

# THE HEART OF INSTITUTIONS: EMOTIONAL COMPETENCE AND INSTITUTIONAL ACTORHOOD

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We develop the concept of emotional competence, which refers to the ability to experience and display emotions that are deemed appropriate for an actor role in an institutional order. Emotional competence reveals a more expansive view of emotions in institutional theory, where emotions are central to the constitution of people as competent actors and lend reality and passionate identification to institutions. We distinguish two facets of emotional competence—private, which is needed to engage in self-regulation, and public, which is needed to elicit other-authorization—and two criteria for assessing emotional competence—the deemed naturalness and authenticity of emotions within an institutional order. These distinctions delineate four processes through which emotional competence ties personal experience and social performance to fundamental institutional ideals, the institution's ethos. We discuss theoretical and methodological implications of this model for researching institutional processes.

Emotions are central to human experience, and scholars have increasingly recognized their role in institutions. In recent work researchers have cast emotions as animators of institutional processes—the drivers of institutional work (Voronov & Vince, 2012) and legitimacy judgments (Haack, Pfarrer, & Scherer, 2014) and the forces behind the emergence of fields (Grodal & Granqvist, 2014) and institutional control and resistance (Creed, Dejorjy, & Lok, 2010; Dejorjy & Barrett, 2014; Hallett, 2010). Yet emotions are arguably even more foundational to institutions than their motivational power indicates. They are also a way through which people experience institutions as real and personally meaningful and a way they can connect institutions to their sense of self (Creed, Hudson, Okhuysen, & Smith-Crowe, 2014). In short, emotions are central to the very constitution of people as competent *institutional actors* who hold a personal stake in an institution and are enabled to interpret and

perform their own role within an institutional order<sup>1</sup> (e.g., Jackson, 2010; Meyer, 2010; Meyer & Jepperson, 2000).

The concept of actorhood is prominent in institutional theory and has its roots in Max Weber's interpretive sociology of social action (e.g., Jackson, 2010; Meyer, 2010; Meyer & Jepperson, 2000). It emphasizes that people, and by extension organizations and states, are imbued with agentic capacities that are constituted within an institutional order. The concept of institutional actorhood thus holds that people are socialized by institutions, but also have a self<sup>2</sup> with capacities for self-reflection and purposeful action. In

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<sup>1</sup> An institutional order is a shared meaning system that typifies "one's own and others' performances, such that there will be the recognition not only of a particular actor performing an action of type X, but of type-X action as being performable by any actor to whom the relevance structure in question can be plausibly imputed" (Berger & Luckmann, 1966: 72). Used extensively in institutional theory (e.g., Barley & Tolbert, 1997; Creed et al., 2014; Friedland & Alford, 1991; Suchman, 1995), the term emphasizes that institutions establish norms and beliefs and also constitute social orders, inequalities, and systems of power and domination.

<sup>2</sup> In sociological theories the concept of the self emphasizes that human beings are objects to themselves—that they have a reflective capacity to perceive and interpret themselves and to communicate with and act to shape themselves, and that selves are realized through the performance of social roles (e.g., Mead, 1934).

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neoinstitutional theory the concept of actorhood has often been reduced to its effect on institutions, a capacity to “get things done” that reduces the people that “inhabit” institutions to relatively mechanical parts of broader processes (Hallett, 2010; Hallett & Ventresca, 2006). This simplified conception of actorhood sets aside questions of how institutions regulate institutional actors’ actions and why people become invested in institutional orders. A fuller notion of institutional actorhood begins with unpacking how institutions penetrate people’s experience of the world and their selves as real, immediate, and meaningful (Berger & Luckmann, 1966; Husserl, 1962/1913; Schutz, 1967/1932; Schutz & Luckmann, 1974). Emotions are central to lived experience and the self and, hence, to action formation and an expanded understanding of actorhood (Barbalet, 2001; Weber & Glynn, 2006).

A stratified system of actor roles<sup>3</sup> is inherent in institutional orders. It is through performing these ascribed actor roles that people come to understand and sustain their social selves (Alvesson & Willmott, 2002; James, 1890). Fusing the emotions of lived experience with institutional roles is key to being authorized as a competent institutional actor. This role of emotions in the “lived” access to institutions thus goes beyond shared feeling and solidarity. Rather, it rests on the idea that people construe and realize an authorized social self through emotional practice. Emotions are then intimately tied to disciplinary power, because it is through emotive processes of the self that institutions “teach” people to not only adapt to but care for and desire (Creed et al., 2014; Stavrakakis, 2008; Thornborrow & Brown, 2009) fundamental institutional ideals—an institution’s *ethos*. We theorize that passionate attachment to institutional ethos enables people to transform into actors who, in order to sustain their self, think and act but also feel according to their position within an institutional order. Toward this goal, we develop the concept of “emotional competence” (EC) as the ability to experience and display emotions that are deemed appropriate for an actor role within the institutional order. EC authorizes actorhood at the

level of personal lived experience by enabling people to regulate their private emotional experiences in accordance with institutional ideals and to elicit authorization from others through appropriate emotional displays.

The article makes the following contributions. First, we advance a view of emotion as integral to institutional processes. Rather than conceiving of emotions as conceptually autonomous prompts of institutional work (e.g., Voronov & Vince, 2012), we conceptualize them as institutionally conditioned and, thus, endogenous to institutional orders. We elaborate this view by showing how EC enables people to take up institutionally prescribed roles in a competent manner. The concept of EC within institutional analysis may appear similar to the notion of emotional intelligence, which refers to “an ability to recognize the meanings of emotions and their relationships, and to reason and problem-solve on the basis of them” (Mayer, Caruso, & Salovey, 1999: 267). However, unlike emotional intelligence, EC is not a person’s universally adaptive capability for interacting with others (Cherniss, 2010; Ybarra, Kross, & Sanchez-Burks, 2014) but, rather, is intrinsically tied to the specific actor roles within a particular institutional order that may be occupied by “generic” people (Berger & Luckmann, 1966), as well as tied to social categories, such as gender, race, and social class, that often overlap with these roles (Reay, 2004). Whereas emotional intelligence facilitates agency in social interactions, EC describes a capacity to belong to and inhabit an institutional order. As we discuss below, EC underlies processes of both self-regulation and other-authorization and, thus, disciplines the social behavior of the inhabitants of institutional orders.

Second, we unpack the distinctive and ongoing processes through which actorhood is accomplished. Actorhood requires personal self-regulation and external authorization of these efforts as institutionally appropriate, but what are the enabling conditions for these processes? We establish EC as the institutional motivator and enabler of self-regulation and authorization, and institutional ethos as the basis of competence. We also identify the key criteria used in competence appraisals. The expanded conceptual vocabulary and relationships developed in our model open up new directions for research on institutional stability and change.

Finally, we advance a phenomenological understanding of how people experience institutions in which emotions are central (Creed et al.,

<sup>3</sup> We use “actor role” to refer to positions within an institutional order (see, for example, Berger & Luckmann, 1966, and Weber & Glynn, 2006) because it makes clear that roles are part of an institution and serve an institutional purpose (Burke & Reitzes, 1981). Other authors have used the related concepts of “actor positions” and “social categories” or “identities.”

2014; Gill, 2014; Suddaby, 2010). The core concern of this perspective is the production of a self through the performance of institutional roles, which makes institutions personally meaningful and is therefore the precondition for various forms of institutional engagement (e.g., maintaining, transforming). Institutions are subjectively meaningful because ratification of humans' selves depends on the successful performance of social roles; hence, the fear of deauthorization of actorhood and the desire to craft valid selves through competent role performance are important drivers of human conduct. We advance this perspective by explicating the emotive processes through which competent actorhood is constituted. Our conceptualization of actorhood brings society and personal biography closer together in order to understand how human experience and effort are disciplined and recruited in the pursuit of institutional goals.

The remainder of the article is organized as follows. First, we clarify the importance of problematizing actorhood in institutional theory and articulate our perspective on emotions, emphasizing their relational properties as central to fusing a person with an institutional order via the authorization of competent actorhood. We then introduce the key conceptual building blocks of the EC model of actorhood—institutional ethos and private and public forms of EC—and two criteria for assessing EC—naturalness and authenticity. These concepts enable us to distinguish and theorize the processes that fuse people's emotional experiences and displays with the institutional ethos, thereby transforming them into competent actors.

## EMOTIONS AND INSTITUTIONAL ACTORHOOD

Recent institutional scholarship has brought people, as actors and performers, into the foreground of neoinstitutional analysis (e.g., Lawrence, Leca, & Zilber, 2013; Lawrence & Suddaby, 2006). For example, researchers have emphasized the effortful nature of institutional creation, maintenance, and change, and thus have implied that people develop a motivational stake in institutions (Lawrence, Suddaby, & Leca, 2009). Recent contributions have focused on emotions as motivators of either upholding or transforming institutional arrangements (e.g., Creed et al., 2010; Gutierrez, Howard-Grenville, & Scully, 2010; Voronov & Vince, 2012); however, emotions play an even more encompassing role in institutional processes. In

explaining institutional persistence, Jarzabkowski, Matthiesen, and Van de Ven suggest that "actors instantiate, reproduce, and modify institutionalized practices through habit, tacit knowledge, culture, routines, motivations and emotions" (2009: 289).

We argue that emotions also play a special role in authorizing people to inhabit institutionally prescribed actor roles because of emotions' unique part in rendering subjective experience meaningful and animating desire. Integrating emotions and institutions in this fashion elucidates how some people develop passionate attachments to institutions, whereas others may experience equally passionate dislike. Fusing people's selves with actor roles through subjective experience forms the capacity for institutional actorhood.

## Unpacking Actorhood in Institutions

Although the word "actor" is used routinely in institutional theory as shorthand for people, organizations, or even nation-states, it needs to be thought of in terms of intersubjective accomplishment rather than as an abbreviated way to designate participants in institutional processes. Unpacking the nature of this intersubjective accomplishment leads to a fuller understanding of the emotional underpinnings of institutions. The importance of lived experience—a person's private experiences and intersubjective engagements with others for understanding institutional action—was recognized by Max Weber, whose concept of *Verstehen* as the foundation of a theory of action was elaborated on by sociological phenomenologists and ethnomethodologists (e.g., Berger & Luckmann, 1966; Garfinkel, 1967; Schütz, 1967/1932).

Actorhood results from fusing people's sense of self with the demands of the place or role they occupy in an institutional order so that each person experiences and expresses emotion in institutionally appropriate ways and, thus, inhabits an institutional order. Actorhood therefore results from the disciplining power of institutions (Cooper, Ezzamel, & Willmott, 2008; Lawrence, 2008), whereby people come to understand "themselves as discrete and autonomous individuals" (Knights & Willmott, 1989: 538) and where that sense of self is conditioned and sustained through participation in social practices that are institutionally appropriate for their roles. For example, managers come to see themselves as "strategists" through their participation in activities that are institutionally

conditioned to be “strategic” (Dameron & Torset, 2014), and independent professionals come to see themselves as “business entrepreneurs” through participation in management-by-objectives activities (Covaleski, Dirsmith, Heian, & Samuel, 1998).

The above suggests that actors are not simply abstract entities but distinct intersubjective formations that result from institutional orders demanding particular kinds of actors to enact the norms of institutional roles. There is an apparent divide between a person’s immediate lived experience, in which emotions reside, and the more abstract institutional categories and prescriptions associated with the actor role the person is supposed to occupy. The question then is how the impersonal nature of institutions relates to personal emotional experience.

### Authorizing People to Inhabit Actor Roles with Emotions

Several recent studies have pointed to the need to integrate emotions more systematically in institutional processes. Creed et al. (2014), for example, explored how shame disciplines human behavior by leading people to internalize institutional prescriptions and norms, while Dacin, Munir, and Tracey (2010) reported how formal dining rituals at the Universities of Cambridge and Oxford reproduce, legitimize, and normalize social stratification. Crucially, these rituals establish a *feeling* of solidarity and a *desire* among both elite and nonelite participants to maintain the integrity of the ritual and, by extension, the social distinctions enshrined in it. Conversely, mobilization for institutional change may equally be motivated by emotions linked to the expression of social identities that are part of an institutional order (Emirbayer & Goldberg, 2005). For example, Weber, Heinze, and DeSoucey (2008: 543) found that pioneers of grass-fed beef farming “obtained emotional energy from connecting their work to a sense of self and moral values,” cast in contrast to other actor types within the institutional system of agriculture.

Thus, the role of emotions in institutional processes is more fundamental than just motivating either stability or change (cf. Voronov & Vince, 2012). Rather, we need to theorize the role of emotions in fusing—on an ongoing basis—personal experience and institution, regulating the person’s self vis-à-vis the institutional order he or she inhabits. This process consists of two

components. The first is self-regulation—“a person’s keen policing and channeling of his or her behavior based on vigilant, ongoing intersubjective surveillance” (Creed et al., 2014: 280)—which facilitates the person’s ongoing experience of his/herself as a competent institutional actor. The second is other-authorization, which enables others to deem the person a competent institutional actor. To theorize these processes, we develop a selective view of emotions, attending only to aspects of emotion that are relevant for institutional scholarship and specifically for the competence with which persons fill out institutionally defined actor roles.

### Conceptualizing Emotions Within Institutional Analysis

The concept of emotion has often proved difficult and eludes simple definitions (Elfenbein, 2007), in part because contributions to the study of emotions have been made by scholars in such disparate fields as sociology, psychology, economics, neurobiology, and philosophy. In each field the concept of emotion is embedded in a different nexus of questions and adjacent theories that have shaped the aspects and dimensions of emotions that are most relevant. For example, the expansive and sophisticated social psychological tradition of research on emotions emphasizes the delineation of distinctive universal emotions (Goody, Gavin, & Ashkanasy, 2009) and processes of cognitive appraisal (Ellsworth & Scherer, 2003; Smith & Ellsworth, 1985). In this vein, Elfenbein summarized the emotion process as beginning “with intrapersonal processes when a focal individual is exposed to an eliciting stimulus, registers the stimulus for its meaning, and experiences a feeling state and physiological changes” (2007: 317).

In contrast, institutional scholars are predominantly interested in the relationship between emotions and institutional norms and actor roles (Voronov, 2014; Voronov & Yorks, 2015). Berger and Luckmann, for example, placed actor-specific norms at the center of an institutional perspective when they stated that “institutionalization occurs whenever there is a typification of habitualized actions by types of actors” (1966: 54). The emphasis on typification processes has been echoed in recent arguments that institutions should be seen as relational and understood in terms of typifications of actors, situations, and

behaviors (Smets & Jarzabkowski, 2013; Weber & Glynn, 2006). Thus, for the purpose of integrating emotions into institutional analysis, we are especially interested in the relational and collective aspects of emotion (Emirbayer & Goldberg, 2005; Thoits, 2004) because those are most compatible with institutional scholars' concerns. According to Gould, "An emotion is one's personal expression of what one is feeling in a given moment, an expression that is *structured by social convention, by culture*" (2009: 20, emphasis added). We concur that emotions are inherently social and that society helps a person transform raw affect<sup>4</sup> into what can be appraised, labeled, and expressed through words and gestures (Friedland, Mohr, Roose, & Gardinali, 2014; Kemper, 1978; von Scheve, 2012).

Emotions are, in this sense, institutionally conditioned and have important intersubjective components (Barbalet, 2001; Fields, Copp, & Kleinman, 2007). Emotions not only affect people's engagement with institutions but also are closely linked to the structuring and disciplining force of institutional orders (Creed et al., 2014; Moon, 2013; Shott, 1979). They are central to people's ability to locate themselves within society. Tendencies to feel and exhibit certain emotions under particular circumstances are linked to important social distinctions, such as class and gender (Nixon, 2009; Reay, 2004). The need to manage and experience both private emotions and emotional displays in a manner that is valued by institutional referents endows some people and groups with more privileges than others. For example, Creed et al. (2014) explain that, from an institutional perspective, shame is not simply an intrapersonal emotion but, rather, serves a disciplinary function by subtly facilitating conformity to institutional norms by enabling people to internalize them.

In sum, from an institutional perspective, emotions do not belong to or reside within isolated "individuals" but, instead, exist in the interactions that are structured by institutional orders (Emirbayer, 1997; Emirbayer & Goldberg, 2005). Accordingly, the concept of EC, as developed below, differs from related constructs such as emotional intelligence that focus on relationships between persons instead of institutional categories.

We now introduce the key concepts that we will use to theorize about the role of emotions in transforming people into competent institutional actors.

## KEY CONCEPTS

The framework of EC in the accomplishment of actorhood starts with ethos, which refers to the fundamental institutional ideals that lend moral authority to the institutional order and exert disciplinary power over participants. We then introduce EC in its private and public facets. EC explains how and why people engage in ongoing self-regulation and perform and elicit other-authorization as competent institutional actors. We then introduce the two dimensions used by those participating in an institutional order to assess EC: naturalness (whether emotions are appropriate for a category of actors) and authenticity (whether emotions are genuine).

### Ethos

Institutional theorists have relied implicitly on the assumption that the connection between people and institutional order is cognitive or habitual in nature (Voronov & Vince, 2012) and have been slow to incorporate the idea that "institutions depend, both in their formation and their core, on a passionate identification" (Friedland, 2013: 593). The object of the passionate identification is not an institution in some abstract sense or its constitutive cognitive schemas. Rather, it is what we call the institution's "ethos," which defines an institutional order in terms of its principles of moral and aesthetic worth. According to Geertz, "A people's ethos is the tone, character, and quality of their life, its moral and aesthetic style and mood; it is the underlying attitude toward themselves and their world that life reflects" (1957: 421). Ethos has two essential components: (1) it draws and captures emotional energy—often subconsciously—and (2) it provides a moral justification for this investment of emotional energy. Ethos may be seen as the disciplinary dimension of institutions because it endows institutional arrangements with personally relevant meaning and allows people to derive their sense of self from their participation in the institutional order (Ashforth & Vaidyanath, 2002; Brown, 1997; McAdam & Fligstein, 2012).

George Lakoff (2010) offers two vivid illustrations of what we mean by ethos. One illustration is

<sup>4</sup> Affect is the raw, unconscious, and unmediated bodily registering of energy and intensity that arise in response to various stimuli.

the conservative ethos, which he argues is represented by the "strict father" metaphor. It emphasizes strict rule setting and following, self-reliance, and fending off external threats in a world that is inherently dangerous. The contrasting example is the liberal ethos, as represented by the "nurturing parent" metaphor. It emphasizes care, empathy, nurturing, and empowerment to explore the world, enabling people to fulfill their potential. Key to both of these is the assignment of different moral priorities (e.g., safety and obedience versus self-realization) that are intertwined with particular valued emotions (e.g., fear versus compassion) and justifying the structuring of hierarchy in an institutional order (e.g., top down versus flat). Neither is objectively and verifiably "true" or "false," but each is personally real to its adherents (see also Ashforth & Vaidyanath, 2002, and Haidt, 2012).

In essence, ethos is the shared fantasy (Žižek, 1999) or idealized representation of what it means to be a participant in a particular institutional order, and it prescribes particular kinds of aspirations, ideals, values, and moral judgments (Brown, Ainsworth, & Grant, 2012; Green, 2004; Haidt, 2001; Rai & Fiske, 2011; Wright & Zammuto, 2013). This is not to imply that the ethos is somehow distorted or false. Rather, it cannot be objectively falsified or confirmed (Ashforth & Vaidyanath, 2002; Myers, 2003) but operates at a largely preconscious level and cannot be fully rationalized. It has undertones of sacredness (de Rivera, 2014; Friedland, 2002) and is akin to a religious faith (Ashforth & Vaidyanath, 2002), whereby it offers institutional order participants "the opportunity to share in the means by which their self-esteem may be continuously recreated and sustained in ways that make it motivationally compelling" (Brown, 1997: 664) to partake in the institutional order (Barbalet, 2001; Kintz, 1997; Thompson & Willmott, 2016). Voronov and Vince (2012) refer to this as a "fantasmic frame." However, whereas they focus on investment in a fantasmic frame as a predictor of support for the institutional status quo or a lack of investment as a predictor of institutional disruption, we see ethos as playing a more pervasive role in institutional processes. Ethos disciplines subjective experience and evaluations of social worth in such a way that people are led to aspire to be competent, devoted actors with a place in an institutional order (Brown, 1997; Thornborrow & Brown, 2009). For example, Scheff (1995) argued

that academics belong to clans and gangs and derive emotional rewards from this sense of belonging; he further demonstrated that this dogged loyalty is not explained by simple acceptance and comprehension of institutional norms. Rather, clans provide highly desirable fantasmic images that are rewards in themselves and provide the aspiration for the institutional actorhood of academics.

Relating ethos to prior institutional scholarship, we suggest that the concept is complementary to institutional logics but more central to understanding lived experience and the emotional dynamics of institutions.<sup>5</sup> Logics prescribe norms and beliefs (what should be done), whereas ethos prescribes the moral and transcendent ideals for why these norms are desirable. Ethos therefore captures the "spirit" or "character" of an institutional order that people can collectively identify with and derive a sense of self-worth from (Boltanski & Chiapello, 2005/1999; de Rivera, 2014; Weber, 1958/1904), even as they take on different actor roles (Dacin et al., 2010; Xu, 2013). Ethos may be differentiated and reside at different levels of a complex society's institutional system, but it can also integrate multiple logics that are segregated in different social domains or hybridized in everyday life (e.g., Battilana & Dorado, 2010; Goodrick & Reay, 2011). Hence, the "spirits of capitalism" described in the works of Weber (1958/1904) and Boltanski and Chiapello (2005/1999) are examples of ethos that permeates the logics of the market as well as that of the family, profession, or the corporation, while others have evoked unifying identifications in hybrid organizations (Battilana & Dorado, 2010) and professions (Goodrick & Reay, 2011). The ethos dictates whether and how the logics can coexist.

Thus, contestation within or across institutional orders is not limited to conflict over the practices and structural arrangements typically studied by institutional scholars (Greenwood et al., 2011; Rao, Monin, & Durand, 2003). It may also encompass the ethos of the institutional order. Such contestation is apparent, for example, in the so-called culture wars that characterize many societies vis-à-vis a number of social issues, such as gay rights, reproductive rights, and the place of

<sup>5</sup> Institutional logics are "overarching sets of principles that . . . provide guidelines on how to interpret and function in social situations" (Greenwood, Raynard, Kodeih, Micelotta, & Lounsbury, 2011: 318).

religion in public life (Kintz, 1997; Stein, 2001). These contests often seem intractable precisely because the contesting groups' respective ethos permeates participants' subjectivities in a manner that makes logical fallacies and incoherencies imperceptible to them and, hence, discursive deliberation difficult (Haidt, 2012; Lakoff, 2010).

Our focus, however, is not on how ethos is contested or altered but, rather, on how ethos dictates how a person is authorized as an institutional actor. A person routinely navigates a variety of life spheres, such as work and family. Each life sphere is governed by an ethos and typically includes specific actor roles (e.g., manager or frontline employee at work; mother or father in the family), and a person must be authorized as an institutional actor in each life sphere. Institutional ethos is usually internalized in an unobtrusive manner so that the person is typically unaware of how his or her thoughts, feelings, and behaviors are shaped by the ethos.

## EC

Attachment to an internalized ethos leads people to seek validation as actors in institutional processes and so affirm their self and their belonging to an institutional order. People appraise the naturalness and authenticity of their own and others' emotions with reference to an institutional ethos. To establish themselves as competent actors, they engage in emotional self-regulation and seek to display emotions that elicit their authorization by other participants in the same institutional order. EC describes the ability to experience and display emotions that are deemed appropriate for an actor role in light of the institutional ethos—in other words, the ability to experience emotions needed for self-regulation and to display emotions needed to elicit authorization from others. The notion of EC acknowledges that some emotions are more valued than others in a particular institutional order's ethos and that these emotions are stratified by actor roles (e.g., pride in one and shame in another).

To illustrate, let us consider what role emotions might play in being authorized as a competent academic. Conventional wisdom is that emotions are outcomes or by-products of actions and cognition (e.g., successful academics feel pride and satisfaction, whereas unsuccessful ones feel shame and frustration). However, researchers'

"private" emotional experiences are also important to their standing, and professional socialization involves helping aspiring academics learn appropriate aspirations and desires: be passionate about learning, competitive, driven, and sometimes aggressive with regard to career management; voice criticism of others who fail to live up to academic ideals; yet be resilient and thick-skinned in the face of rejection and harsh criticism. In other words, one needs the right emotional experiences to play one's role in an institutional order, experience it as meaningful, and develop capacities for learning and self-fashioning.

One must also *display* emotions appropriately; in some academic contexts that means writing and speaking excitedly, managing interpersonal relationships amicably without displaying negative emotions, and understanding which situations call for displays of humility or confidence, thereby ensuring that one's actions resonate well with others' expectations of the role one plays. Thus, both private emotional experiences and public emotional displays are vital to fashioning ourselves into the kind of actors that the ethos of academia demands and inspires us to be.

Our use of EC differs from that in micro-organizational research, where the term describes individual-level constructs—specifically, self-awareness and other-awareness and a set of skills associated with regulating the self and others (Boyatzis, 1982, 2008; Cherniss, 2010). Within an institutional actorhood framework, however, EC is not foremost about how some actors might be "better" at getting things done but, rather, is based on a more fundamental concern with belonging within an institutional order. People tend to derive their sense of self from belonging to institutional orders and being authorized actors in their performance of particular roles (Brown, 1997; James, 1890). It is because of this dependence on institutional roles that people discipline themselves to experience the world in line with institutional ethos.

## Locus of EC Performance: Private and Public

Emotions can make intrasubjective and intersubjective contributions to authorizing a person as a particular institutional actor. Accordingly, EC may manifest in two forms—private and public—paralleling Weber and Dacin's (2011) classification of cultural research. The intersubjective

contribution is public EC, in that people are recognized by others as competent actors by virtue of proper emotional displays, as described in research on emotional labor (e.g., Hochschild, 1983). Public EC also includes not showing emotions in situations deemed to require emotional restraint (e.g., Diefendorff & Greguras, 2009). Actions can seem fluid and professional *precisely because of* their ostensible emotional detachment (Grandey, 2000)—for example, the restraint of a funeral director (Cahill, 1999), the individualistic detachment of an engineer (e.g., Fletcher, 1999; Kunda, 1992), or a physician's sympathetic yet cool demeanor (Smith & Kleinman, 1989). Thus, public EC elicits processes of other-authorization, the affirmation or denial of actorhood by external audiences.

The intrasubjective but equally important facet of actor authorization is private EC, whereby people's private emotional experiences enable them to be particular institutional actors (Gray & Kish-Gephart, 2013; Nixon, 2009; Widick, 2003; Žižek, 1999). When accomplished, private EC enables people to experience the self in an institutionally appropriate manner and desire to be the actor that the ethos dictates. Private EC is not merely instrumental for producing emotional displays that elicit authorization by contemporary others but is also instrumental for feeling subjectively at home in an institutional role—to inhabit institutional orders comfortably. Private EC elicits processes of self-regulation, the appraisal and management of emotions by the focal person. The private locus of this facet of EC makes the institutional origins of these desires mostly invisible, and they can be misconstrued as individual differences or personality traits of the person trying to occupy an institutional position. For example, in Kellogg's (2011) study of surgical interns, the overt behavior of the surgical interns who aspire to the "superman" role prescribed by the institutional ethos of surgery is tied to how they experience their work emotionally. They must have the "right" emotional reactions, motivations, or drives, and they must care and be passionate about the "right" things. Surgical interns who are emotionally more competent will better perform the institutionally accepted role of surgeon, independent of the impression their displays make on others.

Emotional appraisal takes on the form of internal conversation (Archer, 2003; Wiley, 1992), typically with a generalized or idealized other who represents institutional ethos (Myers, 2003; Turner, 2007). This other has been internalized and

sedimented into the sense of self over the course of inhabiting an institutional order and interacting with other inhabitants (Creed et al., 2014; Thornborrow & Brown, 2009). Thus, the idealized institutional other enables people to regulate their sense of self as a competent institutional actor.

Although analytically distinct, the public and private facets are closely linked. It is, for example, difficult to develop public EC without having sufficient private EC to desire it. And various aspects of a person's social biography that rely on public processes, such as childhood socialization and educational experiences (Calarco, 2014; Fraher & Gabriel, 2014), either increase or decrease the likelihood of developing private EC that is compatible with an institutional order.

### Criteria of EC: Naturalness and Authenticity

Private and public EC processes require criteria on which emotions can be appraised as corresponding to ethos. At a general level, emotional experiences and displays are deemed appropriate when they are assessed as natural and authentic for an occupant of an institutional actor role. The criterion of the naturalness of emotions vis-à-vis institutional ethos pertains to the consonance between a person's emotions and typified expectations for the actor position that the person occupies in an institutional order. Each type or category of actor in an institutional order is associated with certain emotions that are deemed natural for its occupants in light of the institutional order's ethos. Naturalized emotions make intuitive sense; they require no justifications or deliberations and are difficult to critique (Douglas, 1970). The designation of naturalness, however, is also a political act that normalizes some forms of emotional experiences as self-evident within an institutional ethos and others as problematic, deviant, or difficult to account for (Fineman, 2006; Fletcher, 1999; Mumby & Putnam, 1992; Vince & Mazon, 2014).<sup>6</sup>

In the extreme, "natural" emotions might no longer be seen as emotions, especially in highly

<sup>6</sup> The criterion of naturalness is similar to the notion of normalization in Foucault's (1995/1975) account of disciplinary power, in that a constructed ideal of social conduct is used to distinguish between normality and deviance. We use "naturalness" because it is more common in new institutional theory and emphasizes the ideal of a broad institutional ethos over the more bodily practices and social conventions central to Foucault.



rationalized institutional orders. For example, Barbalet (2001) argued that, contrary to lay assumptions of rationality, the capitalist economy is actually grounded in emotions. Rather than all emotions being construed as incompatible with capitalist rationality, only those emotions that distract from the pursuit of market interests are deemed unnatural and inadmissible. They are cast as irrational since detached rationality is central to the ethos of capitalist institutions. Thus, emotions oriented toward the possession of commodities (e.g., greed) support instrumental rationality in markets and are therefore seen as natural and often not even recognized as emotions but as a rational pursuit of self-interest by competent actors. In other institutional domains, such as the family, emotions oriented toward people (e.g., love, attachment) are deemed more natural (Friedland et al., 2014). This argument is extended by Kintz (1997), who proposed that the ethos of the "free market" is linked to the ethos of Christianity such that emotional investment in both offers reciprocal support and obscures incongruences, thereby producing a putatively natural alignment.

Thus, institutional ethos naturalizes emotions that are most supportive of the institutional order. Emotions that are inconsistent with the ethos tend to be cast as problematic, deviant, irrelevant, or detrimental to the moral foundation of the institutional order. When they do occur, these emotions are repressed or eliminated through public and private emotion management (Ashforth & Kreiner, 2002), as is illustrated in Fletcher's (1999: 103) study of "disappearing acts" in an engineering firm, where relational practices and the emotions enabling these practices "get disappeared" and excluded from actor roles as "something other than work." Emotions that underlie these relational practices, such as empathy, care, and compassion, are deemed either illegitimate (i.e., excluded as possible public EC) or abnormal or embarrassing (i.e., excluded as possible private EC). These emotions are devalued because they are inconsistent with the typically masculine institutional ethos of engineering work. The criterion of naturalness thus sets a standard for how competent actors should feel, and unnatural emotions make role occupants perceive themselves and others as incompetent actors.

The second criterion for appraising emotional experiences and expressions vis-à-vis institutional ethos is authenticity. Authenticity has been defined as "the loyalty of one's self to its own past,

heritage and ethos" (Heidegger, 1962: 117). In other words, authenticity is about the fidelity of the self to institutional ethos, a relationship mediated by actor roles. The criterion for evaluating emotions as authentic is the extent to which a person experiencing or displaying them appears to have genuinely internalized and become one with institutional ethos so that his or her emotions are seen as sincere. Sincerity implies the perceived absence of external force and strategic manipulation of emotions: authentic emotions are voluntary, noninstrumental, and sincere. Sincerity indicates a complete fusion of a person's sense of self with institutional roles and the corresponding ethos. At the extreme, a person's self is fully absorbed by an actor role, at least temporarily. Emotional experiences that enable participants in an institutional order to feel authentic constitute private EC, and emotional displays that resonate with audiences as authentic constitute public EC.

Authenticity is different from a judgment about whether emotions are natural or unnatural to an actor role—that is, a judgment about expectations and appropriateness. It is about whether emotions are deemed genuine or fake—an appraisal about the sincerity and genuineness of experience and social performance in relation to the actor role and its ethos.<sup>7</sup> One can "go through the motions" of a normal emotion but not feel or appear "true to it" (Alexander, 2004). Conversely, one can be deemed very genuine but experience or display emotions that do not correspond to a typified institutional actor role. Authenticity is therefore an especially important criterion when actor roles are only vaguely specified and what is normal is thus unclear.

Authenticity is appraised through a variety of discursive and dramaturgical practices—be they private or public—that offer heuristics as to the absence of manipulation (Alexander, 2004; Glynn & Lounsbury, 2005; Goffman, 1959). The supposed absence of force or constraint is ideological in that ethos still dictates what is or is not authentic and people still benefit from appearing (Alexander,

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<sup>7</sup> The concept of authenticity has also been used to describe being especially pure or true to a social category, what Carroll and Wheaton (2009) call "type authenticity," in contrast to "moral authenticity" or being true to one's self. Since in our framework possible selves are connected to institutional roles, we reserve authenticity for "moral authenticity," with naturalness corresponding partially to type authenticity.

2010) and feeling (Grandey, 2003) authentic. For example, in Martin, Knopoff, and Beckman’s (1998) study of The Body Shop (a company priding itself on embracing emotions), personal disclosure that putatively revealed “the real person” became a tool of political contestation within the company and undermined self-assessments and other-assessments of emotional authenticity.

**THE EMOTIONAL AUTHORIZING OF ACTORHOOD**

We now turn to EC in action. The argument we outline below is that the transformation of a person into a competent institutional actor involves both emotional self-regulation by the person vis-à-vis institutional ethos and emotional other-authorization such that a person’s emotional displays are validated by audiences. Private EC prompts and enables self-regulation, and public EC leads to and enables other-authorization. Self-regulation and other-authorization are evaluated via naturalness and authenticity, thereby giving rise to four distinct processes through which EC facilitates actorhood. We first explain the processes through which EC facilitates self-regulation—acquiescence and devotion—and then discuss the processes that facilitate eliciting other-authorization—proficiency and personification. Figure 1 summarizes the processes.

We describe these processes as analytic ideal types. The focus of our theorizing is to establish four elementary processes to highlight the multifaceted nature of EC, but it is important to note that

these processes may be closely interrelated in concrete settings. For example, the effect of other-authorization may rest on a (private) self-regulatory capacity to mold the self according to institutional ethos and actor roles. And self-regulation processes rest on earlier socialization processes through which other-authorization is internalized and private EC is decoupled from contemporary social feedback. We also believe that in strong institutional orders all four processes must be present at the aggregate level, although particular processes may be more important for different people, actor roles, and institutional processes. We address these differences in the Discussion section.

**Processes of Self-Regulation and Other-Authorization**

For a person to become a competent institutional actor, he or she must privately seek to adapt to the ethos that is the object of identification, thereby engaging in self-regulation, and an institutional public must offer cues and responses that mold the person into the expected kind of actor—that is, the person gets authorized as an actor by others. Self-regulatory processes, relying on private EC, depend on the internalization of institutional ethos so that emotional regulation occurs through inner conversations and the appraisal and disciplining of experienced emotions. A central process of internalization is the socialization of newcomers into an institutional order. Ritual practice is one form of socialization through

**FIGURE 1**  
**Processes of EC**

*Locus of EC performance*

		Private experience: self-regulation	Public display: other-authorization
<i>Criteria of EC appraisal</i>	Naturalness	Acquiescence	Proficiency
	Authenticity	Devotion	Personification

which newcomers develop ethos-appropriate desires and motivations that are reinforced by other participants in an institutional order.

This process is illustrated in Dacin et al.'s (2010) study of formal dining rituals, in which students experiencing the rituals develop the desire to belong to their society's elite strata, rather than attempt to transform the structure of privilege. For example, respondents reported feeling uncomfortable when first participating in the dining rituals. Subsequently, upon repeated exposure to the rituals and reinforcement from others, some learned to feel at home in their roles and to form greater emotional attachment to other elites. Even staff in marginalized positions experienced pride and a sense of belonging by virtue of their competent participation in collective rituals. Anthropological research suggests that informal ritual practices in recurrent interactions have an effect similar to that of the formal rituals examined in this study (Bell, 1992).

Sorting and selection processes are another path toward private EC. By virtue of their life experiences, people have access and are attracted to institutional actor roles that value or devalue certain emotions, and are repulsed by others (Burrow, Smith, & Yakinthou, 2015; Thornborrow & Brown, 2009). In other words, institutional actors often acquire private EC during early life experiences (and socialization), well before taking a position in an institutional domain. Factors such as parents' occupation and social class prompt children to develop particular kinds of emotional experiences and desires (Illouz, 2007; Thoits, 2004) and to pursue sex- or class-typed occupations associated with compatible emotion norms (Polavieja & Platt, 2014). Ethnic and religious communities similarly inculcate people with tendencies to feel particular emotions that become durable over time and help or hinder EC in other institutional domains (Moon, 2013). For example, in his study of mortuary science students, Cahill noted that "working class boys, who have long been encouraged to mask fears, are more likely to consider, and be considered for, such work than middle class girls, who may not have been encouraged to do so" (1999: 112). Conversely, Nixon (2009) noted that class socialization of working class male service workers makes it difficult for them to be *willing* to perform the kind of emotional self-regulation required in service work because it conflicts with prior selves that are part of another institutional order.

Public EC underpins eliciting authorization from an audience in interactions where the audience evaluates emotional displays to ascribe more or less EC to the performer. Participants vested in an institutional ethos monitor others' public emotions to keep them in check and ensure that people without the EC associated with a role are kept in place. When behaving in a manner that is inconsistent with the institutional order's ethos, a person may be the subject of anger, contempt, or disgust and may be actively or passively denied the institutional role that she or he seeks or is expected to enact (Douglas, 1970; Ellsworth & Scherer, 2003; Rozin, Haidt, & McCauley, 2008). The fear of deauthorization can over time be internalized and give rise to the self-regulating and disciplining processes of private EC (e.g., Creed et al., 2014). Persons are then likely to repress or avoid aspects of themselves that are deemed unnatural or inauthentic by others (DeJordy, 2008). Although in reality people not only seek authorization as institutional actors but also grant it to others, for analytic purposes we focus our theorizing on "performers" of EC (those seeking authorization as competent institutional actors), rather than on audiences.

### Acquiescence

Acquiescence refers to regulating one's emotional experiences to suit what is deemed natural for an occupant of an ascribed institutional actor role. Acquiescence entails a process in which a person internalizes what is permitted by an institutional ethos and thus comes to understand it as a personal desire. With acquiescence, institutional discipline takes the form of the self-regulation of emotive experience through internal conversations asking whether experiences "feel right" and corresponding to idealized self-understandings that are institutionally conditioned. EC arises when people have the capacity to evaluate their own emotional experiences as natural—self-evident and normal—and act with according confidence.

Even though it deals with "private" emotions and internal conversations, acquiescence is part of the institutional authorization of appropriate selves. Private emotions that are not aligned with an institutional ethos are appraised by the person him/herself in a negative way because they are inconsistent with a desired self that corresponds to an actor type given by the institution. For

example, doctors learn to repress any erotic feelings during their encounters with patients (Ashforth & Kreiner, 2002; Smith & Kleinman, 1989). Such internal conversations can in less settled situations be experienced as personal struggles and turmoil (e.g., Creed et al., 2010; Hallett, 2010), but in more settled times can also be habitual routine monitoring processes tied to ideas of self-fashioning and self-improvement (Greenblatt, 1980). The criterion of naturalness suggests that evaluations are oriented toward conformity and the need for justifying deviance. Processes of acquiescence are in large part "responsible for the fact that a great deal of people's behavior accords with social norms even when no external rewards or punishments are evident" (Shott, 1979: 1329). Acquiescence thus enables people to truly inhabit their particular actor roles in the sense that they come to feel completely "at home" in their roles.

Policing one's own emotions that are deemed invalid in light of an accepted institutional ethos is often a deeply intimate struggle fusing concerns about the self with the institutional order. For example, when people believe they do not measure up to the internalized ethos of the institutional order, they feel ashamed (Creed et al., 2014; Scheff, 1997). Thus, ministers may experience shame and try to repress their homosexual desires because these emotions violate the institutional ethos of their faith (Creed, 2003; Creed et al., 2010). Conversely, people may feel pride when they feel they measure up to the ethos exceedingly well (Shott, 1979). Jackall's (2005) study of New York detectives offers poignant illustrations of the detectives' efforts to regulate their emotional experiences vis-à-vis the ethos constructing their work as rugged and a heroic pursuit of justice. Day-to-day reality presented moral ambiguity and tragedies that threatened the detectives' subjective experience of ethos as real and, thus, their functioning as competent institutional actors.

Emotional experiences that constitute EC in a particular institutional order are stratified by institutional roles, and different emotional experiences are appropriate for role performers (Van Kleef et al., 2009; Van Kleef et al., 2008). The ethos that underpins an institutional order as a whole calls for an emotional division of labor. Acquiescence results from people's acceptance of these differences as natural and the resulting capacity to experience and enjoy emotions that are appropriate to their positions while repressing

emotions that are inappropriate. For example, in the institutional domain of industrial work's ethos of efficiency and professionalism, senior executives are expected to be passionate about setting strategic direction and resilient to challenges, while frontline staff are expected to care about customers and be eager to respond to superiors' feedback. Private EC in this case involves aligning one's experiences, passions, and desires with the expectations of one's role and suppressing emotions that undermine this capacity (Vince & Mazen, 2014). Furthermore, interactions across different strata within an institutional order involve what Gray and Kish-Gephart (2013) call intrapersonal class work, whereby people in both dominant and dominated positions work unconsciously to naturalize status distinctions and feel more comfortable about their own position in the hierarchy, whether it be dominant or dominated. Position-specific EC thus complicates role transitions, even within the same institutional order.

### Devotion

Devotion refers to regulating one's own emotions in order to be deemed authentic to the self in light of an institutional ethos. Devoted persons internalize the institutional ethos and experience the emotions that are prescribed for their actor position in a spiritual way, because through their emotions they can connect directly with the institutional ethos. Socialization and the sorting of processes into institutional orders are as important for devotion as they are for acquiescence. But because the criterion is authenticity, devoted people evaluate their emotions in terms of how sincere, genuine, and pure they are, not (as with naturalness) how normal or self-evident they are. In internal conversations, devoted people dismiss nonprescribed emotions as forced, impure, or fake. An emotion could be experienced as normal but highly inauthentic in relation to an ethos. This orientation is akin to what Ashforth and Tomiuk (2000) refer to as deep authenticity, whereby persons seek to experience oneness between their institutionally prescribed role identity and their overall selfhood. Devotion thus recruits the power of intuitive processes and spiritual dimensions of the self in the service of reproducing institutions.

For example, Widick (2003) reported that the putatively "rational" and calculating activity of stock trading is intensely emotional, since

traders are motivated not so much by rational calculations but by the enjoyment they derive from the work. He (2003: 16) described how the traders in his study derived intrinsic and almost "erotic" pleasure from their work and aspired to live up to the idealized image of the "super trader." Yet they did not characterize their work as emotional, in line with the institutional ethos that emphasizes "cold" rationality. People who possess a relatively high level of private EC for the institutional ethos of their position combine natural and authentic emotions. They regulate their emotions in internal conversations so that they see their actorhood as natural and self-evident as well as authentic and genuine. The emotional experiences of their work enable them not only to perform their role with competence but also to derive a sense of personal wholeness and purity from it.

A common manifestation of devotion as a process of aligning their emotions with institutional ethos is people's comparison of their behavior vis-à-vis their desired holistic selves. Fraher and Gabriel (2014) illustrate this behavior in their study of laid-off airline pilots. Some pilots found themselves unable to pursue alternative careers because their childhood dream of flying had been the anchor of their desired selves. Whereas research on identity has attended to the importance of such self-assessments with respect to a desired self (Ibarra, 1999; Ladge, Clair, & Greenberg, 2012; Leung, Zietsma, & Peredo, 2014; Roberts, 2005), desired selves are also a site of institutional control, whereby dominant participants of institutional orders, such as managers or military superiors, seek to shape desired selves of the dominated participants in order to exert greater control over them (Alvesson & Willmott, 2002; Anteby, 2008; Michel, 2011; Roberts, 2005; Thornborrow & Brown, 2009; Žižek, 1999).

Attachment to the ideals of a desired self does not necessarily imply an aspiration to occupy more elite positions in the institutional order. It often manifests as a desire to enact an "appropriate" position to the best of one's ability and without questioning the inequalities within the institutional order. Thus, Barton's study of exotic dancers illustrates this double-bind, as evidenced by a quote from one of her respondents: "Sometimes you feel like a goddess with all the men looking at you. It makes you feel good. I like being spoiled with attention. Attention you wouldn't get anywhere else. Any woman would" (2002: 591). This enjoyment facilitates the desire to excel in enacting

a dominated actor role. Because the emotive regulation is private and the criterion does not depend on normalcy, devotional EC in particular enables the occupants of dominated and disparaged actor roles to develop a deep attachment to institutional ethos.

### Proficiency

Proficiency refers to audiences' validation of a person's emotions as natural for a particular type of institutional actor. Put simply, proficiency means that a person's emotional displays meet audience expectations for an actor role. Meeting social expectations authorizes actorhood in that it leads others to deem a person as a proper role occupant. As noted above, emotions that are particularly conducive to drawing boundaries around an institutional order are often cast as "nonemotions," treated as natural for the occupants of respective positions, and rendered invisible (Ashforth & Kreiner, 2002). People are seen as proficient actors when their emotional displays appear skilled and dexterous to other participants in the institutional order. These persons are perceived as conventional and able to select appropriate emotional displays in a range of situations. Proficiency includes not only the overt display of specific emotions when taking on a particular role but also the appropriate modulation of emotion across situations and a lack of overt emotional expression in some institutional orders, such as in engineering (Fletcher, 1999) or academia (Bloch, 2002).

Proficiency from EC is attached to specific roles within an institutional order and also at the societal level to broader social groups, including men and women. This is illustrated in Pierce's (1995) study of a law firm where the predominantly male lawyers had to behave aggressively and practice "strategic friendliness," while the mostly female paralegals had to focus on reassuring clients. Thus, men engaged in more masculine public emotional displays, and women engaged in more feminine behaviors. The female lawyers found themselves in a double-bind:

If they act aggressively, they can be accused of being too aggressive (for a woman); if they do not act like sharks, male attorneys can accuse them of being lousy lawyers. The women's performances of strategic friendliness are deprecated and trivialized at times by male attorneys as "feminine wiles," even as the males applaud their own strategic friendliness as clever accomplishments (Fields et al., 2007: 166–167).

This example illustrates that engaging in the emotional displays associated with dominant actor roles may not be sufficient to authorize as competent actors people who occupy dominated social positions. Rather, those performing dominated actor roles may need to monitor themselves to not overstep (Fields et al., 2007) in order to avoid being denied any participation in the institutional order (DeJordy, 2008; Hudson & Okhuysen, 2009; Kellogg, 2011).

### Personification

Personification refers to displaying emotions that are perceived by others as authentic in light of an institutional ethos. Persons are authorized as institutional actors by audiences because their emotional displays are deemed quintessential or genuine manifestations of institutional ethos. As noted above, institutional ethos is an idealized fantasy that is never perfectly instantiated. Thus, participants of an institutional order can struggle to maintain their connection to ethos in their lived experiences (Stavrakakis, 2008; Voronov & Vince, 2012). The efficacy of institutional ethos as a mechanism of disciplinary power over participants in an institutional order is enhanced to the extent that some people can be pointed to as exemplars or embodiments of the ethos. Embodiment signals that ethos is attainable and real in practice. Public EC is important in allowing some people's social performance to be experienced by others as especially authentic (Alexander, 2004). Such performances embody or make tangible the institutional ethos. Instances of high public EC help uphold and bring to life the ethos of an institutional order and help legitimize the status distinctions within that institutional order. Some people become charismatic exemplars and emulate "living proof" of the reality and sublime quality of institutional ethos (Shils, 1965). A side effect of these embodiments of institutional ethos is that they may strengthen the power of idealized others in the internal conversations involved in the private evaluation of emotion.

For example, in Kellogg's (2011) study of contestation between the supporters of the traditional "iron men" ethos and reformers, there were differences even among iron men. One intern was described as "a hardworking SOB who had worked as a car mechanic. He never had anything given to him on a silver platter. You'd give him a huge scut list, and he'd roll up his sleeves and

say 'I can do it.' Not 'Why do I have to be the one to do it?'" (Kellogg, 2011: 53). He possessed a high level of public EC, and his social performances were deemed authentic by others, making him a genuine personification of the iron man ethos. Other examples of personification can be seen in studies of charismatic leaders who achieve authentic connections with their followers (Emrich, Brower, Feldman, & Garland, 2001; Steffens, Haslam, & Reicher, 2014) and in the notion of "authentic leadership" (Avolio & Gardner, 2005). Whereas leadership researchers have focused primarily on leaders' traits that enable them to achieve this connection, we highlight the role of institutional ethos in public judgments of authenticity in institutional orders.

In sum, personification is "evidence" of the realness of institutional ethos and, as such, is particularly important for institutional stability. Without personification as evidence, it becomes doubtful whether an institutional ethos can actually be accomplished. Ethos can then become reduced to a utopia without grounding in social reality and lose the capacity to discipline institutional order participants. This leads people to view the institutional ethos as cynical rather than authentic, unnatural rather than self-evident. This kind of dynamic is apparent in Huy, Corley, and Kraatz's (2014) study of failed organizational change, wherein the repeated failures of the change agents to truly "inhabit" the institutional ethos gradually eroded the perceptions of their authenticity, thereby triggering widespread resistance.

### DISCUSSION

By problematizing the category of institutional actorhood, we have sought to recast emotions as foundational to institutional processes. "Actor" is not a simple descriptor but an accomplishment resulting from a person's competence in actively fusing her or his sense of self with the demands of the institutional actor role ascribed to her/him. This competence is fundamentally emotive. Actorhood is then accomplished by performing the role in a manner that is felt to be natural and authentic. The authorization of role performances as institutionally appropriate has two loci: private EC enables self-regulation, and public EC enables other-authorization. The resulting processes of EC performance are acquiescence, proficiency, devotion, and personification. The arguments we

advance offer implications for the study of institutional stability and change, as well as for research on emotion in organization theory.

### Contributions to the Study of Institutional Stability and Change

"Individuals" or "actors" are socially constructed (Willmott, 2011) and must undergo a particular kind of transformation to be authorized as competent *institutional* actors. Thus, we explain how a person is transformed, through emotional processes, to perform the role of an actor in an institutional order. "Person" is a concept orthogonal to that of an actor, equipped with a plethora of desires and aspirations related to the self, having a complex biography, and straddling multiple institutional spheres on a daily basis.

Emotions are key to this transformation. Institutional orders infuse particular kinds of desires and aspirations into the person's sense of self, via institutional ethos, and exclude others (Cosser, 1974; Thornborrow & Brown, 2009). This implies that to the extent that a person learns and internalizes the institution's ethos and acquires the capacity to act as a competent actor in an institutional order, the possibility he or she will act as a change agent—willfully or unintentionally—is reduced when it comes to changes that challenge an institutional ethos rather than changes to roles and relationships within an ethos. With regard to institutional change, it is therefore important to explore empirically how and why people do or do not internalize ethos to varying degrees. And while we suggest that EC at the person level gives rise to all four processes at least to some extent, a separate set of questions arises at the institution level. Stable institutional orders require the participation of acquiescent, devoted, proficient, and personifying people, but researchers should investigate such questions as whether particular facets of EC are more important for the performance of different actor roles, or whether the prevalence and interaction of some facets of EC influence how institutions are created, maintained, and reproduced.

This insight complicates the observation in prior studies that divergence between actors' interests and institutional arrangements motivates them to engage in institutional change efforts (e.g., Greenwood & Suddaby, 2006; Rao et al., 2003; Seo & Creed, 2002). We see those interests as largely molded by the ethos that morally

underpins institutional orders. The result is that it is often difficult for people to recognize that their interests are not well served by their institutional arrangements, since they would need to doubt both the institutional ethos and their lived experiences within it. Furthermore, for marginalized people, developing a high level of EC often reduces their likelihood of engaging in institutional transformation. This is apparent, for instance, in Bell and Nkomo's (2003) study showing how female managers (especially black female managers) had to learn to internalize white male behavioral patterns to be deemed competent managers. This required an effortful adjustment of private emotional experiences, which gave rise to private EC. Yet the development of EC appropriate to occupants of more powerful actor roles reduced these managers' propensity to act as change agents but, as we noted in the section on proficiency, did not produce full authorization of actorhood for powerful roles.

The question about institutional change has to begin not with given interests that are at odds with institutions but with the process of interest formation. This is why possible institutional change begins at a phenomenological level with the experience of a breakdown in the immediate experience of social reality (see also Kennedy & Fiss, 2013). Thus, an important research direction is to investigate how breaches of person-institution fusion occur, thus enabling people to envision the need for institutional change. One direction for research would be to connect EC to institutional complexity (Greenwood et al., 2011; Smets & Jarzabkowski, 2013) and institutional pluralism (Kraatz & Block, 2008). Both concepts imply the simultaneous presence of multiple institutional norms that govern the behavior of people and organizations, an argument that could be extended to competition between institutional ethos and roles in connection with a concern about the overall self. It would be valuable to examine the extent to which different (potentially conflicting) institutional orders impose their ethos on participants and under what conditions people navigate this situation without breakdowns in experienced reality. Another direction of research concerns conditions under which such breakdowns translate into the more transformational change of developing an alternative institutional ethos. In this respect, research could draw on work on social utopias (Levitas, 2013), liminality (Howard-Grenville, Golden-Biddle, Irwin, & Mao,

2011; Turner, 1969), interstitial spaces (Furnari, 2014), and free spaces in social movement processes (Polletta, 1999), where social or temporal closure leads to a partial suspension of emotional self-regulation and other-authoring processes.

### Contributions to the Study of Emotions

Although our primary focus is on a key question in institutional theory, our work offers some insights for the study of emotions more broadly, primarily by contextualizing important insights about the role of emotions in organizing. Research on emotional intelligence (Jordan, Ashkanasy, & Hartel, 2002; Joseph & Newman, 2010; Mayer & Salovey, 1997), along with its organizational-level counterpart, emotional capability (Huy, 1999, 2012; Shepherd, 2011), has become important in organizational scholarship. Emotional intelligence has been linked to a variety of positive outcomes for organizations and employees. Whereas emotional intelligence has been conceptualized as a fairly stable but potentially evolving capacity to manage emotions effectively, the notion of EC as developed here allows a reinterpretation.

From the vantage point of EC, organizations define what emotional intelligence means in their institutional context and so conceive of it as something that is beneficial to meeting organizational objectives, as opposed to challenging the status quo (Fineman, 2004; Lindebaum, 2012). We argue that the concept of emotional intelligence is a rhetorical device for validating some emotions as EC. Whether the institutions that validate emotions (and, hence, what counts as EC) are beneficial is a separate question. Emotional intelligence is a specific (and often politically valuable) manifestation of EC that is complicit in fusing people's selves with an institutional order through the processes of acquiescence, proficiency, devotion, and personification. What is taken as emotional intelligence tends to be different for people occupying different actor roles within the institutional order. Thus, emotional intelligence might look different for doctors (Smith & Kleinman, 1989) and nurses (Virkki, 2007), even if they inhabit the same institutional order with a common ethos. In addition, whereas emotional intelligence researchers typically focus on measuring its general properties, discriminating it from other constructs and examining whether and how it can be enhanced in managers and employees (Cherniss, 2010; Joseph & Newman,

2010; Ybarra et al., 2014), we are interested in differences in the institutional constitution of emotional intelligence across actor positions and institutional ethos.

Furthermore, EC and its conceptual apparatus likely extend beyond institutional analysis and its emotional foundations, to other forms of social organization in which the performance of predefined roles is authorized by an audience. Judgments of naturalness and authenticity and the existence and performance of roles are also central to research on groups, formal organizations, and markets (e.g., Bechky, 2006; Giorgi & Weber, 2015; Golden & Zajac, 2001; Kahn & Kram, 1994), and EC can thus potentially be extended beyond institutional analysis.

More broadly, we believe our work can advance a more social conceptualization of emotions and selfhood in organizational research. Implicit in much organizational research is the assumption that "context" (whether organizational or institutional) impinges on persons. For example, with respect to research on emotion, even as scholars increasingly acknowledge and try to incorporate the understanding of context into micro theories (Gooty et al., 2009; Grandey, 2000; Ybarra et al., 2014), the conceptualization of context as an external force that mediates emotional experiences and displays persists (e.g., Elfenbein, 2007).

In contrast, our institutional model of EC aligns with the conceptualization of emotions as inherently relational (Emirbayer, 1997; Emirbayer & Goldberg, 2005) and of the self as fundamentally social, sustained through the performance of institutional roles (Barbalet, 2001; de Rivera, 2014; Mead, 1934). As William James noted, "No more fiendish punishment could be devised . . . than that one should be turned loose in society and remain absolutely unnoticed by all the members thereof" (1890: 293). Thus, rather than conceptualizing institutional orders as variables that constrain people's innate individuality, we advance the view that people derive their sense of self from participation in a variety of institutional orders that make them "who they are," channeling their desires and aspirations (Anteby, 2008; Brown, 1997; Thornborrow & Brown, 2009). We acknowledge that tensions often arise as multiple institutional orders make contradictory claims on a person's sense of self, and it is important to investigate the emotion work people engage in to maintain their authorizations in their institutional orders, including both the personal and



institutional factors that facilitate or hinder such efforts (Voronov & Yorks, 2015). People enter fields not as blank slates but as members of various social groups (e.g., gender, class, race, sexual orientation). Prior experiences in those groups make emotional experiences and displays less amenable to being shaped by professions and various field-specific institutional forces (Cahill, 1999; Kellogg, 2011; Molinsky, 2013; Nixon, 2009). Moreover, people likely differ in their flexibility and capacity to adapt to different institutional orders and differences in institutional ethos. It would be valuable to examine the personal and biographical factors that make some people more flexible than others.

### Methodological Considerations

We believe that research design considerations are more important for empirical applications of our theory than choice of methodological tradition. EC should be understood as institutionally conditioned and durable, yet a person can also move across positions within an institutional order or across institutional orders. Private and public evaluations determine whether the tendencies to experience and express emotions in particular ways are deemed EC or not. It is thus necessary for researchers to investigate separately (a) people's public and private emotional tendencies across different situations and positions and (b) the institutional ethos for evaluating experienced and expressed emotions, and how expectations are stratified by positions.

**Performing EC.** Organizational scholars have increasingly recognized the important role of language in reproducing or subverting institutional order (Brown et al., 2012; Zilber, 2009). At the same time, people also use language flexibly and reflexively (Whittle, Mueller, & Mangan, 2008). Accordingly, language use at the personal, social position, and institutional level can offer revealing insights into EC, especially in its public form. For example, Whittle et al.'s (2008) study of an effort to implement a quality initiative in an organization highlights the change champion's attempts to communicate in a manner resonating with audiences as authentic, using such rhetorical devices as empathy and reassurance in a flexible and context-sensitive manner. Thus, close investigation of such strategies would be valuable, with a special focus not only on the person-specific tendencies to deploy emotions in

a particular manner but also on position-appropriate toolkits that various occupants of the same actor role draw from. It is necessary, then, to observe the use of emotional displays in context (Smets, Burke, Jarzabkowski, & Spee, 2014) and to combine these observations with people's reflections that reveal their understanding of their positions and the emotional displays appropriate for those positions.

Private EC, of course, is more difficult to assess, but in-depth phenomenological interviews that enable respondents to establish trust with the researcher and share their stories freely can be fruitful (Creed et al., 2010; Fraher & Gabriel, 2014). Interviews can also be more revealing when people are dealing with changes that require them to alter their EC either because they are transitioning from one institutional order to another (Molinsky, 2013) or because the institutional order they currently occupy is undergoing changes (Hallett, 2010).

**Assessing EC.** With respect to evaluations of naturalness and authenticity, we suggest examining the ways in which emotions are interpreted by people in the course of their day-to-day interactions, as well as how emotions are infused into narratives, metaphors, and organizational arrangements. Comparisons of situations where breakdowns occur with those where social interactions operate smoothly would be useful. Breakdowns are particularly revealing with respect to the taken-for-granted norms of evaluating EC and what holds these norms in place. Hence, studies of transitions, breaches, or environmental change are especially informative.

Language may again offer an important window into how emotions are evaluated. For example, it might be valuable to map the semiotic or rhetorical toolkits of emotion words and expressions that are available within a particular institutional order and to occupants of different positions, be they particular institutional identities (e.g., Barley, 1983; Weber, 2005; Weber et al., 2008) or broader social categories based on class, sex, ethnicity, nationality, or occupation. For example, Kitayama, Mesquita, and Karasawa (2006) found that Japanese people experience engaging emotions (e.g., friendly feelings and guilt) more frequently and more strongly than they experience disengaging emotions (e.g., pride and anger), but Americans show the reverse. Of special interest from an institutional perspective would be the toolkits used in situations that are explicitly

evaluative and by people in institutional positions of power who are evaluating others.

Another important way to understand the institutional evaluation of emotions is through the evaluative practices, conventions, and devices in use in an institutional order. The growing literature on social evaluation (e.g., Boltanski & Thévenot, 2006; Lamont, 2012) offers a range of approaches that can be adapted to the evaluation of emotions. Dramaturgical studies that highlight the rituals through which social order is affirmed and stabilized (Dacin et al., 2010; Gardner & Avolio, 1998; Rosen, 1985) offer valuable insight. For example, Rosen's (1985) study of an advertising agency's annual staff breakfast reveals how the communication techniques and physical arrangements of the event reinforced the dominant social structure.

More generally, mechanical measurements of evaluation content may be less pressing in EC studies than mapping evaluation processes. Kellogg (2009), Creed et al. (2010), Hallett (2010), Huy et al. (2014), and others have demonstrated the utility of context-rich situated approaches for advancing our understanding of how people experience institutional and organizational phenomena. Such approaches might be especially conducive to investigating the performance and evaluation facets of EC in a more integrated way. Other innovative methodologies, such as partial ethnography (Alvesson & Deetz, 2000), which enables a fine-grained analysis of a relatively brief event, or video ethnography (Smets et al., 2014), which enables close analyses of bigger slices of organizational life, would be highly useful. More quantitative analyses of large quantities of text are promising for analyses at the institutional level, but they are limited in terms of representing the lived reality dimension of people (e.g., Mohr & Bogdanov, 2013). As Fineman explains, emotion can be studied "without measuring it. In doing so the researcher's sovereignty and tools give way to more interactional, context-focused, inquiry. The understandings so produced are inherently less precise . . . [but] abundant in insight, plausibility and texture" (2004: 736).

## CONCLUSION

The study of emotion in institutions is a fast-growing area of research. We theorized a central but neglected domain of this area: the emotional foundations of actorhood in institutions. Emotions—in the form of EC—are central to institutional orders.

Because emotions are involved in the accomplishment of institutional actorhood, they are neither truly personal nor external to institutions but, rather, are constitutive of institutional orders by recruiting and disciplining human experience and efforts in the service of institutional ethos. Our central concern in this article was to understand the processes of fusion between people and institutions. In order to progress, work at the intersection of emotions and institutions will benefit from further integration.

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