory (Foster et al., 2011; Hatch & Schultz, 2017; Rowlinson &

Hassard, 1993), and occasionally business ethics (Feldman, 2007), group dynamics (Fine &

Hallett, 2014; Fine & Corte, 2017), and interorganizational collaboration (Hibbert & McQuade,

2005; Hibbert & Huxham 2010). Much more than in earlier research, these studies highlight the

multiple modes in which actors engage with traditions—as organizers who establish a tradition,

as carriers who transfer it to new settings or generations, as participants who repeatedly enact it,

or as audiences who regulate it by conferring legitimacy or resources. We identify three themes

that characterize this research: traditions and custodianship, tradition as intangible assets, and

open-ended outcomes.

*Traditions and custodianship*: Institutional theorists have conceptualized traditions as

ritual practices involving an element of theatrical performance. While critical approaches also

touched on this aspect (Rosen, 1985), institutional and field studies describe more open-ended

motives among actors participating and outcomes of tradition (Anand & Watson, 2004; Dacin et

al., 2010). Importantly, these more recent efforts explicitly incorporate the notion of

custodianship or guardianship in management scholarship on tradition (Dacin & Dacin, 2008;

Dacin et al., 2010; DeJordy, 2010; Lok & de Rond, 2013). Dacin and Dacin (2008) was the first

study in management to build on Soares' (1997) notion of custodianship to examine 'traditions

as institutionalized practice' by illustrating how relatively stable and value-laden practices are actively managed by custodians vested in their continuity.

Using the case of the Aggie Bonfire at Texas A&M University, Dacin and Dacin show how following numerous challenges to its legitimacy over time, the Bonfire's custodians adapted it by altering or removing its ancillary elements, but retained the core elements that defined the tradition (Dacin & Dacin, 2008). Dacin and Dacin (2008) and a second study linking ritual performance to institutional maintenance (Dacin et al., 2010), suggest custodians manage and transmit traditions for a variety of purposes, not necessarily with an intent to change or maintain institutions. Dacin et al. (2010) and Lok and de Rond's (2013) studies of formal dining in Cambridge Colleges and the Oxbridge Boat Race, respectively, illustrate how custodians work 'behind the scenes' to maintain and transmit even the most ostensibly stable traditions. In formal and voluntary roles, custodians socialize new organizational members to a tradition, enforce adherence to its rules, and repair damage done to it through events which would otherwise undermine it (Dacin et al, 2010; Lok & de Rond, 2013).

*Tradition as intangible assets*: The concept of traditions as intangible assets managed by custodians is a prevailing theme the "second wave" organizational culture and organizational identity literatures. Much of this literature concerns traditions as symbolic constructions which organizational actors maintain, develop, and even resurrect because they give shared meaning to situations (Weick, 1995: 134). Foster et al. argue an organization's history should be seen as a strategic asset in that "narrative accounts of a firm's history may be used to… appropriate or borrow the legitimacy of related or proximate social institutions and incorporate it into its identity or brand… [which] can create a substantial and sustainable competitive advantage" (Foster et al., 2011, p. 102).

Several studies incorporate the role of custodians in organizations' and communities' ability to maintain or resurrect traditions across time. Howard-Grenville et al., (2013) introduce the notion of "identity custodians" who facilitate the creation and management of new collective identities through their first-hand experience with the prior identity. Howard-Grenville et al. (2013) propose that custodians facilitate the resurrection of past social arrangements by authenticating experiences, enrolling bystanders to identify with the tradition, and modelling behaviors necessary to restore practices to new generations of the community. Interestingly, the important function of transmission in Howard-Grenville et al. (2013) was fulfilled not by individuals in official roles pursuing strategic goals, but largely by voluntary custodians working in unofficial roles who had emotional and aesthetic investment in reviving the collective identity.

Likewise, in their study of a traditional motto's resurrection in the Carlsburg Group, Hatch and Schultz (2017) suggest that organizations use history for strategic purposes, but that much of this process is driven bottom-up from historical discoveries and given credibility by authenticity. In opposition to the critical view that suggests elites freely 'invent' traditions to dupe others, Hatch and Schultz present evidence that "manipulating history risks failure because it undermines the immediacy, intensity, and emotionality that history inspires in others and thereby denies its agency" (692).

Finally, some studies see an organization's history as something that gradually accumulates into tradition and later serves so coordinate action (Weick, 1995: 134). For instance, Walsh and Glynn (2008) theorize that past organizational identities may endure as a "legacy organizational identity", guiding future organizational sensemaking by situating the organization in time. Focusing on emergence, Birnholtz et al. (2007) propose that seasonal organizations such as summer camps each have unique "organizational characters" which are transmitted to new

cohorts of employees following periods of dormancy as routines are re-established. Feldman (2007) proposes that "moral traditions" help organizations transmit traditions through generations of employees.

As can be seen, researchers in the new wave of organizational culture research find a variety of motives in why custodians maintain and develop their traditions – some focus on relatively automatic processes (Birnholtz et al., 2017), some emphasize strategic benefit (Foster et al., 2011), and yet others see actors striving for authenticity (Hatch & Schultz, 2011, Howard-Grenville et al., 2013).

*Open-ended outcomes*: We have evidence for both traditions as something that transforms relatively passive actors who participate in them (early management tradition research) and as something relatively strategic or aesthetically-driven custodial actors manage to accomplish ends (more recent management tradition research). In highlighting the studies below, we argue how greater attention to boundary conditions—and in particular the nuanced role of custodianship—is necessary to integrate their varied conclusions. When developing our custodianship framework later in this paper, we show how the distribution of custodial roles may help predict the multiple outcomes of traditions, as well as changes to them over time.

While traditions can serve to reinforce status hierarchies as critical theorists argue, institutional and field theorists show that traditions can also serve to flatten status hierarchies and foster group identity. Dacin et al.'s (2010) research shows that ritual performances associated with traditions inculcate participants with shared identities. At the group level, Fine and colleagues' (Fine, 2009; Fine & Corte, 2017; Fine & Hallett, 2014) ethnographic analysis of the National Weather Service illustrates how group traditions serve as a basis for group bonding and self-esteem in otherwise constraining institutional environments. At the field level, Anand and

Jones (2008) and Anand and Watson (2004) show how actors establish new traditions such as award ceremonies to influence the development of new organizational fields.

Several factors account for diverse views of tradition and as mentioned earlier, we highlight these in Table 1. Most importantly, researchers examine traditions from the vantage points of different social positions without integration of how social position affects an actor's engagement with tradition. Some studies describe traditions as experienced by organizational newcomers (Dacin et al., 2010; Tracey, 2016) and subordinates for instance (Rosen, 1985; 1988), by the actors creating and maintaining them (Dacin & Dacin, 2008), or by external observers (Anand & Watson, 2004). Some actors passively participate in traditions—undergoing changes in their beliefs or social status as a result of doing so (Dacin et al., 2010); some actively establish, maintain, or change traditions (Anand & Jones, 2008); while others regulate the enactment of traditions through social evaluations or by giving or withholding resources (Dacin & Dacin, 2008). Actors with relatively little power being newly inducted into a tradition (Trice & Beyer, 1984) could hardly be expected to show the same level of active and strategic participation as, for example, powerful actors who have established a tradition from its beginning (Anand & Jones, 2008).

Differing accounts also exist for why actors are motivated to participate in tradition, which range from political to aesthetic considerations, and whether authenticity matters (Anand & Watson, 2004; Dacin et al., 2010; Tracey, 2016; Howard-Grenville et al., 2013). To understand the mutual transformations of actors and traditions in their engagement with each other, we suggest the need to integrate the different research streams which focus on different types of actors—those who are relatively powerful and relatively powerless, and those who organize or directly participate in a tradition versus those who are primarily audiences to them.

In addition to the issue of agency, prior research makes competing claims about the function of tradition in organizations. For example, while some researchers argue that traditions serve to maintain status hierarchies (Rosen, 1985; 1988), others show how traditions enable members to break out of them by generating experiences of communality and solidarity (Howard-Grenville et al., 2013; Trice & Beyer, 1984). We suggest that these studies have unexplored boundary conditions relating to the types of actors who participate in a tradition. In some traditions, especially small-scale traditions such as a group tradition (Fine & Hallett, 2014), participants know each other and fulfill multiple roles such that in many, if not most cases, each individual serves as both the organizer and audience of the tradition. With other traditions, such as formal organizational or field-level traditions (Rosen, 1985; 1988; Trice & Beyer, 1984), traditions are performed under very different conditions—the organizers and audiences may be unknown to each other or have opposing interests. We suggest that the examination of how the different social or custodial positions involved in the enactment of tradition is necessary to set the boundary conditions on questions such as whether traditions loosen or create status distinctions, whether 'invented' traditions can occur at the group level just as they may at the field or societal level, and whether traditions are maintained primarily by habit, strategic interests, or aesthetic motives.

While recent research emphasizes custodianship and tradition as part of an organization's stock of intangible resources (Feldman, 2007; Foster et al., 2011; Walsh & Glynn, 2008; Weber & Dacin, 2011), tradition sometimes becomes difficult to distinguish from other social phenomena such as routines (Eggers & Kaplan, 2013), frames (Cornelissen & Werner, 2014), and culture (Giorgi et al., 2015). Particularly, it is unclear to what extent the different perspectives across the literatures make complementary or incompatible claims about how

organizational traditions emerge, their nature, and their effects. To address these concerns, we begin by offering a definition of tradition that allows us to accomplish our goal of incorporating insights from both a 'tradition-as-constraint' and a 'tradition-as-resource' view while ensuring tradition remains a bounded and distinct construct for management researchers.

**Defining Tradition**

We propose management theorists can conceptualize tradition as *consciously transmitted beliefs and practices expressing identification with a shared past*. Such a definition, we believe, is at once precise, capturing social scientists' and humanists' insights on what makes tradition unique, and broad, remaining compatible with the multiple ways tradition is used in management scholarship at different levels of analysis. Specifically, our definition has three components: a 'conscious transmission of practices'; 'expressions of identification'; and 'shared pasts'.

'Conscious transmission' directly incorporates Eyerman and Jamison (1998) previously quoted insight that "it is the conscious articulation—the process of "naming, defining, and making coherent—which distinguishes tradition from custom or habit, which are similar in that they all deal with recurrence" (Eyerman & Jamison, 1998, p. 27). The definition excludes earlier views of tradition such as Weber (1958; 1978) and Eisenstadt (1973) as the totality of a social system's institutions, cultures, and values. This separates tradition from such broader concepts for which management researchers already have a vocabulary, concepts such as culture, institutional environments, and fields, among them.

The notion of conscious transmission also provides expectations about how traditions manifest over time. Traditions should be more durable, long-lived, easier to adopt, and attract a greater sense of custodianship than taken-for-granted habits, customs, or routines because actors engage in the former with conscious awareness (Eyerman & Jamison, 1998). As Shils notes, all

traditions—even traditions of social critique—have a "normativeness of transmission"; that is, efforts are made to pass down traditions because their adherents have conscious beliefs that they are worth passing down (Shils, 1981, p. 25). As such, a practice that is a tradition should always be associated with some deliberate mode of transmission. That is, actors vested in the tradition (i.e., custodians) are central to the notion of conscious transmission. However, any practice from the past enacted on an intermittent and spurious basis should not qualify as a tradition (Jacobs, 2007).

The notion of 'expressing identification' (Eyerman & Jamison, 1998; Soares, 1997) clarifies that traditions convey at least some symbolic meaning, excluding from the definition behaviors that fluctuate day-to-day resulting from the physical, political, or material demands placed on individual or collective actors (Shils, 1981). We do not count as traditions long-standing practices in organizations merely directed toward achieving technical goals and which would shift immediately with changes in environmental demands, such as the price a company charges for its goods and services in a stable market (Biggart & Beamish, 2003). To us, traditions are institutionalized practices (Dacin & Dacin, 2008) and, therefore, like institutions, are infused with a moral value beyond their material outcomes (Selznick, 1949).

Furthermore, expressing identification implies tradition has the potential to unite and to divide social groups (Tajfel & Turner, 1979), and is compatible with management studies which that also examine these outcomes (Anand & Watson, 2004; Rosen, 1985; 1988). Our definition also leaves room for a variety of motives and targets for the expression of identification found in empirical studies, including actors organizing, carrying, and participating in traditions primarily for their own amusement (Fine & Corte, 2017), or doing so strategically to acquire legitimacy from external audiences (Foster et al., 2011).

The notion of 'shared pasts' is a key component of our definition of tradition. Traditions give meaning to people, things, and events by placing them in temporal order and showing continuity with some past. The definition remains agnostic as to whether this past is 'imagined' or 'real', so long as there is some shared agreement about what it is and what it means. This remains consistent with Shoham's note that "every tradition must have been invented at some time and by someone—whether great minds in the Axial Age or the tourist industry of the 20$^{th}$ century" (Shoham, 2011, p. 335), while allowing that traditions vary in their stability and perceived authenticity (Dacin & Dacin, 2008; Eyerman & Jamison, 1998). Thus, our definition encompasses management researchers who portray traditions as deliberately 'invented', as the accumulation of a long history, or as something in-between (Dacin et al., 2010; Foster et al., 2011; Rowlinson & Hassard, 1993).

## CUSTODIANSHIP OF TRADITIONS

In this section, we build on our literature review and turn our attention more toward custodians of tradition by developing a custodianship framework. Acknowledging traditions as 'consciously articulated' practices suggests that actors perform various custodial activities with respect to an institutionalized practice such as tradition. Custodians are vested actors (individual or collective) who seek to maintain institutionalized practices such as traditions (Dacin & Dacin, 2008; Soares, 1997).

Several scholars (Giddens, 1994; Stinchcombe, 1965; Shils, 1981; Soares,1997) give prominence to the role of custodians in creating, preserving, and reshaping traditions. As mentioned above Stinchcombe (1965) noted the importance of understanding who carries a tradition, why it is carried as well as understanding whose interests are vested and how this occurs. Shils' (1981) portrayal of custodians is of active agents adapting tradition to achieve

their goals.  Soares (1997) suggests that traditions are resource warehouses presenting strategic

opportunity for custodians. Giddens suggests that the integrity of a tradition derives not from

persistence across time but rather from the "continuous work of interpretation" that captures the

connections of the present and the past (Giddens, 1994, p. 64). Giddens (1994) further suggests

that the authority for this interpretive work is held by 'guardians' who are both emotionally

vested agents and mediators.

In our review, we make the case that traditions need to be considered distinct from other

practices found in organizations such as habits, customs, or routines based on the criteria of

'conscious articulation' (Eyerman & Jamison, 1998) and the presence of custodianship (Dacin &

Dacin, 2008; Soares, 1997). Furthermore, our review of the traditions literature leads us to

suggest that there are four custodial roles associated with any tradition, these are organizer,

carrier, performing audience, and regulative audience. Two of these roles are audiences while

two are explicitly curatorial.

Each of these roles is custodial in nature in that it gives actors a stake in a particular

tradition and the power or authority to influence it (Dacin & Dacin, 2008; Giddens, 1994; Shils,

1981; Soares, 1997). Through the identification of four custodial roles—organizers, carriers,

performing audiences, and regulative audiences—our framework captures perspectives of prior

theory, accounting for the unique aspects of a tradition that become salient to those participating

from various vantage points.

It is important to acknowledge, at this point, that in some traditions, the four custodial

roles are fulfilled by the same group of actors, while in other traditions the roles are distributed

across actors and groups with different perspectives, interests, and resources. This distinction

likely becomes more apparent if one considers levels of analysis.  As we highlight in our

discussion, custodianship of traditions at a small group level is likely to be concentrated, shared and/or fulfilled by the same set of actors whereas custodianship of traditions at an organizational or societal level is likely to be more distributed.  By developing this custodianship framework, we will then be able to explore, in some depth, the distributed nature of custodians, which, in turn, will provide an understanding of the varied nature and scope of traditions more generally.

While previous research includes descriptions of various custodian roles, it typically examines these roles in isolation. In contrast, our framework can be used to highlight how the distributed nature of custodial roles vary. The notion of distributed custodianship provides new perspectives by integrating findings in the tradition literature, setting boundary conditions for prior theory, and revealing implications. We do this by illustrating how unity (whether the different custodial roles are assumed by the same actor) or distribution (whether the different custodial roles are assumed by different actors) helps or hinders the activities of those playing each custodial role and provide insight on when certain traditions are likely to maintain status distinctions, generate stability, and transform participants. Our framework also illustrates when traditions have the potential for stability, change, conflict, trade-offs, and when multiple versions of a tradition may exist over time.

**A Custodianship Framework**

Based on our literature review, we identify two broader current characterizations of tradition scholarship: 1) research primarily characterizing principle actors as passive participants of relatively static traditions who become transformed by their experiences (tradition-as-constraint) and 2) research primarily characterizing principle actors more or less as active custodians of tradition, strategically managing traditions over time (tradition as resource). In this section we propose a custodian framework capturing these perspectives. As we illustrate below,

without the integration of these two streams of scholarship, management scholars' understanding

of tradition will be partial and fragmented because neither alone offers an adequate explanation

of both how actors change traditions and how traditions change actors over time.

Table 2 provides an overview of our custodianship framework, associating each of the

four custodial roles with various unique aspects of that role. Our review of the literature

suggested a number of issues important for management scholars that were highlighted by earlier

research (Anand & Watson, 2004; Dacin et al., 2010). These aspects focus on an actor's

engagement with the tradition, their primary phenomena of interest with respect to the tradition,

whether the role entails personal changes or changes of status for the actor, and what powers the

role grants the actor over the tradition. Our framework also identifies which of the theoretical

approaches discussed in our literature review are most closely associated with each custodial

role. In doing so, the framework captures perspectives of prior theory, accounting for the unique

aspects of a tradition that become salient to those participating from various vantage points. The

following discussion focuses on each of the custodial-roles identified in the framework and

elaborates on their various aspects and theoretical underpinnings.

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Insert Table 2 Here

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*Organizer*: We assign the custodial role of *organizer* to individuals or collective actors

who are engaged in establishing the tradition or who, thorough their actions, actively add,

modify or remove elements of a tradition. This role of organizer draws its basis from across a

variety of the theoretical approaches discussed in the literature review including Institutional

Theory, Field Theory and Critical Management Theory. For example, in our literature review we

highlight the work of Hobsbawm (1983) that points to the role of elites in inventing tradition while critical scholars suggest traditions preserve status hierarchies (Rosen, 1985; 1988).

The primary phenomena of interest associated with the custodial role of organizer is the maintenance of the tradition itself as well as the macro level consequences of the tradition such as the preservation of organizational identity (Greenwood, Raynard, Kodeih, Micelotta & Lounsbury, 2011) or the preservation of the organizer's power (Dacin & Dacin, 2008; Hobsbawm, 1983). Through the engagement with a tradition, the custodial role of organizer grants the actor power over organizing the material and performative aspects of the tradition as well as power over the selection of the performing audience. This is important because organizers play the lead role in establishing the tradition through stage setting and/or frame building. While participation in a tradition as an organizer does not necessarily entail personal changes, it may involve a change in the actor's social status, such as a change in prestige.

*Carrier*: The *carrier* custodial role is one in which the actor actively engages in bringing tangible and intangible elements of traditions into new temporal and spatial contexts. For example, carriers work to diffuse the tradition trans-temporally as well as across geographic boundaries. As such, the carrier may also be involved in adding, modifying or removing elements of a tradition. For example, in their study of Scottish advocates, Siebert, Wilson and Hamilton (2017) examine how institutional practices are often unquestioningly produced and reproduced across time and spaces. They focus on the awe and enchantment of newcomers as they willingly accept the rules and constraints of spaces. The two most relevant theoretical approaches associated with this custodial role are those of Institutional Theory and the New Organizational Culture Research. In these theoretical approaches several authors examine how traditions are transmitted, modified, carried and maintained across generations (Birnholtz et al.,

2007; Dacin & Dacin, 2008; Howard-Grenville et al., 2013; Dacin et al., 2010; Lok & de Rond, 2013).

In light of the above, while participation in the tradition in the custodial role as a carrier does not involve personal change nor change of status, the primary phenomenon of interest for the carrier is clearly the tradition itself. The power that this custodial role grants the carrier over the tradition is one of selective carrying of ideas to organize traditions.

***Performing Audience***: The *performing audience* is another critical custodial role as these are the individuals who participate in the enactment of the tradition. Their primary phenomena of interest are more related to micro-level outcomes of the tradition such as the personal experiences they experience through their participation. Through their participation, their role grants them limited power over the tradition, but it is still an important power to affect the performative outcomes they experience through their participation. More so than in other custodial roles, through their participation, the performing audience may experience both personal changes as well as changes to their social status. Several theoretical approaches form a relevant basis for the custodial role of performing audience including Early Organizational Culture research and Critical Management Theory. Some of the literature described above points to the identity and role transformation of audience members as they participate in a tradition. In their study of high table dining at Cambridge, Dacin et al. (2010) show how mastery of tradition and the practices associated with dining rituals reinforces roles and identity both while at Cambridge and beyond while Di Domenico and Philips (2009) similarly demonstrate the power of elites to communicate their privilege through performing tradition.

***Regulative Audience***: The *regulative audience* engages with the tradition in a number of ways. Through their engagement they provide a social evaluation of desirability or

appropriateness of a tradition or its specific enactment. They also engage with the tradition by providing much needed legitimacy and resources—tangible and intangible elements—for the enactment of a tradition. A third way in which the regulative audience engages with the tradition is by regulating the participation of other actors in the tradition by creating and enforcing the rules and normative boundaries of its practice.

As in the carriers, the regulative audience's primary phenomenon of interest is the tradition itself. Through this focus, the role of the regulative audience grants them power over the tradition to affect the performative outcomes, such as the extent of prestige associated with the tradition, as well as to facilitate or hinder the continuation of the tradition.

Both Institutional Theory and Field Theory are relevant theoretical approaches that underlie the custodial-role of regulative audience. For example, the research reviewed above by Siebert et al (2017) and the work of Anand and colleagues (Anand & Jones, 2008; Anand & Watson, 2004) all point to the regulative aspects of custodial roles.

**Applying the Custodianship Framework**

In this section we continue to build our custodianship framework by exploring how the different permutations in the distribution of custodial roles either act as boundary conditions for existing approaches to tradition or highlight new research questions with important implications and avenues for future research. We do this by connecting tradition to broader discussions in management and organizational scholarship and point to unresolved questions, answers to which would provide significant contributions to the understanding of tradition and organization. These questions relate to how traditions can both reinforce status orders and erase them, how traditions with diverse audiences serve their performative functions and develop over time, and the nature, motivations, and influence of carrier groups. We also note research avenues attending to the role

of tradition and inform discussions about other organizational phenomena, including institutions (Dacin & Dacin, 2008), identities (Howard-Grenville et al., 2013), practices (Lok & de Rond, 2013), and social boundaries (Tilly, 2004). Finally, we illustrate how conscious articulation can inform the process of institutionalization and identity formation, the implications for adoption and diffusion of practices that become traditions, emergence of custodial roles in organizations, and how traditions can create or weaken intergenerational boundaries in organizations.

For the sake of simplicity and clarity, we limit our focus to examining the implications of the interaction between two custodial groups with either unity (different custodial roles assumed by the same actor) or distribution (different custodial roles assumed by different actors) serving as the basis for change, persistence, or efficacy of a given tradition. Our logic for focusing on unity and distribution is as follows. First, unity among custodial roles gives actors in those roles more opportunity to manage the tradition, and therefore more power over other groups. Second, unity among custodial roles allows traditions to be enacted in an environment with shared beliefs and expectations, leading them to be more efficacious (which may be perceived as more effective at imparting beliefs, creating social transformations, or be experienced as emotionally resonant, depending on the perspective). Third, unity among custodial roles is likely to reduce changes in the tradition over time or across new contexts because beliefs, expectations, and interests will be consistent across place and time. Conversely, we expect that distribution increases the likelihood that a tradition will incorporate the interests and expectations of dissimilar actors, weakening its efficacy and increasing its variation across time and with diffusion. Consequently, because each custodial role is associated with unique powers and opportunities for engagement, unity and distribution can give some indication of how those opportunities will be used.

To guide our discussion, Table 3 provides an overview of how both unity and distribution help or hinder the activities of those playing each custodial role and provide insight on when certain traditions are likely to maintain status distinctions, generate stability, and transform participants, as well as the potential for stability, change, conflict, trade-offs, and multiple versions of a tradition over time. Each row of the Table relates to a specific custodial role. For example, the first row relates to the custodial role of organizer. Each column then relates to the potential interactions either with others within that role or with others in another role. The Table reflects possible outcomes of the given interaction with respect to both conditions of unity and distribution.

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Insert Table 3 Here

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As mentioned, we describe a tradition as relatively *unified* when its different custodial roles are assumed by the same actors—either the same person or actors in a structurally equivalent position (i.e., from a similar social class, organizational rank, or cohort). For instance, in a family celebrating Thanksgiving, every member may be involved in preparing the meal, participating in the meal, and evaluating whether the meal was enjoyable enough to celebrate again next year.

We describe a tradition as relatively *distributed* when the different custodial roles of a tradition are assumed by different actors—particularly those in structurally inequivalent roles (i.e., of dissimilar social class, organizational rank, or cohort). For instance, "frosh weeks" at many universities are organized by upper-year students, participated in by incoming students,

and regulated by a variety of additional actors, including university administrators, alumni, and local law enforcement.

By analyzing the unity and distribution of custodial roles, our custodianship framework proposes that researchers can place boundary conditions on competing claims in the literature about what traditions do and how they are established, changed, and diffused. Using Table 3 as a guide, we discuss how attention to unity and distribution between each pair of roles—organizer, carrier, performing audience, and regulative audience—bring new insights and suggest new research questions. Though not all possible permutations are covered, we believe this discussion provides a basis for integrating and revitalizing management scholars' understanding of tradition.

*Unity and distribution among organizers*: The first custodial role we identify is the organizer, an actor who establishes a tradition, and who adds, modifies, or removes elements of an existing tradition. The organizer creates the context in which the tradition will be performed, and can guide its course by providing supplies and selecting the performing audience. A primary question to ask is whether the organizers themselves are unified? We propose that when traditions are organized by a unified group, we can expect a tradition stabilized across time by the shared worldviews and pooled resources of the organizers. In the case of the Aggie Bonfire for instance, a tight knit Corps of Cadets was responsible for organizing the tradition—acquiring the materials, recruiting participants, and negotiating with regulatory audiences (Dacin & Dacin, 2008). With shared agreement about the tradition within the Corps, the Bonfire continued for many years with little change until challenged by external actors.

On the other hand, the development of the foie gras food tradition in France involved distributed organizers, including the small-scale producers, French legislators, and local chambers of commerce, all of who have somewhat different interests, capabilities, and

worldviews (DeSoucey, 2010). Such traditions have potential to lead to more complex outcomes (Simko, 2012). Importantly, there is a potential for conflict if organizers' interests are not sufficiently aligned. Therefore, we expect traditions to change with shifts in the relative power of each organizer involved. For example, Steidl (2013) shows how the memorial of the 1970 Kent State shooting changed to incorporate different narratives over time through a process of negotiation between constituencies. Alternatively, we suggest that a stable balance of power among organizers will make it difficult for any one party to change the tradition, causing the tradition to be highly stable as long as the balance remains. In sum, we propose that traditions are likely to be more resistant to change over time when either a) organizers are unified or b) the relative power of distributed organizers remains unchanged.

*Unity and distribution between organizers and carriers*: Next, organizers may share unity or distribution with carriers. Unity with carriers, we argue, stabilizes traditions and encourages their efficacy because of shared worldviews. Distribution with carriers however, makes traditions more likely to mutate across time and discourages their efficacy in imparting beliefs, creating social transformations, or achieving emotional resonance. In Howard-Grenville et al. (2013), long-time locals evaluated organizers' attempts to resurrect the "Track Town" identity by comparing it to their memories of the original identity. When these locals felt that organizers recaptured the original identity of Track Town, they became enthusiastic custodians who ensured other audiences that the resurrected identity was 'authentic'. On the other hand, when locals disagreed with organizers about how the identity was being resurrected, they expressed criticism about the show being put on by the organizers.

We follow performance theory in suggesting that unified performances are more likely to achieve efficacy—that is, the performance of the tradition is more likely to generate emotional

resonance, 'fusion', or feelings such as awe in performing and regulative audiences because it is uninterrupted by counter-narratives or criticisms that put its authenticity, sincerity, or importance in doubt (Alexander, 2004; Dacin et al., 2010; Goffman, 1959; Tracey, 2016). If the tradition is indeed organized to reinforce hierarchies by symbolically communicating top managers' power (Rosen, 1985), then it should help if carriers maintain this outward impression rather than undermine it.

Next, we suggest that change in a tradition over time is more likely when organizers are divided by carriers as a result of factors such as social class, organizational rank, or cohort because this makes the carriers likely to reject, replace, or add features of the tradition as they transfer it to new contexts. Carriers may change the tradition because their interests, values, and worldviews differ from the organizers. For instance, paradigm shifts in fields such as science (Kuhn, 1962), cuisine (Rao et al., 2003) and art (Wolfe, 1975) often occur as younger cohorts seeking intellectual fame or autonomy replace retiring members of the previous generation who are intellectually, emotionally, or financially committed to older paradigms. In sum, we propose that unity between organizers and carriers is likely to increase the efficacy of the tradition and that distribution between organizers and carriers is likely to increase change in the tradition as it spreads to next contexts.

We also suggest that when organizers are unified with performing audiences it encourages use of traditions for generating solidarity, including development of collective identity (Fine, 2009; Collins, 2004). On the other hand, distribution between organizers and performing audiences creates opportunities for the tradition to be used to maintain status hierarchies (Hobsbawm, 1983). When the people organizing the tradition are also participating in it, it is logically unlikely that the tradition is being used as a tool of domination. Performing

audiences will have access to the "back stage" (Goffman, 1959) and therefore it seems difficult, for example, for them to be truly be awed into thinking an 'invented' tradition is older than it is (Hobsbawm & Ranger, 1983). On the other hand, scholars with a critical perspective show that traditions can be used to maintain status hierarchies—but the boundary condition seems to be that the organizers already come from a different social class (Hobsbawm, 1983) or organizational rank (Rosen, 1985; 1988) than the performing audiences.

In sum, unity between organizers and performing audiences suggests that the tradition will reduce status hierarchies and increase collective identity of custodial groups involved. In turn, distribution between organizers and performing audiences suggests that the tradition will increase status hierarchies and reduce collective identity of custodial groups involved. We suggest future research should also consider the possibility that some traditions may both create and reduce status hierarchies at the same time.

*Unity and distribution between organizers and regulative audiences*: The final group organizers may or may not be unified with is the regulative audience. Following performance theory, we argue that unity with regulative audiences will increase organizers' ability to control traditions, thereby increasing their efficacy (Alexander, 2004; Goffman, 1959). When organizers are also the ones providing social evaluations of the tradition, and when they maintain regulatory power over who participates, they are freer to orient the tradition to maximizing emotional resonance. Formal dining at Cambridge colleges for instance (Dacin et al., 2010), occurs in a largely isolated environment where organizers can control who participates, the setting, and the flow of events without outside interference. Alternatively, distribution of organizers and regulative audiences weakens organizers' ability to control traditions. The Corps of Cadets for instance, had to make numerous changes to the Aggie Bonfire tradition in order to achieve

demands of external regulators (such that the tradition would align with safety or environmental standards, diversity, and the university's changing goals). Some of these changes were at odds with the organizers' intentions to keep a homogenous group of participants and build the largest Bonfire possible, conceivably with the aim of creating a bonding experience (Dacin & Dacin, 2008).

We, thus, propose that unity between organizers and regulative audiences increases organizers' control as well as the traditions' efficacy while distribution between organizers and regulative audiences reduces organizers' control and allows external interests to shape features of the tradition. Future research may examine how organizers balance the conflict between a tradition's internal organizational function and their acceptability to regulative audiences. For instance, some organizers see hazing rituals in university frosh weeks or scut work in medical residency programs as essential for creating cohesive bonds among recruits, yet these activities are seen as scandalous by outside audiences (Pratt, Rockmann, & Kaufmann, 2006; Kellogg, 2011). One response is that organizers may comply with institutional demands are remove the most offensive practices. Alternatively, organizers of a tradition may decouple, for instance by making hazing activities less visible to regulative audiences (Kellogg, 2011).

*Unity and distribution among carriers*: We now discuss unity and distribution regarding the second custodial role, the carrier. Carrier groups play an essential role in transmitting traditions across time and contexts, with their memories and first-hand experiences selectively maintaining or editing traditions (Birnholtz et al., 2007; Simko, 2012). We propose that unity among carriers is likely to lead to fewer variations in the transmission of a tradition across generations or during diffusion into new contexts. We suggest this is the case because a unified group of carriers is likely to have similar memories, worldviews, and interests. Simko's (2012)

analysis of 9/11 commemorations, for example, shows how the theme of memorial services varies with what memories are salient for the speakers selected. Likewise, Howard-Grenville et al.'s (2013) study of Track Town highlights how identity custodians with consistent memories allowed organizers to succeed in resurrecting a collective identity because expectations about it were consistent. Conversely, distribution among carrier groups may encourage traditions to change with each enactment or when they diffuse across settings; as Simko (2012) highlights, themes across 9/11 commemorations changed with carrier groups, each of which had different experiences and connections with the September 11 attacks. Based on this, we propose that distribution among carriers makes it more likely that a) a tradition will change across time b) multiple versions of a tradition will emerge with diffusion across contexts.

*Unity and distribution between carriers and performing audiences*: Carriers may be unified or distributed with performing audiences. When carriers are unified with performing audiences, it means the same group (or a structurally equivalent group) who supplies tangible and intangible elements to the tradition is also the one who enacts it. Under such circumstances, we suggest carriers will be more focused on enacting traditions that preserves aesthetic elements, i.e., those which generate emotional resonance, or what appears to them as "authentic" (Alexander, 2004; Howard-Grenville et al., 2013).

When carriers are distributed from performing audiences, the context changes. First, it means that carriers know more about the tradition than performing audiences, allowing carriers to maintain a "back stage" or edit the tradition more freely (Goffman, 1959). Second, it means that performing audiences' expectations about the tradition can differ from carriers', occasionally creating incentives for carriers to provide a performance that meets these expectations, even if it is not historically accurate. In the heritage tourism industry for instance, locals sometimes

present their traditions in modified format to appeal to tourists' expectations to see something quaint or exotic (Chhabra et al., 2003).

In light of the previous discussion, we propose that unity among carriers and performing audiences will encourage carriers to preserve the aesthetic elements of a tradition while distribution will encourage carriers to edit the tradition according to performing audiences' expectations. Because carriers know more than performing audiences in the second case, we also suggest it is more possible for the tradition to be used to advance interests of organizers and carriers that conflict with performing audiences, whether it is to awe audiences and maintain status hierarchies (Hobsbawm, 1983; Rosen, 1985) or simply to make profit through enjoyed performances (Chhabra et al., 2003). We believe this is an area of investigation for future research as we know relatively little about how carriers transmit traditions in the presence of audiences with prior exposure to the tradition versus those without, and how carriers' balance motives for authenticity with meeting external audiences' expectations.

***Unity and distribution between carriers and regulative audiences***: Carrier groups may also be unified or distributed with regulative audiences. When carriers are separated by regulative audiences, we suggest regulative audiences can act as a constraint on carriers' ability to modify elements of the tradition. The production of foie gras in France, for instance, must meet the standards set by numerous regulative audiences such as legislators; carriers cannot simply introduce variations in how foie gras is produced (DeSoucey, 2010). Alternatively, conflicts between carriers and regulative audiences may put pressure on the former group to deviate from perceived authenticity. After the Aggie Bonfire tradition was eliminated for instance, coalitions such as the 'Bonfire Coalition' and 'Keep the Fire Burning' attempted to resurrect the tradition but were denied resources such as use of Texas A&M University's campus

(Dacin & Dacin, 2008). The risk is that that when regulative audiences' interests or expectations change, they may be less likely to approve of core or ancillary elements of a tradition preserved by carriers. Therefore, we propose that when carriers and regulative audiences are unified, management of the tradition will be more likely to focus on perceived authenticity; when carriers and regulative audiences are distributed, elements of the tradition will emerge from tensions or negotiations between the two groups.

*Unity and distribution among the performing audiences*: As noted, the performing audience participates in the enactment of the tradition itself, and the presence of a performing audience is essential for any tradition to be considered 'living' (Jacobs, 2007; Soares, 1997). Unity among performing audiences means there is more likely to be consistency among the worldviews of actors, including their collective memories, values, and expectations (Simko, 2012). Distributed performing audiences on the other hand, will likely show variance in how they perform a tradition or react to the cultural content or social transformations imposed on them through the tradition. Simko (2012) argues that commemorations directed toward audiences with more heterogenous experiences are likely to require more open-ended, multivocal narratives than those which draw on strongly shared assumptions. Because traditions with unified performing audiences can rely on more shared assumptions (Simko, 2012), and because their shared collective memories are likely to generate a sense of emotional resonance (Howard-Grenville et al., 2013; Tracey, 2016), we propose that unity among performing audiences is likely to increase a tradition's sustainability and efficacy.

On the other hand, distribution among performing audiences may create tensions that pressure organizers and carriers to adapt the tradition to multiple collective memories, values, and expectations (Simko, 2012); therefore, we propose the distribution among performing

audiences is likely to increase the change of a tradition with time. Because traditions are handed down across generations, an interesting question is how changes in the tradition over time create variance across cohorts. Older physicians for instance, sometimes express nostalgia for the arduous socialization rituals which they experienced during their medical training (Kellogg, 2011). Kellogg's research (2009; 2011) suggests such experiences became a source of solidarity and pride among older physicians during institutional changes which reduced the severity of medical training experiences among newer physicians. Thus, we propose future research should look into how changing traditions may create social boundaries between generations of professionals in a field or cohorts in an organization.

*Unity and distribution between performing audiences and regulative audiences*: Performing audiences may be unified or distributed with regulative audiences. When the two groups are unified, it means those performing the tradition are also the ones conferring social legitimacy and possibly resources to it. In turn, this means that performing audiences will have some power over the organizers and carriers in how to enact the tradition. If the tradition no longer meets the expectations of the performing audience, whether because the tradition does not seem to serve their interests or because it does not seem "fun" (Fine & Corte, 2017), they may withdraw support.

When performing and regulative audiences are distinct groups, performing audiences may be compelled to participate with limited power. Artists, for example, may participate in tournament rituals in order to advance their careers, even if they disagree with the award selection criteria or how their output is categorized (Anand & Jones, 2008; Anand & Watson, 2004). Moreover, regulative audiences' expectations for the tradition may differ from the performing audience, leaving organizers to balance their own interests with both the performing

and regulative audiences. As with the case of Bonfire (Dacin & Dacin, 2008), attempts to balance multiple external demands may detrimentally affect the organizers' intentions for the tradition (e.g., as a socialization mechanism) and performing audiences' interests in participating (e.g., aesthetic considerations).

In sum, we expect unity among performing audiences and regulative audiences to increase performing audiences' power over organizers in how the tradition is organized as well as to emphasize performing audiences' interests in the traditions' enactment (e.g., the aesthetic element of traditions making them "fun"). Conversely, distribution is likely to both decrease performing audiences' power over organizers and to result in traditions that attempt to satisfy the demands of more audiences, harming its efficacy.

***Unity and distribution among the regulative audiences***: Regulative audiences provide social evaluations about the desirability or appropriateness of a tradition (or its specific enactment). Besides their role as a critic, regulators can affect the continuity or performance of a tradition by choosing to provide or withhold resources necessary for the enactment of a tradition, such as symbols or venues, and regulate the participation of other actors in a tradition. Following performance theory, we expect unity among regulative audiences to provide consistent evaluations of a tradition—either wholly positive or negative—because all critics share similar worldviews and interests (Alexander, 2004). The greater the distribution of regulative audiences, the more we expect multiple evaluations of a performance that disagree with one another (Simko 2012; Steidl, 2013).

The above leads us to avenues for future research for management scholars of tradition. First, how do traditions retain their efficacy under the regulation of diverse audiences? Traditions often attain their efficacy by drawing from a stock of symbolic associations, but attaining desired

meanings appears difficult with diverse audiences (Foster et al., 2011; Howard-Grenville et al., 2013). The Canadian fast food chain *Tim Hortons*, for instance, associates itself with symbols rooted in the Canadian collective memory, such as hockey. Foster et al. note the challenges the company has faced in making this connection meaningful for its increasingly diverse customers: "While the link to hockey is evidence to an older generation, younger generations and new Canadians are largely unaware of Tim Hortons founding by a professional hockey player" (Foster et al., 2011, p. 110).

Second, we ask, does it make a difference whether regulative audiences are concerned with the same or different aspects of the tradition? For instance, the Aggie Bonfire faced pressures from external groups to become more inclusive and to meet environmental standards. Since these demands do not concern the same aspects of the tradition (practices versus selection of performing audience), it is likely both will be incorporated in the tradition when the pressures become strong enough (Dacin & Dacin, 2008). On the other hand, diverse regulative audiences may place competing demands on a tradition. Within musical or religious traditions, for instance, practitioners are caught between traditionalist critics who dismiss practices that deviates from the roots of the tradition and modernizers who see creativity and innovation as necessary for the tradition's continuity (Eyerman & Jamison, 1998). It is unlikely that any configuration of the tradition's more peripheral elements will satisfy all regulative audiences' expectations and therefore other outcome may arise, such as traditions which split and come to be practiced by different groups. Church-sect theory in religious studies predicts just this sort of behavior: organized faiths tend to become institutionalized, formal, and dogmatic churches, leading some members to feel the church no longer meets their spiritual needs and who break off to form a

sect, which in turn becomes more institutionalized over time, continuing the cycle (Tracey, 2012).

## DISCUSSION

The study of tradition has become increasingly important in management research explaining phenomena as diverse as socialization, identity, institutional maintenance, and field-level change. While recent studies bring new insights, management scholars' conceptualizations of tradition suffer from a lack of theoretical integration. In direct response to Giorgi et al.'s (2015) call to advance research on organizational culture by reconciling competing perspectives, accounting for overlaps, and identifying areas of integration, we offer a custodianship framework that provides an integrated theoretical basis through which researchers can develop a more thorough understanding of organizational traditions, what is known about them, and identify opportunities for future research.

We bring together decades of research from diverse areas of anthropology, geography, history, sociology, and organizational studies. By comparing and contrasting the major themes as they appear in management scholarship we provide a starting point for researchers interested in the study of tradition to orient themselves in the literature. Moreover, we highlight a gap separating two halves of tradition scholarship: one half containing research that characterized actors as relatively passive participants transformed by tradition, what we called tradition-as-constraint, and the other half containing research that characterized actors as relatively agentic, active participants who manage traditions over time, what we called tradition-as-resource. Without integration of these halves, we suggest management scholars' understanding of tradition

will be partial and fragmented because neither alone accounts for the mutual transformation of actors and traditions in their interaction over time.

We make the case that traditions need to be considered distinct from other practices found in organizations such as habits, customs, or routines based on the criteria of 'conscious articulation' (Eyerman & Jamison, 1998) and the presence of custodianship (Dacin & Dacin, 2008; Soares, 1997). In our integrative framework on the custodianship of traditions we identify four custodial roles—organizers, carriers, performing audiences, and regulative audiences. In proposing these roles, we capture various perspectives of prior theory, accounting for the unique aspects of a tradition that become salient to those participating from various vantage points. Moreover, we introduce the notion of distributed custodianship that provides new perspective by integrating findings in the tradition literature, setting boundary conditions for prior theory, and revealing implications for both theory and practice. We show how unity and distribution help or hinder the activities of those adopting each custodial role and provide insight on when certain traditions are likely to maintain status distinctions, generate stability, and transform participants, as well as the potential for stability, change, conflict, trade-offs, and multiple versions of a tradition over time.

We also integrate studies of tradition that span vastly different scale with respect to levels of analysis. As a result of this coverage, our custodianship framework identifies a similarity across traditions ranging from small group traditions in meteorological offices (Fine & Corte, 2017) to organizational-, field- and societal-level traditions such as professional rites of passage and award ceremonies (Anand & Watson, 2004; Kellogg, 2011): that each has a set of custodians who can be more or less distributed. While further research is needed on this phenomenon, we do expect traditions to have a more distributed set of custodians at higher levels of analysis,

particularly at the field and societal levels. Larger-scale traditions like professional socialization programs draw in diverse regulative audiences such as administrators, accreditors, and politicians (Kellogg, 2011) that small group traditions often lack.

We also expect that a tradition will accumulate a more distributed set of custodians if it diffuses over time (either across generations or settings), since this provides opportunities for actors from different social positions to participate. For instance, the Texas A&M Bonfire attracted the attention of audiences who had little involvement in its performance over the years (Dacin & Dacin, 2008). A second example of this are long-time locals becoming a carrier group who could support or deny organizers' claims to authenticity as they resurrected Track Town (Howard-Grenville et al., 2013).

Finally, our review guides future scholarship on tradition by highlighting important questions about traditions and its custodianship specifically, while also connecting tradition to broader discussions in management and organizational scholarship. We point to unresolved questions, answers to which would provide significant contributions to the understanding of tradition and organization: how traditions can both reinforce status orders and erase them, how traditions with diverse audiences serve their performative functions and develop over time, and the nature, motivations, and influence of various custodial roles. We also note research avenues attending to the role of tradition and inform discussions about other organizational phenomena, including institutions (Dacin & Dacin, 2008), identities (Howard-Grenville et al., 2013), practices (Lok & de Rond, 2013), and social boundaries (Tilly, 2004). We illustrate how conscious articulation and transmission can inform the process of institutionalization and identity formation, the implications for adoption and diffusion of practices that become traditions,

emergence of custodial roles in organizations, and how traditions can create or weaken intergenerational boundaries in organizations.

We believe that there are many important questions about how traditions emerge, change, and dissipate over time, as well as questions about what gives efficacy to traditions and that valuable insights can be derived through our custodianship framework that enables researchers to consider how different groups create, shape and experience traditions in different ways depending on both their context and their social position.

**Future Research Questions**

Along with the various questions raised throughout our review and discussion, several additional opportunities emerge for future inquiry. First, future research needs to focus on a number of critical issues of traditions and their custodianship. To begin, what factors lead to the fragility versus resilience of a tradition? In their study of the Aggie Bonfire, Dacin and Dacin (2008) show that traditions can have humble and serendipitous beginnings. Are traditions more fragile in their early moments or once in place, do they become outdated and vulnerable if they fail to adapt? In our review we suggest that traditions change and adapt over time. Invariant traditions such as strict rules can be challenged and oral traditions are often forgotten despite being held in collective memory. However, as Siebert et al (2017) show, even the strictest rules go unquestioned as they are inured with enchantment of the past.

Relatedly, Giddens (1994) suggests that tradition, as it is linked to the past, has a strong weight on the present but in doing so pulls the future back to be reconstructed and reconnected with the past. This underscores the trans-temporal nature of tradition and the nonrecursive relationship between traditions and time. Consequently, the temporal nature of the influence of tradition, including its impact on the activities undertaken and meanings attributed in the past,

the present as well as the future, should be an important part of any research stream examining

traditions. That is, the interactions described in our custodianship framework suggest the

necessity for a deeper understanding of how these interactions influence the

construction/reconstruction of past, present and future traditions.

Yet another related question is what determines the portability of traditions? As Giddens

notes, "Tradition is always in some sense rooted in contexts of origin or central places"

(Giddens, 1994, p. 80). Are some traditions more or less sticky across time, ideology and

geographic contexts? If tradition is the end result of a unique set of political, economic, social

and cultural conditions, to what extent and how do certain traditions diffuse more or less readily?

As such, do they carry greater weight and more or less affordance for change and modification?

It would be interesting to examine the permeability of a tradition's boundaries as well as

processes of translation across contexts or across those who may be considered "outside" as

opposed to "inside" any given boundary or place (Giddens, 1994). We suggest the need to

consider the "plasticity" of traditions and the extent to which they shift (Giddens, 1994; Lok &

De Rond; 2013). A growing body of work on translation may provide some important insights

here (Czarniawska & Joerges, 1996; Zilber, 2008). These authors describe efforts undertaken to

"translate" practices and meanings into local contexts. In doing so, traditions and other micro-

institutions are transformed and made congruent through processes of active sense-making and

sense-giving. A focus on translation importantly privileges the need to more deeply consider

issues of embeddedness and custodianship. How do boundaries of place influence custodial

work?

We suggest the need for more explicit attention to the embeddedness of traditions as

rooted in spaces and place. While place and space have long been a focus of organizations and

geography scholars (e.g. Bucher & Langley, 2016; Elsbach, 2004; Elsbach & Pratt, 2007; Tuan, 1974) more recent work has begun to explicitly examine the linkage between traditions and place (Dacin & Dacin, 2018; Dacin et al, 2010; Siebert et al, 2017). The very rootedness of traditions in place links to the importance of understanding the diversity and distributed nature of custodianship. Custodians curate traditions and in doing so, often maintain and make places. In turn, the raw material for inventing and changing tradition arises from place. If traditions can be conceived as institutionalized practices or micro-institutions then it is imperative to consider the broader connection to more macro-institutions such as place.

All of the questions and issues we raise may be important but, in the end, they also point to the critical importance of understanding tradition and, in particular, the role of custodianship to a far greater extent. In underscoring the importance of understanding the role of social actors, Stinchcombe (1965:167) makes the point about the need to understand who carries a tradition over time and why. Soares (1997) reinforces this notion, stating that whether an invented tradition unites social groups, or whether it enables a group to acquire a distinct identity, depends upon who creates, controls, and offers custodianship of the tradition. For example, oral musical traditions such as songs and anthems associated with social movements served as a source of unity in the case of the Civil Rights movement in the 1960s. As such, social movements become a powerful context where traditions can become "actualized, reinvented and revitalized" as a result of the degree of congruence between a tradition and the movement (Eyerman & Jamison, 1998). Custodians work to bring about and renew this congruence over time. Given the increasing use of social media in social movements, it would be interesting to examine the extent to which the diffusion of traditions can be more rapid and immediate and to what extent this impacts audiences? For example, we know that traditions must pass across generations and as

such are susceptible to change and adaptation as they reach the hands of new custodians. How would the more immediate transmission of a tradition impact who can now potentially play the role of custodian?

In sum, the concept of tradition imparts on management scholars a greater appreciation for "pastness", counterbalancing the field's vulnerability to fads and fashions (Abrahamson & Fairchild, 1999). As in industry, management scholarship's attitudes to tradition and modernity appear closest to those held by sociologists 100 years ago, if not enlightenment thinkers long before them associating the "old" with irrationality and superstition and the "new" with rationality and progress. When researchers take for granted that planned strategies and structures are necessarily more rational than historically accumulated ones in organizations, or that change agents are necessarily more altruistic and far-sighted than those labelled "resisters", the field risks becoming uncritical (Gioia & Corley, 2002). While some clusters of research do portray organizational pasts as a resource or embodiment of wisdom (Hibbert & McQuade, 2005; Hibbert & Huxham, 2010; Lockwood & Glynn, 2016), the concept of tradition provides a way to group these studies and help management scholars assess the custodianship of traditions as potentially a no less important aspect of organizational management than leading change.

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**Table 1: Overview of Traditions Literature**

| Perspective | Theoretical approach | What is researchers' interest in tradition? | How are actors conceptualized? | Examines development over time? | Explanation used for persistence or success of tradition | Primary level(s) of analysis | Selected representatives of approach |
|---|---|---|---|---|---|---|---|
| **Tradition-as-Constraint** | Enlightenment | As a precursor or barrier to modernity | Ignorance or intimidation lead actors to follow tradition instead of their capacity for rational thought | No | Elites use tradition to defend their position in society | Universal | Kant (1783); Voltaire |
| | Foundations of Sociology and Anthropology | As a precursor or barrier to modernity | Tradition represents habitual modes of behavior that guides unreflective actors | No | Some traditions fulfill functions for the group such as rites of passage | Societal, Civilizational | Durkheim (1893; 1912); Van Gennep (1960); Weber (1905; 1978) |
| | "First Wave" Organizational Culture Research | As a means of diagnosing organizational culture<br><br>As a mechanism solving organizational problems | Actors undergo changes in beliefs and social position | No | Traditions serve as rites which transform the status of individuals and organizations | Organizational | Deal and Kennedy (1988); Trice and Beyer (1984; 1993) |
| | Critical | As a means by which elites maintain status hierarchies | Elites invent and orchestrate traditions to control non-elites | Sometimes | Traditions are useful to elites because they symbolically communicate power structures | Organizational, Societal | Di Domenico and Phillips (2009); Hobsbawm and Ranger (1983); Rosen (1985; 1988); Rowlinson and Hassard (1993) |
| | Civilizational | As a means of explaining modernization, international relations, and conflict | Actors respond to context according to inherited traditions | Sometimes | Traditions are too deeply embedded in values, beliefs, and institutions to change in the short-term | Societal, Civilizational | Eisenstadt (1973); Huntington (1993; 1997) |

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| **Tradition-as-Resource** | Counter-Enlightenment | As a repository of wisdom accumulated through the ages<br><br>As authentic expression of national culture | Actors use culture to express themselves or guide their decisions | No | Tradition provides order to societies more effectively than individual reasoning | | Burke; Joseph de Maistre; Johann Gottfried Herder |
| | Sociological Reformulations | As cultural practices transmitted across generations | Actors are custodians who actively guide, adapt, and transmit traditions | Yes | Tradition accomplishes collective goals, including identity formation, innovation, and social stability | Field, Societal | Gusfield (1967); Shils (1981); Shoham (2011); Soares (1997); Stinchcombe (1965) |
| | Institutional Theory | As institutionalized practices that structure organizational life | Custodians primarily maintain traditions | Yes | Traditions persist when they become institutionalized<br><br>Traditions as institutions regulate behavior of actors | Organizational, Societal | Dacin & Dacin (2008); Dacin, Munir, and Tracey (2010); Shils (1981); Soares (1997) |
| | Field Theory | As a means by which actors create and change fields | Custodians organize and participate in traditions for social benefits | Yes | Institutional and performative processes structure fields | Field | Anand and Jones (2008); Anand and Watson (2004) |
| | "Second Wave" Organizational Culture Research | As a stock of intangible resources in organizations | Custodians use and recombine traditions to support desired identities, images, memories, and boundaries | Yes | Traditions create social realities for audiences by having resonance within a cultural frame | Group, Organizational | Fine and Hallett (2014); Foster, Suddaby, Minkus, and Wiebe (2011); Hatch & Schultz (2017); Howard-Grenville, Metzger, and Meyer (2013); Schultz and Hernes (2013); Walsh and Flynn (2008) |

**Table 2: The Custodianship Framework**

| Custodial role | Type | How does actor engage with tradition? | Involves personal change for actor? | Involves change of social status for actor? | Phenomena of interest | What power does custodial role grant over the tradition? | Relevant theoretical approach(s) |
|---|---|---|---|---|---|---|---|
| Organizer | Curatorial | •Establishes tradition <br>•Adds, modifies, or removes elements of a tradition | No | Sometimes (e.g., prestige) | •Tradition itself <br>•Macro-level outcomes of tradition | •Organizing material and performative aspects of tradition <br>•Selecting performing audience | Institutional Theory; Field Theory; Critical |
| Carrier | Curatorial | •Brings tangible and intangible elements of traditions into new contexts <br>•Adds, modifies, or removes elements of a tradition | No | No | •Tradition itself | •Selective carrying of ideas used to organize traditions | Institutional Theory; New Organizational Culture Research |
| Performing audience | Audience | •Enacts tradition according to available elements <br>•Regulates participation of other actors in tradition <br>•Experiences tradition enacted by others | Sometimes (e.g., new identity) | Sometimes (e.g., new social position) | •Personal experience <br>•Micro-level outcomes of tradition | •Participation affects performative outcomes (e.g., enthusiasm) | Early Organizational Culture Research; Critical |
| Regulative audience | Audience | •Provides social evaluation of desirability or appropriateness of a tradition or its specific enactment <br>•Provides tangible and intangible elements for the enactment of a tradition within a context <br>•Regulates participation of other actors in tradition | No | No | •Tradition itself | •Affects performative outcomes, e.g., prestige <br>•Facilitates or hinders continuation of tradition | Institutional Theory; Field Theory |

## Table 3: Distributed Custodianship

| Custodial position | | Interaction with organizers | Interaction with carriers | Interaction with performing audience | Interaction with regulative audience | Research questions raised |
|---|---|---|---|---|---|---|
| **Curatorial roles** | Organizer | •Unity among organizers provides access to pooled resources<br>•Distribution among organizers creates potential for conflict (destabilizing tradition) or truce (stabilizing tradition) | •Unity with carriers stabilities traditions and encourages their efficacy<br>•Distribution with carriers destabilizes traditions and discourages their efficacy | •Unity with performing audience encourages use of tradition for generating solidarity<br>•Distribution with performance audience encourages use of tradition to maintain status hierarchies | •Unity with regulative audience strengthens organizers' ability to control traditions<br>•Distribution with regulative audience weakens organizers' ability to control traditions | •Under which conditions do traditions maintain versus weaken status hierarchies? Can a particular tradition do both?<br>•How do organizers balance the conflict between a tradition's internal organizational function and their acceptability to regulative audiences? |
| | Carrier | - | •Unity among carriers transmits a consistent cultural background for a tradition<br>•Distribution among carriers encourages diffusion of multiple versions of tradition | •Unity with performing audience places greater potential and demand for authenticity<br>•Distribution with performing audience allows carriers to interpret traditions for performing audiences (sensegiving) | •Unity with regulative audiences places greater potential and demand for authenticity<br>•Distribution with regulative audiences creates tensions between authenticity and acceptability to audiences | •How do actors' experiences, such as the past stability or instability of a tradition, affect their willingness to edit traditions in their role as carriers?<br>•How do carriers transmit traditions in the presence of audiences with prior exposure to the tradition versus those without? How do the motives of carriers affect this process? |

| | | | | | |
|---|---|---|---|---|---|
| **Audience roles** | Performing audience | | | •Unity among performing audiences provides a shared cultural background, facilitating efficacy<br>•Distribution of performing audiences provides fragmented cultural backgrounds, creating tensions on efficacy | •Unity with regulative audience emphasizes efficacy of traditions in their change or persistence<br>•Distribution with regulative audiences creates tensions between efficacy and external evaluations | •Do changing traditions create social boundaries between cohorts of incoming organizational members? |
| | Regulative audience | | | | •Unity among regulative audiences makes evaluations consistent<br>•Distribution among regulative audiences provides alternative evaluations and resource pools | •How do traditions under the regulation of diverse audiences retain their efficacy? Does it make a difference whether regulative audiences are concerned with the same or different aspects of the tradition? |