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# A performative perspective on stability and change in organizational routines

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This paper is about stability in organizational routines. It proposes a new explanation of stability, based on mindfulness rather than mindlessness. Traditional explanations of stability (or lack of change) in organizational routines suggest that organizational participants are not thinking about what they are doing, but repeating actions that they have taken in the past. In this paper I suggest that stability can also occur because organizational participants are making conscious efforts to understand what actions make sense in the context in which the work is being performed. The argument is that organizational participants use what they understand about how the organization operates to guide their performances within the routine. Relevant performances, such as the performances of supervisors, are integral to what people understand about how the organization operates. Organizational members use these understandings in choosing whether to enact the requested change. In so doing, they create and recreate the understandings about how the organization operates. This explanation is similar to performative explanations of change in organizational routines, though these explanations have focused on the effect of doing the routine on the production and reproduction of the routine rather than the production and reproduction of understandings about how the organization operates.

## 1. Introduction

Students of firms and other organizations have long recognized routines as an important element of organizational behavior (March and Simon, 1958; Cyert and March, 1963; Nelson and Winter, 1982). Routines are a principal engine for the work that firms, organizations and even markets accomplish (Cohen *et al.*, 1996). From an evolutionary perspective, routines are important to the reproduction of firms (Nelson and Winter, 1982; Miner, 1990, 1991; Baum and Singh, 1994). From a resource-based perspective, routines contribute to the dynamic capability of firms (Teece and Pisano, 1994; Teece *et al.*, 1997) and the ability of firms to regenerate (Tranfield and Smith, 1998). They are important in a variety of ways to the ability or inability of organizations to adapt to changing circumstances (Pentland and Rueter, 1994; Pentland, 1995; Adler *et al.*, 1999; Feldman and Rafaeli, 2002).

Most theories of routines have conceptualized routines as stable (March and Simon,

1958; Cyert and March, 1963; Nelson and Winter, 1982; Egidi in Cohen *et al.*, 1996: 695). These theories are based on conceptualizations that liken routines to individual habits (Stene, 1940; Simon, 1945; Nelson and Winter, 1982), computer programs (March and Simon, 1958; Cyert and March, 1963; Gioia and Poole, 1984; Carley, 1996a,b; Carley and Lin, 1997; Levitt *et al.*, 1999), or genes (Nelson and Winter, 1982). These conceptualizations diminish the role of agency or mindfulness in the operation of organizational routines (Feldman and Pentland, 2003). Indeed, the cognitive efficiency and reduction of complexity attributed to organizational routines (March and Simon, 1958; Simon, 1981; Cohen *et al.*, 1996) diminish the need for organizational participants to think. Thus, the story goes, organizational routines are the relatively mindless repetition of actions that have been established either through evolution or through the conscious design of someone other than the people participating in the routine.

Though routines have traditionally been associated with stability and inertia, scholars have noted their relation to organizational adaptation (Cyert and March, 1963; Naduzzo *et al.*, 2000; Feldman and Rafaeli, 2002), mutation (Nelson and Winter, 1982), evolution (Miner, 1991; Baum and Singh, 1994), innovation (Miner, 1990), flexibility (Pentland and Rueter, 1994; Adler *et al.*, 1999), improvisation (Moorman and Miner, 1998a,b) and learning (Levitt and March, 1988; Miner, 1990; Cohen and Bacdayan, 1994; Feldman, 2000).

Though understanding change and stability may appear to be different enterprises, several ways in which organizational routines have been understood enable us to see that the dynamics of stability and change may be quite similar. Some scholars, for instance, use the vehicle of cognitive efficiency to explain both stability and change. They suggest that exogenous shocks that are sufficiently large may overcome the benefits of cognitive efficiency that organizational routines afford (Gersick and Hackman, 1990). Exogenous shocks include such things as adaptation to changed or new circumstances (Naduzzo *et al.*, 2000) and adjusting to changes in technology (Barley, 1986). Other scholars explain both stability and change from an evolutionary perspective. Stability occurs because routines that work are maintained and reproduced. Change is understood as mutation (Nelson and Winter, 1982), incomplete copying (Baum and Singh, 1994) or the introduction of variation (Miner, 1990, 1991; Miner and Haunschild, 1995).

The performative perspective presented in this paper also suggests that stability and change stem from the same dynamics, but breaks with the traditional perspective by suggesting a larger role for agency on the part of the organizational participants that perform routines. The performative perspective emphasizes the role that performances, or the actions people take that enact the abstract idea of an organizational routine, play in what people understand they are doing when they enact organizational routines (Orlikowski *et al.*, 1995; Orlikowski, 1996, 2000; Feldman, 2000; Feldman and Pentland, 2003). The dynamic is a recursive relationship between understandings and performances as described in practice or structuration theory terms (Bourdieu, 1977, 1990;

Giddens, 1979, 1984, 1993). The performances create and recreate the understandings while the understandings constrain and enable the performances. Feldman and Pentland (2003) show that the mechanisms of guiding, referring and accounting help to produce legitimate variations on performances that create, maintain and modify the idea of the routine. These mechanisms can explain why routines do change, but they can also explain why routines do not change. Thus, from a performative perspective, the mechanisms of change and the mechanisms of stability are the same.

This paper extends the earlier work in two respects. First, it extends the performative perspective to include the larger organizational context as part of what is relevant to the actions that organizational participants take in organizational routines. The analysis in this paper shows that, when people think about what actions they are to take in an organizational routine, they are not confined to thinking about performances of the routine they are enacting but may think broadly about a wide variety of organizational performances. While earlier work in this area acknowledges that there is ambiguity about what performances are relevant to any particular routine, the fundamental focus has been on how past and current performances of a particular routine influence future performances of the same routine. I propose that, in addition to the recursive relationship between understandings about how the organization operates and performances of a particular organizational routine, there is a recursive relationship between understandings about how the organization operates and other relevant performances, including other routines as well as performances that are not of a routine nature. These relationships are illustrated in Figure 1.

Secondly, this paper suggests that we look for particular features of performances that are relevant. My definition of relevant performances is based on categories developed in structuration theory (Giddens, 1979, 1984). Giddens argues that three aspects characterize any social structure: signification, domination and legitimation. These three aspects of structure manifest themselves in three kinds of interaction: communication, power and sanction. These modalities help to identify what is relevant about a performance. Relevant performances are actions that are signified in that they are known to others in the organization. People have picked them out of the stream of ongoing actions and communicated about them. They have the characteristic of dominance in that they are often taken by or supported by powerful people in the organization. They are legitimate in that they carry the promise of positive sanction or their absence carries the threat of negative sanction. These relevant performances help people construct an understanding of how the organization operates which helps them determine what actions it makes sense to take in a specific routine. The actions people take in a specific routine can, in turn, be relevant performances that contribute to creating understandings about how the organization operates.

The case I explore in this paper is a case in which a change that the supervisors wanted did not take place. It is one of five routines I studied in the same organization over a period of 4 years. The other four routines changed substantially (Feldman, 2000). For three of the routines the supervisors were actively involved in the changes; one

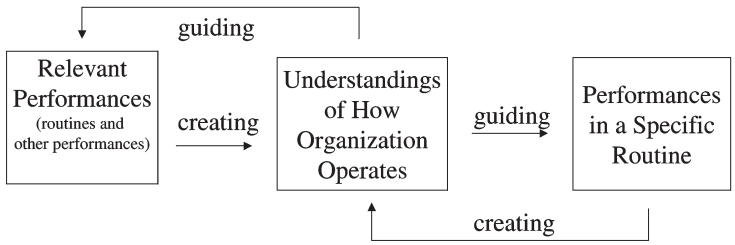


Figure 1 Interactions of performances and understandings.

routine changed as a result of grass-roots adoption of an innovation. All three of these cases in which the supervisors were involved also began with substantial support from the subordinates. In two of the cases the subordinates later had second thoughts and some subordinates engaged in acts that subverted the changes (Feldman, 2003).

The case I discuss in this paper stood out as the change that would not occur. As I describe more fully below, that the routine would not change is curious. The routine was a relatively minor part of a larger routine, managers were pushing the change and no one was against it and the organization was one in which change in other routines was taking place. After several years, concern about why the change would not occur led to a series of meetings of the supervisors to try to understand why the change was not taking place and how to bring it about. I draw heavily on these discussions as well as on discussions of the people who were not producing the requested change in behavior in the examination of the case.

In the following, I present information about the case and how I gathered data for this case. Then I analyze the case with respect to ideas about how the organization operated and could operate and in relation to other performances that participants in the organization related to the organizational structure that the supervisors were trying to promote through their proposed change in the routine. In the discussion that follows, I explore what features of the routine may have influenced the choice of performances. Finally, I discuss the implications for understanding change in organizational routines.

## 2. The case

The case takes place in the housing division of a large state university. This organization provides housing in 12 residence halls for approximately 10 000 single students. One could say that this organization operates dormitories, and in some respects this is true. But it gives the wrong impression. The people in this organization are extremely committed to providing a living environment that helps students deal, in a variety of ways, with the stresses of university life. Saying that they run dormitories does not capture this commitment, which is part of why they refer to the halls as residence halls instead of dormitories. Their commitment is not only expressed in such surface manifestations, but also in the almost continuous development of new programs (e.g.

to increase the speed of repairs, to diversify food options in the cafeteria, to provide more and better access to computers, and so forth) and in discussions of how to implement or improve old programs. The budget discussions were always interesting in this respect. While the financial aspects of any decision were important, discussion often centered on how it felt to live in a particular hall and what would make it easier or more pleasant to live there.

### 3. Data gathering and analysis

I was a participant observer in this organization from the fall of 1986 through the summer of 1990. Throughout the entire period I had extensive contact with members of one unit of the organization (Residential Life) and some contact with members throughout the organization. In general, I spent from 5 to 10 h a week in observation and conversation. During one period, I was able to spend about 20 h a week. Altogether the time I spent in this organization was approximately 1750 h. In addition I was able to collect over 10 000 electronic mail messages. In short, my contact with this organization was extensive and intensive.

The budget routine provided me with the most extensive contact throughout the organization. I observed aspects of this routine between 1986 and 1990. In 1986, 1987, 1988 and 1989, I sat in on the meetings of the associate and assistant directors which took place over a two week period in the fall. In 1987 I also sat in on the meetings of the building-level managers in three residence halls. In 1989 and 1990 I attended several meetings of assistant directors in which they specifically talked about the routine. Throughout the four years, I discussed the budget process and outcomes with members of the organization.

The quotes I use in this paper are from field notes taken during the observations of building-level manager meetings in 1987 and during the budget meetings of 1986, 1987 and 1988 and from three kinds of meetings that I audiotaped. The taped meetings were meetings of the supervisors during the budget process, meetings of the supervisors about the budget process and meetings of Residential Life building managers and supervisors that included discussion relevant to the budget process. All of these meetings took place in the last year of observation (1989–1990).

It is always hard to say where data gathering stops and data analysis begins. Whether explicitly as proposed by Glaser and Strauss (1967) or implicitly, one is always trying to make sense of one's data and thinking about what more one can find out. My approach at this stage was to find out as much as I could about the organization, its members and the routines they were engaged in. This is partly because my initial question of why routines do not change was replaced before long with a more general question about how to make sense of routines that sometimes change and sometimes do not. Conscious analysis of these data waited until the formal observation period ended.

Formal analysis involved three steps that took place roughly concurrently and over a period of several years. The first step was to write a manuscript that pulled together the

information I had gained about both the organization, in general, and the specific routines. This manuscript included detailed descriptions of organizational units and positions, organizational culture and attitudes and dispositions of individuals as they pertained to the organizational routines I studied. It also contained detailed descriptions of each of the routines, who had participated in them, what they had done and how the routines had changed over the years of observations. I circulated this manuscript within the housing organization for comments to make sure that what was contained in it captured the sense of the organization.

The second step involved using several different meta-theories to think about this information. The meta-theories I used were ethnomethodology, semiotics, dramaturgy and deconstruction (Feldman, 1995). These meta-theories all have assumptions that were consistent with the setting I was concerned with. They each allowed me to develop new understandings of the data I had gathered without going beyond what I had actually observed or been told. The reason for this part of the analysis was consciously to break the order of information as it had been presented to me. I did not discount the original order, but sought to develop alternatives.

The third step took place once I had found some theories that helped me to think about both change and stability in organizational routines. The theories I found most useful were structuration theory (Giddens, 1979, 1984, 1993) and the theory of practice as developed by Bourdieu (1977, 1990), Lave (1988) and Ortner (1984, 1989). As I read these theories, I used the concepts to organize my observations of the routines. This exercise led me to an appreciation of the relationship between action and structure through the medium of practice. This appreciation underlies much of what I understand about why and how organizational routines change.

A final step is ongoing as I write articles in which I try to explain what I have come to understand and why I believe it is important. The effort involves shaping the data in a way that will help people to understand the point I wish to make without violating the sense of the observations. The reason for this effort is that ethnographic research yields observations that are relevant to many points of theoretical interest and these observations are tangled and interwoven in the fabric of everyday life. As I attempt to pull out and follow one strand, I must make decisions about what constitutes a 'strand' and about what surrounding fabric needs to be explained in order to make sense of the 'strand'. During this process I find that questions arise that did not arise from any of the previous analytical efforts. I take this to be a function of the richness of the data rather than a failing of any of the earlier analytical efforts.

#### **4. The budget routine**

The routine I discuss in this paper is a budgeting routine. The task accomplished by the budget routine was the allocation of approximately 7 million dollars per year for the maintenance and renovation of the residence halls. There are three organizational divisions that are most relevant to the budget routine: Facilities takes care of main-

taining the interior and exterior of the building and the grounds and the furnishings, Food Service provides meals for the residents, and Residential Life provides educational support (computers, libraries, etc.), counseling and community support for residents. Each of these units has a manager in each residence hall that I refer to as building-level managers. Each of these units has associate and assistant directors who attend the budget meeting (see Figure 2).

The budget routine includes several steps. First, information is sent out to the building-level managers about how much money is available for their building. Next, the building-level managers provide information to the assistant directors to whom they report, or in the case of Residential Life to the associate director, about the projects they would like to have funded in their buildings. Then, the associate directors and the assistant directors who attend the budget meeting (see Figure 2) meet several times to discuss which projects can be funded. They provide a proposed budget to the director of Housing. Depending on the director's response, the associate and assistant directors may need another meeting or they may be able to make adjustments through informal discussion. Once final decisions are made, information is sent out to the building-level managers about what projects will be funded in their buildings. This decision-making routine takes 3–4 months from beginning to end, though the time of intense engagement for any participants is considerably shorter.<sup>1</sup>

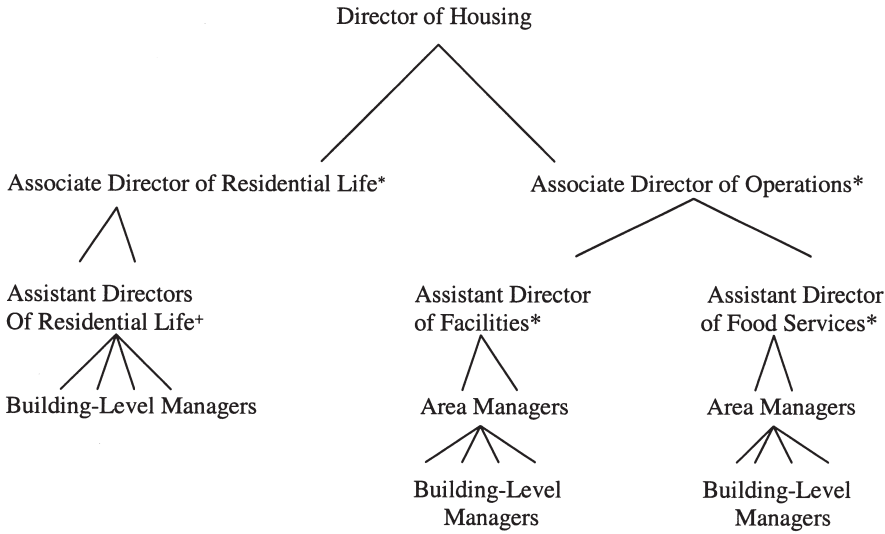
During the time I observed this routine the associate and assistant directors wanted to make a change in it. They wanted their subordinates (the building-level managers) to submit to them a single list of projects for each residence hall. Thus, instead of each organizational unit (Facilities, Food Service and Residential Life) creating a list for each building for a total of 36 lists, the three building-level managers would create a consensus list for each residence hall, for a total of 12 lists. As I explain later, this request is consistent with an idea that the organization could provide better service if the building-level managers worked together as a team and took joint responsibility for what happens in the residence hall.

At first this request may seem very minor. It certainly seemed so to the associate and assistant directors. It seemed to them to be analogous to what they have to do to make a recommendation to the director, and it seemed to them to empower their subordinates to resolve disagreements amongst themselves. The consensus lists, however, did not materialize, at least not to their satisfaction. Over the 4 years of observation, they advised their subordinates, they exhorted their subordinates and they created forms for their subordinates to fill out. Nothing worked.

As already discussed many of the standard explanations for why routines do not change can be ruled out in this case, but the associate and assistant directors in this case suggest an intriguing alternative. The most cogent statement about the difficulty of changing the budget routine came during a discussion they had about the process in

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<sup>1</sup>This is a generalized version of the routine that summarizes what actually happens. In fact, there are always variations. For instance, not all building-level managers get information about how much money is available, some building-level managers get the information some years and not others, etc.



**Figure 2** Hierarchical chart for housing. All roles marked with an \* participated in the supervisors’ budget meetings every year of the observation. +One of the assistant directors of Residential Life participated in the supervisors budget meetings in 1989 but not before.

1989, after 4 years of trying to change the routine. They had just finished their meetings for that year and the assistant directors from Food Service, Facilities and Residential Life were all planning to meet the next week to talk about how to encourage the change. All of the associate and assistant directors who attended the budget meeting spent about an hour at the end of the last budget meeting discussing the process. During the course of this conversation Kevin,<sup>2</sup> the assistant director of Facilities said:

We’re kind of talking about a different way of Housing operating because you really can’t operate [the budget routine] differently than how you operate day to day . . . How we do [the budget routine] should be consistent with how we do day to day operations, not the same way, but within the same philosophy. (November 22, 1989, tape 1, side B @240)

In other words, the supervisors were suggesting that the explanation for the lack of change might lie in the understandings about how work takes place. The relevant context in this case is Housing and the way it operates day to day. What kind of organization is this and how does one operate within it?

In the meetings the assistant directors held over the following weeks, they articulated the aspects of the organization that they wanted to emphasize, their vision of the organization they wanted to create. The vision had several features. One feature was the notion of a cooperative community at the building level. Another feature, implicit in

<sup>2</sup>All names are fictitious. The people, however, are quite real.



the first, was that the members of the community each have enough power to make a difference in the community. A third feature was that as a group they feel a sense of responsibility and ownership (stewardship) toward the building. Take, for instance, the following comment made by Kevin:

*... what you want is a community of people at the building level who say 'this is our building'. No one is going to sacrifice if they are living in a home, no one is going to ignore the roof leak if it's really their house, they know if they don't get the roof leak done sooner or later they are going to pay a lot (emphasis in original) of money repairing walls and furniture and everything else and so if they've got the money they're going to take care of it and I think it has to do with the nature of the process in terms of how much in our whole way, organizational way, of doing things in terms of whether or not people really feel this is their building or this is the building that they are the stewards of as as (sic) a community. (November 22, 1989, tape 1, side A, @270, emphasis added)*

Each feature of the vision was already present in the organization, both at the associate and assistant director level and within the behavior of their subordinates, but it was not the only mode of operating. The new subroutine of the budget routine would, in the eyes of the associate and assistant directors, both emphasize these features in the organization and show that they represent the dominant mode of operating. In Giddens's (1984) terms, the new subroutine would be both medium and outcome. In this dynamic relationship, the new subroutine would help to bring this organizational vision into prominence, if not dominance, by building on the features that were already present.

## 5. Analysis

In the analysis that follows I show that for each of the three features of the vision there were relevant performances that endorsed a different vision of the way the organization operated. These relevant performances drew on and reproduced aspects of the organizational structure that were contrary to the vision articulated by the associate and assistant directors. These performances inhibited the emergence of the new performances that would enact the vision the associate and assistant directors had of the organization.

Ironically, it is the associate and assistant directors' behaviors that are associated with inhibiting the emergence of the vision they articulated. Their subordinates widely valued the vision of the organization as cooperative, team-oriented and based on stewardship. But they did not see it enacted by their supervisors or supported by the organizational structure. Thus, both supervisors and subordinates continued to enact an organizational mode of operating to which many, if not most, did not subscribe. In

the following analysis, I take each feature of the vision and discuss the subordinates' views of how the associate and assistant directors' actions related to this feature.

### *5.2 Cooperative community*

The consensus lists the associate and assistant directors wanted both required and signified that a cooperative community was operating within the buildings. Creating the consensus lists would require the building-level managers to work together, to discuss the needs of the building and to come to a decision jointly about what projects should be funded for the following year. Rather than the consensus lists these supervisors envisioned, two kinds of lists tended to be submitted from the buildings. One kind of list was submitted by an individual building-level manager and consisted of the projects that person thought needed to be funded. In general, these lists were constrained by some notion of how much funding was available for that unit in that building. A second kind of list was submitted by all of the building-level managers in a residence hall and, thus, was a composite list. These lists, however tended to list everything that each building-level manager thought needed to be funded even if the resulting project lists greatly exceeded available funds. Sometimes these two strategies were combined with different units turning in the same project lists but assigning different priorities to the projects.

Thus, the kind of cooperation that the associate and assistant directors envisioned was systematically not forthcoming. Even when the building-level managers worked together, they did not generally submit the kind of list that these supervisors envisioned. The behavior of the associate and assistant directors provides some clues about why consensus lists did not emerge. In fact, two kinds of performances tended to inhibit the cooperation they asked for in the budget routine. One kind of performance was part of the budget routine; the other was not. First, in the budget routine itself, the supervisors engaged in competitive behavior that directly contradicted the cooperation they asked for. In other contexts they engaged in actions that disrupted cooperation among their subordinates.

In the budget routine, the associate and assistant directors could not turn in a list that greatly exceeded expenditures. When requests exceeded resources, which was almost always, they engaged in what the Associate Director of Operations referred to as 'horse-trading' (tape 1, side B, @270). Horse-trading consisted of going around the table and everyone giving up a project or part of a project. While the associate and assistant directors (at least mostly) professed the same sense of community that they requested of their subordinates, this divvying up of projects made clear that they always had a sense of whose projects were whose. While there is nothing wrong with this process, it does suggest that even though they wanted their subordinates to check their unit hats at the door and consider only the good of the building as a whole, they did not act in this way themselves.

The horse-trading turned into actual rivalry between the Associate Director for Residential Life and the Assistant Director for Food Services. The following scenario is

not unusual. The associate and assistant directors were going through the lists of projects looking for things they could cut out. As they looked at the lists, Ned, the Associate Director of Residential Life volunteered projects that he could give up. He made it clear that he expected others to follow his lead. At one point after giving up several projects, he said, 'I'd better hear someone else giving up some items'. He paused and continued in an aggressive tone, 'Yak, that means you'. Owen Yak (the Assistant Director for Food Service) replied that he hadn't asked for much so he didn't need to give up much. Later in the meeting Howard, the Associate Director of Operations and Yak's boss, did finally push Yak to give up some items.

People at the building level were well aware of this rivalry. The Residential Life Building Managers I shadowed all commented on it. One of them said that 'the budget process is a time when Ned goes up against Yak'. She talked about how Yak seems to get anything he wants and that annoys Ned (October 29, 1987). Comments from the Building director in Village Hall corroborated this view. It was her impression that Owen Yak used to negotiate ahead of time and 'take his items off the top'. She said that Food Service used to get things that they did not even need. In Village Hall, the building-level Food Service manager had sometimes refused items because the money was needed for other projects in the building. But she thought it was unusual to do that and that he could get away with it because he had been around for a long time and he had a strong reputation. She felt that things were starting to change as far as Yak was concerned, but that the process still promoted 'narrow interests and competition'. She said, 'there are Residential Life building-level managers who will ask for money for programs even when the roof needs fixing'. The third Building director also characterized the current system as promoting 'territorial responses'. He said that everyone is worrying about his or her own area and not about the building as a whole. The rivalry made it particularly difficult for Food Service and Residential Life building-level managers to work together on the budget. As the above quotes suggest, the competition affected the process as a whole resulting in 'territorial responses' and 'narrow interests'.

This competition draws into question who building-level managers should be working with during the budget routine. Should they be coordinating with other building-level managers or should they be promoting the interests of their direct supervisors? The issue of coordination is also raised by how much the associate and assistant directors promote the idea of working together at the building level. While the rivalry described above was mostly between Food Service and Residential Life, mixed messages about the importance of teams came from Facilities as well.

As mentioned above, the vision associated with the new budget routine included a notion of the building-level managers acting as a team or a community. Even despite the rivalry at the supervisory level, some groups of building-level managers made great efforts to work as a team. They recognized that Housing's formal structure consisted of parallel columns without any connections between units and as one Residential Life manager said 'you know we talked about all these parallel columns and there's no link

and so we said “ok, let’s build these little threaded bridges” which basically are hard to build and are based on personalities and things . . .’ (Building director role report meeting, 4/19/89 #2 side A @305). Most of the associate and assistant directors encouraged the team building. In 1987, for instance, one of the Residential Life building-level managers commented that ‘there is nothing in writing sanctioning the building meetings. Lambert (Associate Director of Residential Life) and Willis (Assistant Director of Facilities) push them and Yak (Assistant Director of Food Service) does not appear to oppose them’ (interview, October 20, 1987). But some of their actions made this team building difficult. The following excerpt from a meeting of Residential Life building managers and assistant directors discusses an incident where Facilities management came in to talk about the importance of teams and simultaneously made decisions to disrupt the teams that had been established. The speakers were quite upset about this and spoke in a somewhat agitated manner.

Helene: They just like shuffled all their Facilities managers without even telling them—like you come in one day after they say ‘build teams, go to weekly meetings . . .’

Pearl: how much they were going, how important it was for us to have teams and the building team was going to be a strong unit and they really wanted us to . . .

Helene: and then they were gone and the new people were here . . .

Pearl: and that day *as they were talking to us*, three buildings were getting switches and not one acknowledgment for 1 Building director or Food Service managers—and they are as mad about this as we are—but that was done . . .

Patrick: and simultaneously changes for me with Food Service managers as well

Pearl: and no concern

Helene: so a place like Dinkel Hall had a complete fruit basket upset at what has been termed as like the one point—you know we talked about all these parallel columns and there’s no link and so we said ‘ok, let’s build these little threaded bridges’ which basically are hard to build and are based on personalities and things and I mean . . . and (they) just like blew it out of the water. [There followed a brief discussion of how Helene had won out on these switches and then Helene continued.] what I heard was just the hypocrisy of it—and how you had worked so hard to network and make these and then—it’s not like people were saying ‘I want to interview them and we pick . . .’

Pearl: no, not at all

Helene: he was just saying 'Call me an hour before so I don't feel like a dunce and all of a sudden the names change'

Patrick: Yeah—it was like Monday I met a new Food Service manager and Friday I met a new Facilities managers and that's how I found out. (Building director role report meeting 4/19/989 #2, side A, @298)

Thus, we see performances that promote and performances that inhibit cooperation. Performances that create the organization as cooperative include the actions of the associate and assistant directors that encourage team-building and the building-level managers creating what they referred to as those 'threaded bridges'. 'Horse-trading', rivalry among the associate and assistant directors, territorial responses to the rivalry on the part of the subordinates and disruption of the building teams by management tend to create a competitive organization. The cooperative ideal encourages sub-ordinates to take actions that will create the structure within the organization. The history of competition and rivalry at this point appears to be stronger, but both qualities of the organization are evident.

While the request for consensus lists in the budget routine potentially promotes cooperation and encourages the building-level managers to work together as a team, this request comes in the midst of actions that promote a competitive organizational structure. The rivalry between some of the associate and assistant directors makes it difficult to trust other building-level managers because you know that they might be pressured by their supervisors. Only someone who is in a very strong position like the Food Service manager in Village Hall can repeatedly go against his or her supervisor's wishes. The disruption of the teams casts doubt on how important team building really is to the supervisors and whether subordinates will be rewarded for engaging in this effort. The rivalry suggests they may actually be punished. At the very least, the message is mixed.

## 5.2 *Equal power*

The consensus lists the associate and assistant directors asked for required that the building-level managers be able to negotiate with one another about projects that may affect them differently. Scholars have noted that differences in power inhibit the ability to negotiate (Lewicki and Litterer, 1985; Zartman and Rubin, 2000). While all of the building-level managers were the highest level of their unit within a particular residence hall, many performances indicate that there were rather large differences in power.

First, the different building-level managers played very different roles in the life of the residence hall. While each of the managers manages her or his own area, the Residential Life manager was in many ways seen as running the residence hall as a whole whereas the Facilities and Food Service managers were seen as having more delimited functions within the residence hall. In fact, the Residential Life managers were uniformly called Residential Life building-level managers even though this was not

their official title. There are many ways that the building-level managers acted that contributed to the impression that the Residential Life manager was really in charge.

The Residential Life building managers performed a different kind of work than the other building-level managers did. The Residential Life building managers were the historical successors of the housemothers with a residue of *in loco parentis*. As such their work entailed the lives of the residents in the broadest possible sense. They were particularly concerned with any aspect of a resident's life that would make it difficult for him or her to live in a community with up to 1300 other people, and they were concerned with the health of the community as a whole. They had extensive contact with the residents in the buildings and, thus, heard problems and complaints about all areas of the building including Facilities and Food Service. They managed teams (some of them rather large) of resident staff who further increased their contact with the residents.

Maslow's hierarchy was often used within Housing to describe the work of the Residential Life building-level managers in relation to the other building-level managers. Their work was considered to relate to the upper levels of Maslow's hierarchy (e.g. self-esteem, self-actualization) while the work of Facilities and Food Service was seen as relating to the lower levels of the hierarchy (e.g. physical well-being). The theory proposed by Maslow (1943) was that lower levels need to be satisfied before higher levels can be attended to. The application of this theory in this case was that for Residential Life building-level managers to do their jobs well, the Facilities and Food Service managers need to have done their jobs well. This hierarchical perspective provided a rationale for the Residential Life managers to be involved in everything that happened in the buildings, even those things that were clearly the domain of Facilities or Food Service.

These work performances were supported by physical arrangements, the most visually obvious was in the location and style of the offices of the three building managers.<sup>3</sup> The Residential Life manager's office was generally what you would consider the 'front office' of the building. They were almost always very close to the front door of the building and to the information desk. These offices were generally spacious and well furnished with areas for people to sit and talk as well as a desk area (and computer) for doing paperwork. If someone were looking to complain about something in the building, they would easily find these offices. By contrast, the Facilities manager's office was almost always in the basement. It was generally small, windowless and not highly decorated. It was apt to have cleaning equipment and maintenance tools in it. The Food Service manager's office was in the cafeteria/kitchen part of the building. These offices were also likely to be small and windowless. They generally gave onto the kitchen area and one often needed to walk through a kitchen to get to these offices. Both the Facilities and Food Service managers' offices were relatively difficult for a newcomer

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<sup>3</sup>Conditions were different in every building. While the specifics may be different from building to building the general characterization is consistent.

to the building to find. Certainly if someone were coming to complain about the building, they were unlikely to find their way to either of these offices.

The Residential Life managers were also higher in hierarchical position than the other managers. They tended to be more educated and were generally paid more. They had secretarial support whereas most of the other managers had none. They were professionals and they went to conferences; they served on university committees; they had extensive contact with housing and student life administrators.

All of these factors mitigated against a building team in which all members felt equally empowered to speak and be heard. And, in fact, even if the building team managed to create a process in which everyone speaks and is heard, the power differences influenced the perceptions that the associate and assistant directors had of what the building teams submitted. The following excerpt is from a meeting in which some Residential Life building-level managers were talking with their associate director and the assistant directors who has been involved in the discussions about the budget process. The meeting was about the role of the Building director in Housing. The issue is brought up by the assistant director.

Patricia (an Assistant Director in Residential Life who attended the supervisors' budget meetings in the last year of observation): Well the other thing I am sensing too is to some degree that when the [building] team speaks out on the issue, it appears to be a Residential Life issue and that the Residential Life building-level managers are speaking and not the team.

Helene (a Building director): Part of that makes sense because the Building director can do it because the Building director is the most educated, the most used to doing that, so to a certain extent that leadership role is not just accidentally thrust but it does the same . . .

Patricia: but it discounts the whole team concept and its . . .

Helene: Yup

Patricia: and it's also discounting what Food Service and Facilities basically said to us and supposedly to their managers 'we want you to become leaders, we want you to speak up and help solve problems' and yet when they start to do that, all of a sudden they are being discounted and they are being told 'well that's the Building director coming up with that, that couldn't be your idea'. (Building director role report meeting 4/19/90 #2 side A @320)

This perception was further substantiated in a discussion among the associate and assistant directors about the budget process. When they discussed Village Hall, which had produced a list that had a great deal of consensus, they came to the conclusion that the extent of unity on the project list was because 'Pearl [the Residence Life building-level manager] browbeat them into it' (tape 1, side B, @265).

The situation confronting the building-level managers in the budget routine, then, is that there are large differences in their hierarchical status and that the person with the highest status is specifically not authorized to coordinate the budget routine at the building level. Thus, there is neither hierarchical nor collegial (with everyone feeling equally empowered) authority in this part of the budget routine. The managers in different buildings responded differently to this situation. In some buildings there was no meeting of the building-level managers in relation to the budget routine. Where there were meetings, the Residential Life building-level managers played a major organizing role. They expressed ambivalence about that role. As quoted earlier, they and others saw it as natural that they would take on a leadership role, but they also recognized the drawback of that position. They noted that if they took this role, they had responsibility without authority.

In the three residence halls I observed most closely during the budget process, the Residential Life building-level managers had three different strategies for dealing with this situation. One only coordinated with the building-level manager for Facilities with whom she worked closely and had a good relationship. She expressed relief at not having to coordinate with the Food Service manager whom she said had no incentive to coordinate. Another made substantial efforts not to appear to be the leader. For example, the meetings were held in the cafeteria rather than in her office. At one meeting she asked if she could bring her secretary to the next meeting to take notes. When the building-level Food Service manager asked her why she had asked, she replied that it was not her meeting and she needed the consent of everyone before she invited another person. (Ironically, this is the Building director of Village Hall whom the associate and assistant directors characterized as having browbeaten everyone into consensus.) The third building-level manager from Residential Life took on the leadership role and made efforts to coordinate everyone's efforts. He dropped the pretense that everyone was equal and simply used the power that he had to affect the process. He was, by far, the most agitated by the process but that could as well be a consequence of personality as of strategy.

The perceptions of power differences and the actions taken that produced these differences affected the performances of the budget routine. A team of equals did not emerge, at least in part, because multiple performances that these organizational participants engaged in reinforced a perception that they were not equal. To the extent that they could ignore those other performances and act as equals in the context of the budget routine, the same supervisors who asked them to make the effort discounted their effort. This pattern appears again with respect to the next feature of the supervisor's vision, the idea that the building-level managers will take on the role of building stewards.

### *5.3 Building stewards*

The notion of stewardship implies that the building-level managers have a sense of responsibility for the buildings that influences how they think about and take care of



the buildings. But there were many ways that people acted within Housing that made clear that the building-level managers do not have the authority to execute this responsibility. For example, the following took place in Village Hall during their budget discussion. The subject was the replacement of basketball backboards in an area adjacent to the residence hall. They were considering listing \$2000 for the work.

Hugh (Food Service Manager) asked why their building is responsible for that area at all. He did not understand why it was not maintained by the athletic department. He asked if area residents did not use it—Pearl (Building director) and Fran (Office Manager) said that it was used by everyone. He said that he did not see why they were maintaining a basketball playing area that was not for the exclusive use of housing residents. Fran said that they were responsible for it because it was on their land. Pearl talked about an incident where some gardening was done on their land that they had not asked for nor even knew was going to be done, but the money for it was taken out of their operating costs because it was their land. (Field notes, October 27, 1987)

In another hall, this discussion of thermostatic controls took place:

The Facilities manager said that she was getting lots of complaints about the heat in Twin Halls. A few years ago they had had thermostat controls installed, but not all the rooms had gotten them. She said that they had just stopped putting them in and so some of the rooms cannot control their heat. The Residential Life manager asked who had put in the controls. The Facilities manager said that it was a company under contract and that they just seemed to run out of controls and quit. The Residential Life manager giggled and said that this was like something out of a Saturday night live skit. (Field notes, October 27, 1987)

Examples like this could be produced *ad infinitum*. There were lots of people, including the director of Housing, the associate and assistant directors, an architect, a mechanical–electrical engineer, an interior design group and the people in charge of conferences, each of whom could make demands on the budget of the building without consulting or even notifying the building-level managers. No one thought that the building-level managers should have control over what happens in the buildings or with the budget for the building, but rather that in order to act out stewardship that they needed to be informed and consulted in the process of decision-making.

Even within the budget process itself, there were two factors that restricted the authority of building-level managers. One is that sometimes the associate and assistant directors changed project lists after the building-level managers had met. This happened fairly frequently in Food Service, but also happened in the other units. The other factor was that the associate and assistant directors determined many big items (like asbestos abatement and smoke detectors) that required much of the budget

without consulting with the building-level managers or even telling them. Ned (the associate director of Residential Life) described this in the following way

Let me tell you something, though, that we do that feels to me a little ass backwards and that is that I think we as the senior managers have the right to set priorities in certain areas.(inaudible) . . . Folks at the building level are operating in what they, from their vantage point is in the best interests of that building and I'm glad they do but we might see a bigger picture. *But we tend to withhold that information until we see their stuff.* (November 22, 1989, Tape 1, side A, @165, emphasis added)

Later in the meeting, Kevin (the Facilities director) complained about what happens when the senior managers do not follow their normal procedure and do advise the building-level managers about a priority that has been established.

Also, you know if management up at the top end is asking for X, why cash your chips in on X? If you know it is going to be covered, go ahead and ask for your thing. I mean smoke detectors is an example. Pearl<sup>4</sup> and the people at Village Hall knew Village Hall didn't have smoke detectors, they were given a sheet of paper to that effect, they knew *very well*, but no one carried it forward on their listing. They have other priorities. They know smoke detectors are going to be covered—so that enters into the picture, too . . . What I've seen happen in our system is when management takes up the cause, other people will let go of it. It's not a community thing. (November 22, 1989, tape 1, side A, @255)

In the following excerpt Patricia (Residential Life Assistant Director) explains why she thinks that the building-level managers do not conform to the ideal of stewardship that the supervisors envision:

Patricia: I think it is hard for them to reach that point because they get mixed signals'

Kevin interjected: Yes, I agree

Patricia continued: I think at one point they think it is their building and they say it is their building and they act as if it is their building and then they get *spanked* because it is really not their building . . .

Kevin: and then they hear about something going on in their building that *they never knew was going on*, that no one ever talked about . . .

Patricia: That's right *they're not involved in it* . . . (November 22, 1989, tape 1, side A, @278, emphasis added)

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<sup>4</sup>Note that, consistent with the portrayal of domination, the Facilities director refers to Pearl, the Building director, as the person who is in charge in Village Hall.

Rather than producing a sense of stewardship, the actions described here produce a context in which stewardship is not encouraged. Lots of things happen in their buildings that the people who are supposed to be stewards have no control over, are not consulted about and may not even be told about. Similarly, lots of things happen in the budget routine that they have no control over. Associate and assistant directors change project lists and determine a large percentage of the expenditures without consulting the building-level managers. In general, building-level managers are not necessarily rewarded and may even be sanctioned for taking on the stewardship role. The comment by Patricia is particularly revealing. They are not only not in charge, they are not even seen as grown-ups since presumably only children get spanked. The implication is that their actions are not consequential. It does not matter what they say during the budget routine about how the money should be spent because the supervisors may have already decided how it (or a large portion of it) should be spent (as in the case of asbestos abatement or smoke alarms), or there may be other people who will decide how the money is spent (as in the landscaping at Village Hall), or the money may be spent for something that everyone agrees about but the project may be supervised by someone outside of the building in such a way that the outcome is not satisfactory (as in the thermostatic controls) and so on and so forth.

## 6. Discussion

Changing the budget routine was important because it was both a way of bringing about the vision of the associate and assistant directors and a sign that the vision was being enacted. In structuration terms, it was both medium and outcome (Giddens, 1984). Performing the budget routine in this way would create the idea of the organizational structure that the supervisors envisioned. But as Kevin stated above, these performances could not exist independent of how the rest of the organization operated. Performances of the budget routine are simultaneously performances of other routines and other ways that people behave in the organization. Working in cooperative teams, relating to one another as equals and taking on the role of stewards were difficult to do in this particular subroutine of the budget routine when they were at odds with the way work was accomplished in general in the organization. While many different kinds of performances are possible, performances are not entirely independent of one another. People draw on their observations and understandings of other performances as they enact their performances in a specific instance.

The vision that the associate and assistant directors articulated is a vision of an organization that is characterized by cooperation, teamwork and responsibility. For each of the three features of the vision, we have seen that there are performances within the organization that contribute to organizational structures that are at odds with the vision. While many people in the organization would have said, 'this is the way we would like to act around here', few would have said, 'this is the way we do act around here'. The creation of a consensus list in the budget routine was an opportunity to

engage in performances that would contribute to the organization envisioned by the supervisors. For the most part, subordinates and supervisors alike engaged instead in reproducing a different kind of organization, one that was characterized by competition, hierarchy and the lack of a sense of direct responsibility.

Why did they act in these ways? These same people were not averse to change. They had changed performances in other routines they engaged in during the same time period. They were not averse to the values espoused. Indeed, some performances of both supervisors and subordinates did support and contribute to the construction of the vision. Even if we focus narrowly on the part of the budget routine examined here, there were performances that drew upon and contributed to different ways of thinking about the organization. And different groups of people behaved in ways that were more or less supportive of the different sets of values.

To understand this response I have analyzed the way that the participants in the routine made sense of the budget routine and what they were doing in relation to it. Many performances were relevant to the building level managers as they created lists for their supervisors. Table 1 provides a brief summary of the performances that were relevant to the enactment of specific aspects of the understandings about the way work is done in this organization.

The performances relevant to the cooperation–competition part of the vision were both in the budget routine and in other processes for accomplishing work in the organization. The supervisors enacted competition with one another in the budget

**Table 1** Understandings and performances

Understandings about how organization operates	Relevant performances
Cooperative–competitive	Supervisors engage in competitive behavior in budget routine (e.g. horse-trading) Supervisors give lip-service to team-building while dismantling teams
Equal power–hierarchy	The work building-level managers do is hierarchically related Supervisors believe and act as if consensus within teams is not real
Stewardship–no sense of direct responsibility	A variety of actors make decisions about buildings without input from building-level managers. Supervisors withhold big picture information from building-level managers

routine. This suggested to the subordinates that it might not be safe to cooperate with one another, particularly if it meant compromising their units' and their supervisors' interests. These performances within the budget routine were reinforced by the disruption of teamwork relevant to other routines. That these performances supported one another helped to provide legitimacy to the view that cooperation was not something the associate and assistant directors valued enough to act out consistently though it was something they valued enough to talk about.

The performances relevant to the equality–hierarchy part of the vision were not primarily rooted in the budget routine but in the day-to-day operations of the building-level managers. As they performed their roles as building director, facilities manager and food service manager, they produced and reproduced a hierarchy of authority in which the building director had more knowledge, more ability to get things done and, ultimately, more control. It is not surprising, though it was counterproductive, that under these circumstances the associate and assistant directors interpreted consensus as being the voice of the building director. Through communicating this interpretation, they reinforced a hierarchical understanding of the organization rather than the one that they had envisioned.

The performances relevant to the stewardship–lack of direct responsibility feature were similarly rooted outside the budget routine and reinforced by supervisory behavior in the budget routine. Performances of many people within the housing hierarchy and within the university hierarchy who made and executed decisions without input from the building team (or any of the members on it) consistently gave the building-level managers the message that they were not the stewards of their buildings and that they might be punished in some way if they did act as stewards. The withholding of information by the associate and assistant directors reinforced these understandings.

The observation that relevant performances come from outside as well as inside the specific routine in question may be explained, in part, by Sewell's (1992) concepts of the multiplicity and the intersection of structures. The multiplicity of structures refers to the observation that social systems 'are based on practices that derive from many distinct structures' having 'different logics and dynamics' (Sewell, 1992: 16). Organizations, thus, have informal structures, hierarchical authority structures and temporal structures, just to name a few. Each of these structures affects how people perform their work and each has different logics and dynamics. The intersection of structures refers to the observation that 'structures or structural complexes intersect and overlap' (Sewell, 1992: 19). Thus, people can draw from a variety of structures to inform how they perform a specific routine and the same performances can give meaning to a variety of routines or processes for accomplishing work. Our understandings about how an organization operates and how we can or should operate within that organization can similarly be informed by a variety of performances.

That relevant performances may be related to many different routines was not obvious at all to the participants in these routines. When the supervisors thought about what they could do to encourage different behavior among their subordinates, they

focused much more narrowly than the subordinates did. They focused on a set of performances directly related to the behavior they wanted to change. They focused on the forms that their subordinates were filling out and to some extent on the information they were giving their subordinates. They also focused directly on the behavior of the subordinates, exhorting them to meet together and provide them with a consensus list. At the end of the 4 years of observation, they articulated the understanding that the behavior they were trying to change was connected in some fashion to other ways in which the organization operated, but they had not yet started to think about what other performances they needed to change.

The question of what makes performances relevant cannot be entirely answered in the context of this case. As discussed in the introduction, the modalities of signification, domination and legitimation characterize any social structure (Giddens, 1979, 1984). It is clear that they are present in this case. These aspects of structure manifest themselves in interaction through communication, power and sanction. These particular performances had significance because of how they influenced what the subordinates understood about how one operated in this organization. The significance comes, in part, through communication. Communication both between supervisor and subordinates and among subordinates was evident in many of the relevant performances. Communication both draws attention to the performances, thus increasing their significance and also indicates that the performances are seen as sufficiently significant to be talked about. Power was evident in that many of the relevant performances were the performances of supervisors. Power was not all that mattered, however, as many performances of these supervisors were not considered relevant. Finally, the relevant performances were legitimized in the sense that they carried the potential for sanction. The performances were normative. Performing in a manner consistent with them seemed likely to draw approval; not performing in a manner consistent with them seemed likely to draw disapproval.

The relevant performances reproduced the organization that *was* rather than producing the organization that *could be*. The recursive relationship between the understandings about how an organization operates and performances within the organization help us to understand this outcome. The analysis presented here shows how performances in a small part of the budget routine were related to performances in the broader budget routine and to performances entirely outside of the budget routine because together they constitute and represent the understandings about how the organization operates.

## **7. Conclusion: thinking about change in organizational routines**

The recursive relationship between performances of organizational routines and understandings about how the organization operates can help us understand more about both change and inertia in organizational routines. Change occurs as

organizational participants alter their performances. March (1981: 575) has pointed out that ‘The conventional, routine activities that produce most organizational change require ordinary people to do ordinary things in a competent way’. From this perspective change is continuous (Weick and Quinn, 1999; Feldman, 2000). Such change often takes place unintentionally as people go about doing their work (March, 1981; Orlikowski, 1996; Feldman, 2000). This unintended change may not be problematic and may even go unnoticed.

When we are talking about organizational change, however, we are often talking about intended or mandated change. Here, though the dynamics may be the same, the outcome may be very different. Just because change is continuous and relatively unproblematic in many instances, does not mean that a specific desired change will be easy to bring about. As the case here illustrates, a specific desired change might require performances that are inconsistent with the understandings about how the organization operates and with the performances that create and maintain these understandings. Under these circumstances, the perspective presented in this paper suggests that the change is unlikely to occur.

Organizational routines are traditionally portrayed as difficult to change. The perspective presented here modifies that view. I suggest that it is difficult to bring about change in organizational routines when the change is inconsistent with broader understandings about how the organization operates as these understandings are produced and reproduced by other performances in the organization. The case of the budget routine suggests that change encounters difficulties not because it is a routine but because and to the extent that it requires actions inconsistent with the understandings about how the organization operates that have been and continue to be enacted through a variety of performances.

This perspective, thus, draws attention to the difference between intended and unintended change. As Feldman and Pentland (2003) point out, routines consist of both the idea of the routine and the performance of it. Unintended change starts with a change in performances. These performances—or in March’s words—‘ordinary people doing ordinary things in a competent way’ under certain circumstances bring about change in the idea of the routine and, thus change in the routine as a whole (Feldman and Pentland, 2003). When new performances do not bring about change in the idea of the routine, then the fact that change in the routine as a whole did not occur may not be noticed. When managers or others intend to change a routine, however, they produce a new way to conceptualize it, but the routine as a whole may not change because the idea is not consistent with performances that need to be different in order to bring about the intended change. By stating the intention to change, however, the attention of the managers and others is drawn to whether or not the routine as a whole changed. The analysis here suggests that such intended changes will often be quite difficult to bring about. This suggests that the difficulty of bringing about *intended* changes may be a large source of the reputation organizational routines have of being inertial and resistant to change.

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