

## Legitimacy Revisited: Disentangling Propriety, Validity, and Consensus

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**ABSTRACT** Recent research has conceptualized legitimacy as a multi-level phenomenon comprising propriety and validity. Propriety refers to an individual evaluator's belief that a legitimacy object is appropriate for its social context, whereas validity denotes an institutionalized, collective-level perception of appropriateness. In this article, we refine this multi-level understanding of legitimacy by adding a third, meso-level construct of 'consensus', which we define as the agreement between evaluators' propriety beliefs. Importantly, validity and consensus are distinct and can be incongruent, given that an institutionalized perception can hide underlying disagreement. Disentangling validity from consensus is a crucial extension of the multi-level theory of legitimacy, because it enables an improved understanding of the legitimacy processes that precede sudden and unanticipated institutional change. In particular, while previous works considered revised propriety beliefs as the starting point for institutional change, our account emphasizes that the disclosure of the actual (vs. merely assumed) belief distribution within a social context may instigate institutional change. To study the interplay of propriety, validity, and consensus empirically, we propose a set of experimental designs specifically geared towards improving knowledge of the role of legitimacy and its components in institutional change.

**Keywords:** consensus, experiments, institutional change, legitimacy, microfoundations, propriety, validity

### INTRODUCTION

The burgeoning multi-level view of legitimacy seeks to reconcile the perspective that legitimacy may reside at the collective level 'independent from particular observers' (Suchman, 1995, p. 576) with the view that legitimacy involves the perceptions of individual evaluators (Tost, 2011). Drawing on a distinction that was introduced more than 100 years ago by Weber (1978[1918]), Bitektine and Haack (2015) advanced a

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multi-level theory of legitimacy that differentiates between ‘propriety’ and ‘validity’ as the individual- and collective-level judgments made in the legitimacy process, respectively. Following these theoretical advancements, empirical research has started to investigate changes in propriety beliefs (Finch et al., 2015; Jahn et al., 2020) and to describe the promotion of propriety and validity through communication (Gauthier and Kappen, 2017). In addition, scholars have examined cross-level interactions between propriety and validity (Haack and Sieweke, 2018) and elaborated the effect of these interactions on organizational change (Huy et al., 2014), practice implementation (Jacqueminet and Durand, 2019), and institutionalization (Arshed et al., 2019).

Recognizing that legitimacy results from a process of social judgment formation that entails multiple levels has been a pivotal step in extending and revising insights from previous conceptualizations of organizational legitimacy (Deephouse et al., 2017; Suddaby et al., 2017). However, despite all the efforts that have been devoted to the study of legitimacy, the long-standing practice of equating legitimacy with collective agreement has impaired scholars’ capacity to theorize the precise legitimacy processes that precede institutional change, and has stalled intellectual progress in this core area of organizational research. While extant research has often implied that institutional change is initiated through intra-individual change in propriety beliefs (e.g., Greenwood et al., 2002; Tost, 2011), we theorize that institutional change can also be instigated when individual evaluators discern the distribution of others’ propriety beliefs in a reference group. Importantly, sudden disclosure of the extent to which an apparently valid legitimacy object is agreed upon in terms of propriety beliefs can have drastic institutional consequences. In some instances, validity may involve low agreement or even significant disagreement in propriety beliefs, making institutional stability inherently fragile (Bitektine and Haack, 2015; Suddaby et al., 2017). In other instances, an institutional arrangement may lack validity even though a silent majority of evaluators deems it proper, suggesting that an alternative institutional order may enjoy greater approval and potential support than commonly assumed. Hence, there is a clear need to theorize and study the scope and nature of the (potential) incongruity between validity and the distribution of propriety beliefs.

We contribute to legitimacy research by addressing this major gap in two ways. First, we advance the largely unexplored meso-level legitimacy component of ‘consensus’, which forms the missing link connecting the micro- and the macro-levels of legitimacy. Whereas validity denotes an institutionalized, collective-level perception of appropriateness and a status of supra-individual exteriority illustrating ‘how things are,’ consensus represents a meso-level construct that denotes the degree to which evaluators in a given social collective agree that a legitimacy object is proper. Although consensus and validity overlap in the sense that an institutionalized perception may reflect agreement with respect to propriety beliefs, they are not the same, given that an institutionalized perception can hide underlying disagreement. That is, while a legitimacy object can be valid at the collective level, the actual consensus among the individuals within that collective can be either high (i.e., virtually all evaluators agree that a legitimacy object is proper) or low (i.e., a considerable share of evaluators disagrees that the legitimacy object is proper, meaning that propriety beliefs are heterogeneously distributed). Adding the consensus construct to legitimacy theory clarifies that seemingly widely endorsed institutional arrangements may mask private dissent, which – when revealed – may lead individual evaluators to change their perceptions and behaviours and to support institutional change efforts.

Conversely, marginalized institutional arrangements may appear invalid even though many evaluators consider them proper in private, resulting in low validity and high consensus. We expect institutional change to become likely whenever such an incongruity between validity and consensus is identified and publicly revealed. Thus, introducing the concept of consensus has the potential to significantly advance our understanding of the legitimacy processes that precede sudden and unanticipated institutional change.

Second, theoretical and methodological choices necessarily co-evolve, such that theory cannot progress in the absence of adequate methods for testing and validating the relationships between its core concepts (Haack et al., 2020a). As such, theoretical progress requires advancements in empirical research and methodology. Accordingly, in order to advance empirical research on legitimacy as a multi-level process, we propose a set of experimental designs that are geared specifically toward the study of the intricate interactions between propriety, validity, and consensus, thus, allowing for testing our proposed theory. Experimental designs can enable scholars to explore relationships ‘that are often suggested but difficult to isolate in contextually rich field studies’ (David and Bitektine, 2009, p. 171), and they can be particularly useful for differentiating between the distinct perceptual components of legitimacy. Recognizing the ‘value of method in advancing theory’ (Greenwald, 2012, p. 106), our paper suggests that bringing in experiments can help to significantly advance or even reorient legitimacy research in institutional theory, in particular with respect to the underlying dynamics and legitimacy processes of institutional change.

## **THEORETICAL BACKGROUND**

Research on legitimacy, commonly defined as a ‘generalized perception or assumption that the actions of an entity are desirable, proper, or appropriate’ (Suchman, 1995, p. 574), has become increasingly prominent in management and organization studies – and, in particular, in institutional theory (Harmon et al., 2015; Suddaby et al., 2017) – to the extent that legitimacy has been described as ‘perhaps the most central concept in institutional research’ (Colyvas and Powell, 2006, p. 308). The significant scholarly attention devoted to the topic is evidenced by the increasing flow of papers devoted to the analysis of legitimacy (e.g., Castello et al., 2016; Etter et al., 2018; Fisher et al., 2016; Haack et al., 2014; Hengst et al., 2020; Huy et al., 2014; Jacqueminet and Durand, 2019; Lewis et al., 2020; Scherer et al., 2013). This line of research stresses that through legitimacy, organizations acquire ideational and material support (e.g., access to financial and human resources) and increase their prominence and influence, all of which are fundamental to their growth and survival (Zimmerman and Zeitz, 2002).

The notion of legitimacy has been applied to a plethora of theoretical and empirical contexts, adding considerable surplus meaning to the construct (Suddaby et al., 2017). Scholars have often relied on Suchman’s (1995) rather broad definition of legitimacy, without specifying what particular aspect of legitimacy they are examining (Johnson et al., 2006). As a result, legitimacy research in institutional theory is currently entering a formative phase, characterized by attempts to bring greater construct clarity and theoretical coherence to the subject area (Deepphouse et al., 2017). Recent works have

specified different perspectives in legitimacy research (Suddaby et al., 2017) and have distinguished legitimacy from related constructs such as reputation and status (Bitektine, 2011; Bitektine et al., 2020; Washington and Zajac, 2005) as well as stigma (Devers et al., 2009; Helms et al., 2019). Whereas institutional theory has focused mainly on the legitimacy process at the collective level (Zelditch, 2004) and maintained that an object's legitimacy depends on the approval of a social group as a whole, the notion of legitimacy as a 'generalized perception' (Suchman, 1995, p. 574) ultimately derives from the coalescence of the perceptions and judgments of individual evaluators (Tost, 2011; Zimmerman and Zeitz, 2002). Hence, it is important to understand legitimacy judgment formation and change at the individual level while simultaneously achieving greater clarity and theoretical coherence about legitimacy's inherent multi-level nature.

Drawing on the work of Weber (1978[1918]) and subsequent research in sociology (Dornbusch and Scott, 1975; Zelditch, 2001), Johnson and colleagues (2006) highlighted the dual nature of legitimacy and re-conceptualized its formation as an intricate social process consisting of *validity*, a collective-level perception of appropriateness, and *propriety*, an individual evaluator's belief that a legitimacy object is appropriate for its social context. In this view, legitimacy occurs 'simultaneously at the collective level (where perceptions of appropriateness are created, shared, and validated) and at the level of the individual, who uses collective perceptions to derive his or her judgment and engages in appropriate action' (Haack and Sieweke, 2018, p. 487). Bitektine and Haack (2015) advanced the multi-level view of legitimacy and developed a theory of how macro-level validity shapes or even determines micro-level judgments and behaviours and how these judgments and behaviours coalesce to constitute validity. They highlighted that institutional stability at the macro level can be based on 'silenced' micro-level heterogeneity in propriety beliefs, as individual evaluators may choose not to disclose their propriety beliefs for fear of social sanctions, because they (sometimes erroneously) perceive their beliefs represent a minority opinion. It is only after the removal of factors conducive to silencing that individual evaluators may disclose their propriety beliefs and start to actively challenge the status quo. Similarly, Tolbert and Darabi (2020) pointed out that different kinds of institutional pressures may generate variations in motives for conformity; they illuminated how the explicit recognition of these motives can explain observed heterogeneity in individual and organizational behaviour. These works suggest that to explain institutional change, it is crucial to understand the antecedents and underlying dynamics of multi-level legitimacy formation, particularly with respect to the interaction between propriety and validity.

Although the validity-propriety distinction is relatively established in the field of sociology (e.g., Johnson et al., 2006), much legitimacy research in institutional theory, and more generally in organization and management studies, has ignored the propriety concept and focused exclusively on validity as the collective-level conceptualization of legitimacy (Zelditch, 2004). While most studies do not even make the focal level of analysis explicit, some of them confuse propriety with validity. For instance, some authors imply a collective-level understanding of legitimacy by referring to Suchman's (1995) definition of legitimacy as a 'generalized perception', even though they are actually concerned with the analysis of individual judgments of legitimacy (e.g., Brown and Toyoki, 2013; Foreman and Whetten, 2002; Higgins and Gulati, 2006). Suchman's (1995) influential

tripartite conception of legitimacy (cognitive, moral, and pragmatic) itself implies a conflation of propriety and validity components, as pragmatic legitimacy is said to rest on the 'self-interested calculations' of individual actors (p. 578), suggesting that legitimacy is *not* 'independent of particular observers' (p. 576). This conceptual ambiguity, which characterizes much of the extant research on legitimacy, has made it rather difficult to integrate empirical findings coherently and hindered progress in this important area of research. Conflating propriety with validity is highly problematic, because these two constructs constitute two fundamentally different components of legitimacy and are likely to have distinct antecedents and behavioural consequences. Thus, failing to clearly distinguish between these two components of legitimacy has introduced considerable concept ambiguity and impeded the ability of legitimacy researchers to advance scholarly understandings on legitimacy as an *explanandum* in its own right (Suddaby et al., 2017).

In this paper, we seek to bring clarity to existing legitimacy research in institutional theory and further advance the understanding of legitimacy as a multi-level phenomenon. While the model of Bitektine and Haack (2015) has drawn attention to the complex interactions between micro and macro levels of legitimacy, their framework remains ambiguous, as it has equated the institutionalized part of legitimacy with common agreement, defining validity as '*consensus* opinion shared by others' (p. 51; emphasis added). Hence, although Bitektine and Haack (2015) pointed to the possibility that validity may conceal heterogeneity in propriety beliefs, their research has not conceptually disentangled validity from common agreement.

We address this important gap by introducing a missing link – that of consensus, a meso-level construct that describes the degree to which evaluators within a social group agree that a given legitimacy object is proper. We elaborate that consensus and validity are not the same, given that a taken-for-granted perception of validity may conceal dissent among individual evaluators, and we theorize that trustful communication and social interaction among evaluators plays a key role in revealing the actual (vs. apparent) consensus within a reference group. In addition, we explicate why the distinction between validity and consensus constitutes a crucial extension of the multi-level theory of legitimacy and elaborate why theorizing and testing the relationship between the legitimacy components<sup>[1]</sup> is essential for advancing scholarly understanding of the legitimacy processes preceding sudden and unanticipated institutional change (Clemente and Roulet, 2015; Oliver, 1992). In the following sections, we will first examine each of the three legitimacy components, and then, develop theory on their complex interactions. We will focus particularly on the role of consensus in these interactions and in related legitimacy and institutional change processes.

### **Propriety: Legitimacy at the Individual Level**

The individual level of legitimacy has so far received only scant attention in institutional theory and organization and management studies. Zelditch (2004) even went so far as to suggest that institutional theory has no concept of legitimacy at the individual level. Consequently, relatively little is known about how the individuals within a specific evaluator group assess the propriety of organizations, practices, structures, and other types of legitimacy objects and, by extension, how these individuals construe legitimacy. Indeed,

before the conceptual contributions by Tost (2011) and Bitektine and Haack (2015), virtually no attempt had been made by institutionalists to theorize or examine the formation and change of *propriety*.

Propriety is the individual-level component of legitimacy and refers to an individual evaluator's endorsement of a legitimacy object or the evaluator's belief that the essence, qualities, or actions of that object are appropriate for its social context (Dornbusch and Scott, 1975; Tost, 2011). The term 'legitimacy object' denotes the focal entity that is being assessed, such as an organization, practice, or procedure (Johnson, 2004). Evaluators typically form judgments about an object's propriety in a 'passive' mode, where they operate as 'intuiters' who quasi-automatically draw on judgement heuristics (Haack et al., 2014). Intuiters use heuristics such as the judgments and actions of others (Rao et al., 2001; Rossman and Schilke, 2014) and draw on associations, analogies, or similarities between one object and another already legitimate object (Baum and Oliver, 1991; Stuart et al., 1999). Using such cues allows evaluators to reach a judgment quickly and effortlessly (Kahneman and Frederick, 2002). However, under conditions of competing or ambiguous institutional prescriptions (Greenwood et al., 2011) or in the aftermath of an exogenous shock (Greenwood et al., 2002; Tost, 2011), evaluators may also render a propriety belief in a more 'active' mode, in which they deliberately and carefully assess the legitimacy object on the basis of specific standards and principles (Huy et al., 2014; Lamin and Zaheer, 2012).

Propriety beliefs have important behavioural consequences. If the prescriptions of specific judgment standards and principles are met, evaluators deem the object proper, view it as a desirable model of action, and ultimately support the legitimacy object (Walker, 2014). In contrast, if the object is deemed not consistent with standards and principles, evaluators do not grant propriety and may withhold support (potentially contingent on their perceptions of validity; see below). In cases of severe transgressions, such as organizational wrongdoing or scandal (Greve et al., 2010), evaluators will disapprove of the object and deem it improper (Devers et al., 2009; Hudson, 2008), with behavioural reactions ranging from avoiding (Hudson and Okhuysen, 2009) or resisting the legitimacy object (Huy et al., 2014) to openly condemning it (Maguire and Hardy, 2009).

### **Validity: Legitimacy at the Collective Level**

*Validity* is the institutionalized, collective-level component of legitimacy and describes the acceptability of an object at the collective level or the 'generalized perception' that the nature or activities of a legitimacy object are appropriate for its social context (Suchman, 1995). Once formed, validity 'has a life of its own' (Zelditch, 2006, p. 346), meaning it exists objectively as a social fact and is largely independent of the subjective propriety beliefs of single evaluators. The 'facticity' of valid objects signals to evaluators how things are, creating the perception of a natural, inevitable, and collectively approved order (Berger and Luckmann, 1967). Although an inherently collective-level construct, validity as the objectified part of legitimacy also affects the appraisal process of individual evaluators and enter evaluators' cognition in the form of a 'validity cue', which they can use to form a subjective validity belief (Tost, 2011). Such a validity belief represents an individual's judgment that a legitimacy object is perceived as appropriate by a collectivity

of evaluators. Evaluators' perceptions of validity (i.e., validity beliefs) are bolstered (1) by authorization, which means that an authority (e.g., an expert or high-status actor) has acknowledged a given object as legitimate and (2) by endorsement, which means that an evaluator's peers have accepted the object's legitimacy (Dornbusch and Scott, 1975). Indeed, approval by 'judgment validation institutions' such as the media, government, and the judicial system (Bitektine and Haack, 2015, p. 51) and 'voices of the common man' (Vaara, 2014, p. 506) constitute major sources of validity. It follows that the views and assessments of others play an important role in the construction of validity (Johnson, 2004). In addition, the absence or lacking visibility of contrary activities constitutes a subtle but equally powerful source of validity (Haack and Sieweke, 2018; Tost, 2011).

Validity, in turn, has important implications for evaluators' propriety beliefs and their behaviour, and thus, ultimately for the stability of social systems and institutions. Given that alternatives are 'literally unthinkable' in taken-for-granted contexts (Zucker, 1983, p. 5), the prescriptions that derive from a valid object are binding. When an object is valid, individual evaluators do not question it; they simply comply (Johnson, 2004). While evaluators consider proper objects desirable, and thus, follow prescriptions voluntarily and sometimes enthusiastically, compliance with valid, institutionalized objects is based on social obligation and control (Johnson, 2004; Johnson et al., 2006). The coercive power of validity has been demonstrated by research finding that validity attenuates negative emotions in response to injustice, and as a result it helps sustain stratified order (Johnson et al., 2016). As mentioned above, in cases where validity conflicts with propriety, evaluators may choose to conceal their propriety beliefs because they fear social sanctions and a loss of social approval (Bitektine and Haack, 2015), to the extent that they may even actively enforce the support of a valid legitimacy object they privately consider improper (Centola et al., 2005; Willer et al., 2009). By contrast, invalidity reduces people's compliance and support, even if evaluators, in private, consider a legitimacy object to be proper (Massey et al., 1997).

Validity may also affect compliance indirectly through its effect on propriety. Works based on the status theory of legitimacy suggest that referential structures (which represent legitimacy at the collective level) enable evaluators to develop their propriety beliefs (Berger et al., 1998; Ridgeway and Berger, 1986). Other research has shown that evaluators are more likely to judge a legitimacy object as proper that is (perceived as) valid (Walker et al., 1988; Yoon and Thye, 2011), even if they initially deemed it improper (Hegtvedt and Johnson, 2000; Johnson et al., 2000). For instance, evaluators have been found to gradually adapt their propriety beliefs regarding inequality to the perceived validity of economic inequality (Haack and Sieweke, 2018). Validity thus has a bolstering effect on propriety and a 'canceling effect' on impropriety (Zelditch, 2001, p. 44). Conversely, when a legitimacy object lacks validity, evaluators may begin to question the object and are more likely to disapprove of it personally.

### **Consensus: The Missing Link in Legitimacy Theory<sup>[2]</sup>**

Extending the legitimacy dichotomy of propriety and validity, we suggest that a meso-level component is needed to bridge the micro and the macro of legitimacy – that of consensus. While consensus has not yet been systematically elaborated in institutional

theory, several scholars have hinted at it in passing, noting that it constitutes an important element or outcome of the legitimacy determination process. For instance, when describing the 'legitimacy-as-process' perspective, Suddaby et al. (2017, p. 452) suggest that legitimacy 'is understood to occur as the product of consensus between multiple actors in a social field'. Other works have described legitimacy maintenance as 'dynamics of agreement and disagreement' (Patriotta et al., 2011, p. 1808) and suggested that legitimacy depends on evaluators' consensus about what features and actions a legitimacy object should have in order to be accepted in a specific context (Cattani et al., 2008). Similarly, Drori and Honig (2013, p. 371) proposed that legitimacy evolves and becomes validated by a 'general consensus in society'.

Notwithstanding the potential importance of consensus for legitimacy theory, much ambiguity exists with respect to the construct of consensus, or 'what people are actually agreeing on' (Markóczy, 2001, p. 1014). Previous works (including our own) have regularly conflated consensus with validity, often implying that consensual agreement and validity are literally the same and treating these concepts quasi-synonymously. However, we propose that this practice is misguided and that scholars are better served in treating these two components of legitimacy as analytically distinct. As discussed above, validity may lead individuals to hide their propriety beliefs; thus, a valid legitimacy object does not necessarily reflect agreement but can in fact be subject to significant (yet concealed) disagreement. Although we acknowledge that validity may inform propriety beliefs (as discussed above), a notable portion of evaluators may resist validity pressures. Hence, we challenge the assumption, often made implicitly, that consensus and validity are virtually the same; we develop a refined understanding of consensus and disentangle it from validity. In particular, the specification of consensus and validity as *related but distinct* elements in the multi-level legitimacy concept offers an important correction to the model by Bitektine and Haack (2015) and has the potential to proffer significant advancements in scholarly understandings of the legitimacy processes preceding institutional change. Specifically, and as elaborated below, disentangling validity from consensus supports the critical but largely overlooked insight that institutional arrangements that are considered valid may in fact be inherently fragile, facing contestation and sudden decline once the existence of substantial disagreement is revealed (Patriotta et al., 2011).

We define consensus as the degree to which individual members of a reference group (e.g., team, organization, industry, field, or society at large) agree that the essence, features, or activities of a legitimacy object are proper for a given social context. High consensus indicates that a propriety belief is shared by most evaluators within a reference group, whereas low consensus indicates that propriety is contested (e.g., Pfarrer et al., 2008; Bundy and Pfarrer, 2015).<sup>[3]</sup> Hence, despite the existence of a 'generalized perception' that the nature or activities of a legitimacy object are appropriate for its social context and are thus valid, in the sense of being exterior to the subjective experience of individual evaluators (Berger and Luckmann, 1967; Suchman, 1995), substantial heterogeneity in propriety beliefs may nonetheless exist, as a nontrivial number of evaluators may privately oppose the object. It follows that a legitimacy object's validity can be associated with very different, yet often concealed, distributions of propriety beliefs. As Figure 1 illustrates, a valid legitimacy object may display a normal distribution of propriety beliefs (panel 1.1), a distribution of greater or lower variation in propriety beliefs



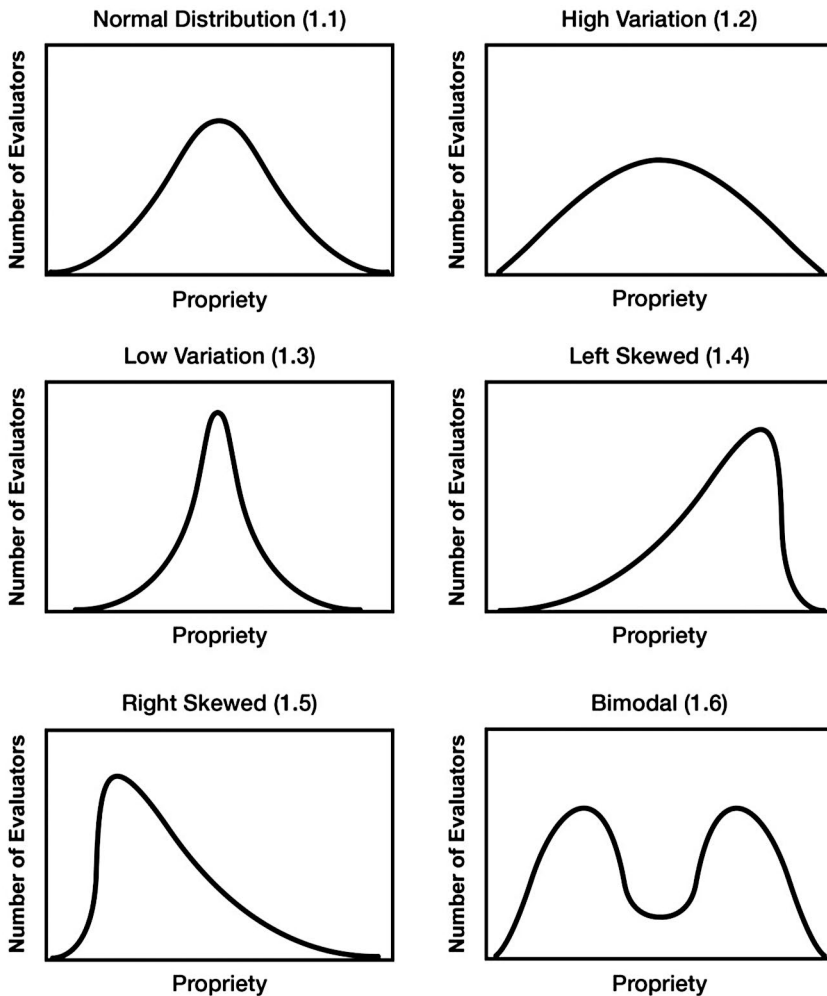


Figure 1. Different distributions of propriety beliefs

(panels 1.2 and 1.3), a left or right skewed distribution (panels 1.4 and 1.5), or even a bimodal distribution reflecting a polarization in evaluators' propriety beliefs (panel 1.6). Many other distributions are conceivable.

If silencing is present or communication through which evaluators can reveal their propriety beliefs is lacking, the true nature of the belief distribution will be masked by perceptions of validity. In such contexts, evaluators have no, or only partial, information about the distribution of propriety beliefs in their reference group. Evaluators may then openly support the legitimacy object on the basis of their validity beliefs, and the absence of public challenge contributes further to the object's stability (Correll et al., 2017). While the exact belief distribution frequently is unknown, the gradual or sudden disclosure of the degree to which a legitimacy object is consensually approved may have drastic institutional consequences, depending on the size of the congruity between validity and consensus. By 'congruity', we mean the degree to which consensus maps onto

validity. For instance, a valid legitimacy object can be matched by substantial agreement in propriety beliefs (high validity-consensus congruity) or it could be associated with heterogeneity in propriety beliefs (low validity-consensus congruity, or high incongruity). Although an incongruity between validity and consensus may have been concealed, it looms in the background and may erupt when being problematized, exposing the fissures of a seemingly stable institutional order. As such, it is important to analyse the distribution of propriety beliefs about a given legitimacy object (consensus) and contrast this analysis with the (perceived) validity of that object.

The distinction between validity and consensus clarifies that wide consent is not a necessary condition for validity. Even if evaluators do not endorse an object individually, this object can still be considered valid if these evaluators falsely assume that others in their reference group believe the object is proper, thus, granting the object validity (Correll et al., 2017). Suddaby and colleagues (2017) posited that, in extreme cases of collective misperceptions, legitimacy objects may remain valid even though not a single evaluator privately endorses the object. In contrast, when a majority of evaluators privately hold favourable propriety beliefs about an object (high consensus), this object can still lack validity if evaluators falsely assume that most of the evaluators in their reference group hold unfavourable propriety beliefs and accordingly fail to disclose their own beliefs (Suddaby et al., 2017; Zelditch and Walker, 2003). The validity of a legitimacy object can thus exist and guide behaviour even in the presence of incongruent consensus – especially, as we shall elaborate next, when network ties among the members of a group are weak, which makes it difficult for evaluators to communicate trustfully and detect the actual or ‘true’ propriety beliefs of the other members of a given reference group (Canales, 2016; Westphal and Bednar, 2005; Zhu and Westphal, 2011). The following sections first explicate the conditions that enable evaluators to discern that validity may not be congruent with actual consensus, and then, theorize the legitimacy processes that unfold once evaluators discover this incongruity.

Figure 2 represents a schematic illustration of the key arguments we develop below. While we mostly illustrate relevant dynamics in the context of *de*legitimation, our argument could be laterally reversed to describe a legitimation process. That is, our model may also be applied to explain the dynamics that contribute to strengthening the legitimacy of emerging and not yet fully established institutional arrangements – that is, alternative ‘sociocultural constructions that prescribe appropriate organizational behaviours and that shape and enforce patterns of interests and privilege’ (Micelotta et al., 2017, p. 1886). Indeed, delegitimation of the status quo is frequently associated with the legitimation of innovation and novelty (Oliver, 1992); while the validity of an established legitimacy object may gradually erode, the validity of another not yet taken-for-granted legitimacy object may grow.<sup>[4]</sup>

## WHY CONSENSUS MATTERS

Our proposed account emphasizes that consensus does not necessarily depend on, and is conceptually distinct from, validity. The implications of the distinction between validity and consensus are profound. Acknowledging that validity and consensus are not the same implies that the persistence and stability of valid legitimacy objects – including

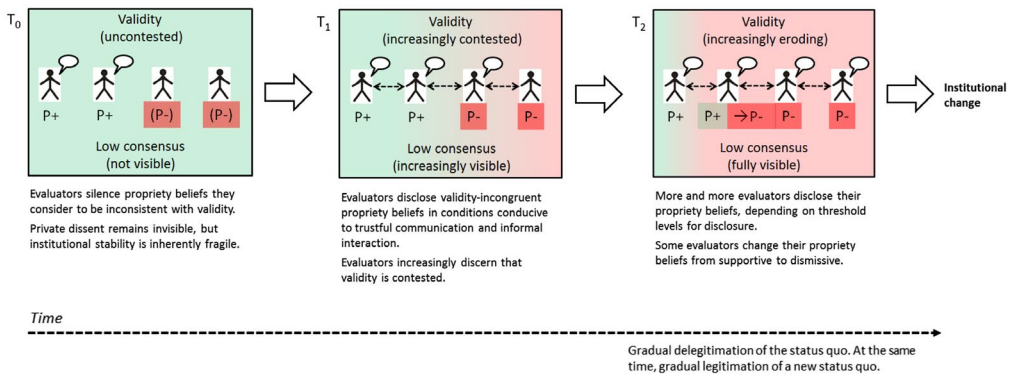


Figure 2. Disclosure of incongruity between validity and consensus [Colour figure can be viewed at [wileyonlinelibrary.com](http://wileyonlinelibrary.com)]

status orders in organizations (e.g., Berger et al., 1998; Correll et al., 2017), widely diffused yet unpopular norms (e.g., Prentice and Miller, 1993; Willer et al., 2009), and systems of social or political dominance (e.g., Kuran, 1995) – can be solely based on an ‘illusion of support’ and are thus inherently fragile (Centola et al., 2005, p. 1010; Rao et al., 2001). As (the appearance of) consensus breaks down, validity loses its influence (Asch, 1951). If consensus for a valid legitimacy object is merely presumed but not real, then, the disclosure that a valid object is in fact contested may initiate a process of problematization, delegitimation, and deinstitutionalization, opening up opportunities for the legitimation of a new institutional order, and thus, institutional change (Greenwood et al., 2002). Conversely, an ‘illusion of resistance’ may prevail for those legitimacy objects that are seemingly contested or opposed but actually enjoy substantial private endorsement, which – when publicly revealed – may trigger a process of legitimation.

### Revealing the Actual Degree of Consensus

What conditions enable evaluators to identify the degree to which a valid legitimacy object is actually consensually approved? Although several circumstances might play a role, we highlight the critical importance of (1) communication ties and (2) collective action in helping evaluators discern the actual degree of consensus in their reference group, that is, whether most individuals endorse or have concerns about a valid legitimacy object or whether there is significant disagreement about the acceptability of the object. As illustrated in Figure 2 (T<sub>0</sub>), in the absence of communication ties and interaction, evaluators may silence propriety beliefs which they consider to be inconsistent with validity. For instance, research has found that investment analysts tend not to disclose their reservations regarding the adoption of stock repurchase plans (a valid legitimacy object in this context) because they underestimate the extent to which other analysts share their concerns – a phenomenon that is less pronounced when analysts communicate frequently (Zhu and Westphal, 2011). Similarly, Westphal and Bednar (2005) suggested that managers are less likely to silence their unfavourable propriety beliefs regarding a company’s strategy when they have opportunities to casually interact and communicate with other managers. Research by Canales (2016) indicated that informal dyadic communication and settings

where evaluators can speak 'off the record' are particularly effective in promoting the disclosure of silenced propriety beliefs, whereas communication in larger group settings, such as public forums, is found to consolidate the (perceived) validity of a legitimacy object. In addition, research on trust has shown that as individuals interact with each other, they develop interpersonal trust and become increasingly willing to engage in risk taking (Cook et al., 2005; Cook et al., 2009). Such risk taking can take the form of revealing personal propriety beliefs to one's counterparts, such that evaluators may become aware of the level of consensus about a particular legitimacy object. All of these insights suggest that evaluators who previously silenced their propriety beliefs may start to voice their concerns and participate in public debates and deliberations. As illustrated in Figure 2 ( $T_1$  and  $T_2$ ), in such contexts evaluators increasingly discern that validity is contested; as a result, the support for an established legitimacy object or institutional arrangement is gradually eroded (Johnson et al., 2006; Oliver, 1992).

However, not all opportunities for communication are equally effective in triggering this process, as distinct streams of research suggest that greater connectivity and repeated social interaction do not *automatically* contribute to the disclosure of a potential incongruity between validity and consensus. For instance, Canales (2016) offered anecdotal evidence that interaction in public forums may not reveal but instead actually perpetuate silencing, and thus, harden incongruity between validity and consensus. Further, small group research has theorized that conformity pressures can lead to 'groupthink', a psychological phenomenon that has been found to promote poor group decisions (Janis, 1972). Groupthink is likely to occur under specific conditions, such as high group cohesiveness, directive leadership, homogeneity of group members' social background, lack of methodological procedures, high stress, and group members' low self-esteem (for a review, see Esser, 1998). These conditions hamper the expression of multiple or contrary viewpoints and the evaluation of viable alternatives. While group decisions are often unanimously accepted as valid and collectively approved, they may mask significant dissent among group members' preferences. From this research, it follows that creating favourable conditions for the expression of dissent can help reduce incongruity between validity and consensus. Hence, 'genuine' communication reveals actual consensus while 'conformist' communication will only stabilize false impressions of unanimous support; and encouraging critique and institutionalizing a culture of speaking up through the implementation of whistleblowing and ombudsman policies will likely help reveal incongruity. Halbesleben and colleagues (2007) concluded that the risk of silencing can be reduced when evaluators are systematically exposed to the true beliefs of other evaluators; for example, through a culture of open communication where conflict is encouraged, not suppressed, and where evaluators are emboldened to disagree with the majority opinion and openly voice their concerns (Brodbeck et al., 2007; Priem et al., 1995).

The disclosure of incongruity between validity and consensus can also be facilitated through the collective action of silenced dissenters who have a predisposition to speak up and engage in institutional change efforts. Research has found that a previously silenced yet unequivocally committed minority of actors can tip a reference group into a new state, in which other group members update their validity beliefs and adapt their propriety beliefs as a result (Centola et al., 2018). Importantly, this dynamic can facilitate the abandonment of socially harmful yet deeply institutionalized practices, such

as female genital mutilation (Efferson et al., 2020), foot binding (Mackie, 1996), and smoking (Christakis and Fowler, 2008). The knowledge that a minority of silenced dissenters can instigate institutional change can also be used strategically, which is lucidly exemplified by Canales (2016): Only when a government agency identified silenced dissenters and coordinated informal meetings was the apparent (but false) support for the status quo revealed and eventually disrupted. In this view, successful collective action in the form of institutional entrepreneurship or institutional work (Lawrence and Suddaby, 2006) does not necessarily require the creation and dissemination of novel viewpoints or a fundamental shift in prevalent frames, narratives, or discourses. Rather, change can be prompted by revealing, organizing, and bringing to the fore hidden or suppressed consent, thereby objectifying the desirability and feasibility of an alternative status quo (Berger and Luckmann, 1967).

### Implications for Theories of Institutional Change

The distinction between validity and consensus highlights that institutional change does not necessarily need to begin with evaluators changing their individual propriety beliefs, as previously theorized by Tost (2011) and implied by several influential works that have mobilized the concept of legitimation/delegitimation to explain institutional change (e.g., Greenwood et al., 2002; Maguire and Hardy, 2009; Suddaby and Greenwood, 2005). Rather, institutional change may be instigated by evaluators interacting with other evaluators to update their perceptions of consensus and eventually change their behaviour on that basis. That is, because validity as an institutionalized perception is ‘not *uniformly* taken for granted’ (Dacin et al., 2002, p. 45; emphasis added), de/legitimation may occur when evaluators develop a more accurate assessment regarding the distribution of propriety beliefs among other evaluators in their reference group (see Figure 1). If evaluators discern that at least some evaluators share their concerns regarding a legitimacy object that they hitherto had perceived as valid, they are more likely to voice their silenced propriety beliefs and to challenge the previously valid but now increasingly contested legitimacy object. In contrast, in a context where evaluators privately endorse a legitimacy object but had silenced their beliefs because they perceived a lack of validity, evaluators are more likely to voice and enact their favourable propriety beliefs when they learn that certain other evaluators hold similar views. For instance, the election of Donald Trump to the U.S. presidency has led some U.S. citizens to voice more openly their dissent with the political establishment, presumably because Trump’s campaign and victory revealed that a significant share of the electorate hold similar critical opinions regarding ‘political correctness’ (Hahl et al., 2018).

As demonstrated by research on threshold models of collective behaviour (Granovetter, 1978; Kuran, 1995) and social influence (Bonardi and Keim, 2005; Watts and Dodds, 2009), it might suffice for a small group, or even a single evaluator, to reveal their deviating propriety beliefs, either through communication or overt action, to meet the threshold level at which other evaluators are willing to disclose their previously silenced beliefs. Gaining increased confidence from the support of others, these other evaluators will be more likely to deviate from what they perceive to be the norm (Schilke, 2018) and express their previously suppressed propriety beliefs publicly. This, in turn may contribute

to further eroding the validity of the status quo while at the same time supporting the legitimation of a novel or alternative institutional order. This dynamic may generate a judgment cascade or 'spiral of empowerment' (Lee and Chun, 2016), in which evaluators increasingly follow the disclosures of other evaluators until a majority of evaluators have disclosed their propriety beliefs. Eventually, these dynamics allow evaluators to discern the actual (dis)approval of a presumably (in)valid legitimacy object. Such cascade dynamics are exemplified by the self-immolation of a provincial fruit vendor in Tunisia and the ensuing discussion of this event on social media which revealed widespread private opposition to a seemingly valid regime, igniting an information cascade and the 'revolutionary bandwagon' of the Arab Spring (Goodwin, 2011, p. 453).

In addition, as indicated in Figure 2 ( $T_2$ ), evaluators who had favourably assessed the legitimacy object's propriety prior to a judgment cascade will be exposed to the erosion of the once-dominant validity assessment. They will recognize that the apparently broad-based consensus was merely presumed rather than real. This realization may lead these previously supportive evaluators to reassess and update their propriety beliefs, and act on that basis (Tost, 2011). Indeed, exposure to minority opinions can be surprisingly powerful in leading people to change their views (Wood et al., 1994), even if they had previously been advocates of the majority opinion. For that reason, the greater public visibility of formerly silenced judgments can influence the propriety beliefs and behaviours of evaluators who previously endorsed the now increasingly invalidated legitimacy object. The insight that the disclosure of silenced propriety beliefs can trigger cascade dynamics has also important implications for policy. In order to devise effective interventions (e.g., aimed at deinstitutionalizing a harmful practice), policy makers need to take into account not only the distribution of propriety beliefs, but also how threshold levels at which evaluators start disclosing their beliefs are distributed in a community of evaluators and to figure both direct and indirect effects of legitimacy judgment cascades into their interventions (see Efferson et al., 2020).

To conclude, the distinction between propriety, validity, and consensus as well as our discussion of the role of social influence and coercion in legitimacy judgment formation offers a new window into understanding the legitimacy dynamics that precede institutional change. Whereas previous models of institutional change have often used individuals changing their propriety beliefs, either in response to exogenous shocks, institutional contradictions or individuals' reflexivity, as their starting point (Greenwood et al., 2002; Tost, 2011), our account theorizes institutional change being triggered by resolved misconceptions regarding the pattern of other evaluators' beliefs. Acknowledging that validity and behavioural conformity may conceal private dissent and that macro-level legitimacy may be inherently fragile thus offers a crucial insight to legitimacy theory, which thus far has treated validity and consensus as essentially synonymous. Given that theoretical and methodological developments are inherently intertwined (Greenwald, 2012), our theoretical considerations have important implications for empirical research, a point we elaborate next.

## ADVANCING LEGITIMACY RESEARCH WITH EXPERIMENTS

Haack and colleagues (2020a) suggested that the trajectory of institutional research can be interpreted as the result of *theory-method co-evolution* (Greenwald, 2012), with the

advancement of the field depending on a self-enforcing and continuous cycle between theory development and empirical research aimed at testing and consolidating new theory. In this view, the development of appropriate research designs and measurement approaches is crucial for the advancement of legitimacy theory. Having established the key conceptual distinction between three components of legitimacy, a second important goal of our paper is hence to offer some guidance for future *empirical* research that elucidates the intricate relationships between propriety, validity, and consensus, particularly with respect to the antecedents and consequences of the incongruity between validity and consensus. We believe that conventional methodologies may not be well-equipped to disentangle distinct legitimacy components and their complex interactions. Traditionally, legitimacy has often been approximated through crude indirect measures such as population density or number of adoptions.<sup>[5]</sup> However, not only are such proxies problematic because they leave open alternative explanations unrelated to legitimacy, but more specifically, they are often unable to capture individual evaluators' perceptions. Research has also relied heavily on correlational designs and text-analytical approaches which tend to be inadequate for developing a theory of the inter-subjective and socio-cognitive processes that underlie legitimacy (Haack, 2012). As a result, extant research and measurement approaches cannot effectively differentiate between the legitimacy components and the intricate relationships between these components, and they are of limited utility in explaining or predicting the occurrence of unanticipated institutional change.

As a solution to this problem, we encourage researchers to embrace experimental designs more frequently while employing appropriate individual-level measures for legitimacy such as those that clearly distinguish between propriety and validity beliefs as suggested by Haack and Sieweke (2020). Given their unique ability to identify cognitive processes at the individual level that would be difficult to study with other methods, experiments offer a highly attractive approach to rigorously and consistently studying the relationships between propriety, validity, and consensus and their relevance in the context of institutional change (Schilke et al., 2019). Especially when investigating socially endogenous inferences (where evaluators consider the opinion of other evaluators when forming their own judgments), experiments offer the important advantage of ruling out alternative explanations and isolating factors of theoretical interest, as demonstrated by experimental research in sociology (e.g., Correll et al., 2017; Schilke and Rossman, 2018), psychology (e.g., Paluck and Shepherd, 2012; Zou et al., 2009), and behavioural economics (e.g., Allcott, 2011; Hallsworth et al., 2017). We thus believe the time is ripe to bring experiments to the core of legitimacy research in organization theory.

In social science research, the term 'experiment' refers to the random assignment of units of analysis (typically human participants) to different groups (e.g., Shadish et al., 2002). Given that groups vary only with respect to the manipulated variable (the 'treatment variable'), changes in the outcome variable can be attributed to the manipulation. Experiments have a number of important advantages (Bitektine et al., 2018; Stone-Romero, 2009); namely, they enable causal inference, they allow the researcher to control for the influence of external variables, and they help the researcher explore the parameters of complex constructs. It may thus not be surprising that we are currently witnessing a significant increase in experimental research, particularly in institutional theory (Bitektine et al., 2018). Following up on Zucker's (1977) early experimental work

studying the effects of institutionalization on cultural persistence, more recent experimental investigations have demonstrated the rapid institutionalization of price bubbles (Levine et al., 2014), experimentally manipulated institutional complexity (Raaijmakers et al., 2015), institutionalized belief systems (Hafenbrädl and Waeger, 2017), political ideologies (Jasinenko et al., 2020), and various types of institutional logics (Glaser et al., 2016). Recent investigations have also tested the effects of organizational identity on resistance to institutional pressures (Schilke, 2018). However, with the exception of the landmark study by Elsbach (1994) and a recent investigation by Jahn and colleagues (2020), organization and management scholars have yet to embrace experimental designs in legitimacy research.

We see an opportunity for ‘retooling’ and an untapped potential to capitalize on experiments to improve the understanding of legitimacy that we advance in this paper – as a multi-level process comprising distinct legitimacy components. In this section, we offer three separate yet interrelated experimental designs, all of which seek to examine the interactions among propriety, validity, and consensus and to improve our knowledge of the inter-subjective processes of perception, interpretation, and interactions that establish the core of a multi-level understanding of legitimacy. All three designs are specifically geared towards developing a better understanding of the role of consensus in the legitimacy processes preceding institutional change. While we can only sketch selected aspects of these designs, we are hopeful that even a rough outline can inspire legitimacy researchers to pursue these or similar approaches in the near future, in an effort to help build strong and relevant theory.

To ensure that the internal validity of experimental research is not threatened we recommend unexperienced experimentalists to study best-practice suggestions for experimental methods (e.g., Aguinis and Bradley, 2014; Lonati et al., 2018). We also suggest that researchers develop a thorough understanding of the role of deception in experimental research. Given that our theory focuses on the antecedents and consequences of collective misperceptions and the role of communication in the formation and dissolution of these misperceptions, deception may be a useful or even necessary element in future experimental work on legitimacy. However, there are stark differences between psychological and economic research traditions with respect to the acceptability of deception. While psychologists and sociologists tend to see deception as a legitimate tool in experimentation whenever it would be practically impossible to run a study without (Cook and Yamagishi, 2008; Smith and Richardson, 1983), laboratories in behavioural economics enforce bans on deceiving subjects and there is a strong professional norm among economists that employing deception in experiments is unethical, making them de facto unpublishable (Dickson, 2011). Experimental procedures involving deception in economics-oriented schools and programs thus may require a convincing justification for approval by ethics committees.

## Survey Design

The first suggested approach consists of a set of survey experiments to examine the effect of perceived validity and consensus on propriety beliefs. This design builds on and extends previous works in sociology that have focused on the relationship between



validity and propriety (e.g., Johnson et al., 2016; Massey et al., 1997; Walker et al., 1988). Survey experiments embed the experimental manipulation within a conventional survey, through which researchers may also gather individual-level characteristics of participants for use as additional predictor variables in the data analysis. Survey experiments combine some of the benefits of surveys with those of experiments: they have a high degree of internal validity because the experimental element allows researchers to randomize assignment to conditions and control variables of interest. At the same time, survey experiments can also have a high degree of external validity because the use of web platforms and vignettes (such as realistic news stories invented specifically for the purposes of the experiment) increase the similarity between the experimental situation and everyday experiences (Aguinis and Bradley, 2014; Finch, 1987).

Based on the theoretical notions developed above, we posit that the formation of propriety beliefs regarding a legitimacy object is contingent on both the perceived validity of that object and the degree to which it is consensually regarded as appropriate for its social context. Specifically, it can be assumed that propriety beliefs are likely to be revised and also disclosed in contexts characterized by high validity and low consensus, because a lack of consensus casts doubt on whether legitimacy objects perceived as valid represent an objective and collectively approved fact (for a related argument in a field setting, see Haack et al., 2020b).

Based on this reasoning, we suggest that scholars could conduct survey experiments to test the causal relationships between validity, consensus, and propriety. A first type of study could employ a 2 (validity: high vs. low)  $\times$  2 (consensus: high vs. low) between-subjects design, in which the experimenter randomly assigns participants to a condition and presents one of four versions of a vignette about the focal legitimacy object. Validity and consensus could both be manipulated in the vignette. A major source of validity is authorization by high-status actors, granting a legitimacy object the status of a social fact (Johnson et al., 2006). Consensus, on the contrary, indicates that evaluators within a given reference group agree that a legitimacy object is appropriate for its social context. The vignette could thus indicate (1) that a legitimacy object is either supported or criticized by an important authority (validity manipulation) and (2) that the relevant reference group is either characterized by significant agreement or disagreement with regard to the appropriateness of the focal legitimacy object (consensus manipulation). For instance, the 'high validity/low consensus' condition would highlight that although a legitimacy object is strongly supported by an authority (and is thus high on validity), social approval is not unanimous and significant dissent exists among other evaluators regarding the acceptability of the legitimacy object. The manipulation of consensus could be implemented graphically through the display of differently shaped opinion distributions, not unlike those shown in Figure 1 above. For instance, a single-peaked distribution with low variance would represent a high-consensus condition, whereas a double-peaked distribution with the same mean value but much higher variance would represent a low-consensus condition (e.g., Martin et al., 2016, p. 1461).

In line with prior research in sociology (e.g., Hegtvedt and Johnson, 2000; Schilke and Rossman, 2018; Walker et al., 1988), we expect that validity strengthens propriety (bolstering effect) and reduces or even neutralizes perceptions of impropriety (cancelling effect). The two effects need to be separated, as previous research has suggested

that propriety (and legitimacy more generally) can be conceptualized as a bipolar construct, meaning that it ranges from positive propriety to negative propriety (impropriety) (Hudson, 2008; Suddaby et al., 2017). Consistent with the work of Haack and colleagues (2020b), we expect these effects to be stronger within high-consensus conditions, as participants are more likely to follow their validity beliefs (i.e., their beliefs about what others believe) and to hide their propriety beliefs in these contexts. That is, if an evaluator holds unfavourable propriety beliefs about a valid legitimacy object (e.g., a hierarchical system or status order) and also knows that this object is unanimously approved (i.e., consensus is high), that evaluator will be less likely to voice unfavourable propriety beliefs and more likely to adapt his or her propriety beliefs over time (strong cancelling effect). Meanwhile, if an evaluator holds a propriety belief that is consistent with the level of perceived validity, a high-consensus condition will further strengthen the evaluator's propriety belief, and he or she will be more likely to voice the judgment openly (bolstering effect). Finally, under conditions of low consensus, we expect that participants will pay less attention to validity and be more likely to reveal what they personally consider appropriate.

### **Deliberation Design**

A second, and particularly promising, opportunity to advance knowledge of the role of consensus in the legitimacy processes preceding institutional change is to draw on the experimental study of deliberations to examine whether and how communication may alter the dynamics underlying the interactions among propriety, validity, and consensus. Deliberation can be defined as 'mutual communication that involves weighing and reflecting on preferences, values and interests regarding matters of common concern' (Mansbridge, 2015, p. 27). Importantly, deliberation designs have the advantage of combining the 'internal validity provided by experimental design, the external validity provided by actual deliberation about real-world issues, and the generalizability provided by surveys' (Carpini et al., 2004, p. 333). Suddaby and colleagues (2017) further stressed that deliberation settings allow for the identification of supra-individual aspects of cognition, and thus, help addressing the issue of how everyday practices and conversations create inter-subjectively shared typifications for a given reference group (DiMaggio, 1997). Deliberation designs, therefore, facilitate the empirical investigation of the negotiations and struggles underlying both the production of validity and the silencing of propriety beliefs in processes of (de-)legitimation (Suddaby et al., 2017).

Specifically, future research could elaborate the conditions under which deliberation helps to reveal vs. perpetuate a non-disclosed incongruity between validity and consensus. That is, what are the factors and circumstances through which deliberation objectifies validity beliefs about a legitimacy object (constituting validity) while silencing inconsistent propriety beliefs (lowering perceived consensus)? Conversely, scholars could aim to identify the conditions under which deliberation deobjectifies validity beliefs (constituting invalidity) and contributes to the disclosure of incongruities and silenced propriety beliefs (raising perceived dissensus).<sup>[6]</sup>

The starting point of a research agenda premised on deliberation designs is the insight developed in this paper that validity often involves the appearance of consensus rather than actual consensus. While apparent consensus may mirror actual consensus

with relative accuracy, it is important to point out that a legitimacy object can be valid and objectified, and thus, can induce a sense of obligation that guides behaviour, when its acceptance is 'assumedly shared' by others in a social group (Suchman, 1995, p. 574). As discussed above, validity can thus be based on 'false consensus', or a misperception of the propriety beliefs prevalent within a reference group. Even if the majority of evaluators hold unfavourable propriety beliefs about a legitimacy object (meaning only a few evaluators privately endorse it), this object can still be perceived as highly valid if these evaluators falsely assume that most evaluators in their group believe that this object is proper. The belief in the validity of a legitimacy object can thus exist as a social fact and can guide behaviour even in the presence of weak consensus. As discussed in greater detail above, this kind of misperception is more likely to occur when the ties among the members of a group are weak and trustful communication is sparse, which makes it difficult for individual evaluators to detect the actual or 'true' beliefs of others. In turn, denser network ties and the possibility of communicating openly with group members in public deliberation can reveal that validity is based on an illusion of support, making it more likely that evaluators will disclose their actual propriety beliefs, leading to the deobjectification of validity.

There are manifold opportunities to further examine dynamics of (de)objectification in the controlled setting of a deliberation experiment. For instance, researchers could draw on a design developed by Schnider and colleagues (2020) and measure the impact of communication on changes in propriety beliefs by employing a difference-in-differences design, where treatments vary with respect to the degree of validity (e.g., through expert endorsements). In such a design, within-subjects differences in propriety measures would be surveyed before and after discussions and compared between the treatment and control conditions. In the treatment condition, participants would discuss the focal legitimacy object (e.g., a controversial organizational practice) with experts (constituting the source of validity), while in the control condition participants would discuss the focal legitimacy object amongst themselves without experts. To ensure that the endorsement or critique of the focal legitimacy object follows a predefined script in group discussions, the researcher could hire professional actors and employ standardized scripts, which would control for variance in idiosyncratic characteristics, such as attractiveness or persuasiveness (e.g., Jacquart and Antonakis, 2015). If executed well, the involvement of scripted actors may not comprise mundane realism while contributing to the experience of the deliberation as an authentic and natural interaction for all participants. In addition, participants would receive a standardized welcome address, which introduces the topic to be discussed, invites them to make an effort to justify propositions and considerations, and emphasizes the importance of mutual listening (Baccaro et al., 2016). Another opportunity to study the dynamics of (de)objectification is the manipulation of group consensus. In this type of design, researchers could assemble the deliberation groups based on pre-tested propriety beliefs to match a specific propriety belief distribution (see Figure 1). This design embraces the complexity of the variety of real-world propriety distributions and could help understand which propriety distributions bolster or harm the silencing effect of validity. All deliberations should be mediated by trained moderators. These would lead the discussion as an essentially free conversation among the participants, whereby they manage the time, open and close the

discussion, and make sure that no single participant either dominates the conversation or refrains from talking entirely.<sup>[7]</sup> Deliberations could be videotaped and coded for relevant behavioural patterns and interaction dynamics to triangulate self-reported information.

### Storytelling Design

Finally, another promising approach is to examine whether validity, propriety and consensus influence how and why some stories develop and persist over time while others fall out of favour. Storytelling adds an important temporal element to the legitimacy research described above and shifts the focus to the stories actors construct to make sense of controversial legitimacy objects or issues. Further, storytelling is a key way in which cultural and institutional knowledge is transmitted over time (Lounsbury and Glynn, 2001). Stories are passed down from parents to children, from managers to new employees, and from newspapers to the public. Stories are, therefore, among the most powerful mechanisms for creating and maintaining legitimacy. While stories often are preserved as they are passed from person to person, they can also change. We suggest dynamics of storytelling are particularly important in contentious and complex contexts, such as those surrounding a controversial legitimacy object, where the stories people choose to tell may help determine the momentum and eventual outcome of critical decisions.

Here, we propose a set of laboratory experiments that are based on serial reproduction research in cultural psychology (Clark and Kashima, 2007; Lyons and Kashima, 2003). In this design, which is sometimes called ‘the telephone game’, participants receive information and are asked to then share that information in their own words with another person, in a chain of four people. We recommend this design to examine the conditions under which participants either seek to reproduce a dominant story about the focal legitimacy object (Story A) or seek to introduce changes to this story given the existence of a competing story (Story B). Our baseline argument is that participants will, in general, tend to reproduce Story A whenever validity and propriety pressures exist. However, participants will be likely to introduce changes to this story under a specific combination of conditions. Specifically, when participants perceive that Story A will likely be rejected by their group (i.e., validity for story A is perceived to be weak) and they themselves hold discrepant beliefs (i.e., unfavourable propriety beliefs) with regard to Story A, they will be more likely to introduce new information from Story B into their overall communications. What this suggests is that a story’s reproducibility is driven primarily by a belief that the collective will buy into the veracity of this story and, even when this is not the case, by the personal belief that this story is true. Only when these conditions do not hold will stories change.

In this type of serial reproduction experiment, participants would receive some information about the focal legitimacy object through Story A, followed by information about whether or not the participant with whom they will be communicating will endorse this story (validity belief manipulation: peer endorsement vs. peer rejection). Participants would be surveyed to gauge their personal level of endorsement (propriety belief measure). They then would be given a newspaper article that offers equivalent information about Story A and Story B. The experimenter would then ask the participant to write a summary of this news article for the next person to read. The core outcome measure

would be the amount of Story-A-consistent information in relation to the amount of Story-B-consistent information provided in the participants' written summaries. Our expectation is that the only time where the amount of Story B information would increase relative to Story A information is when a participant believes that the participant he or she is communicating with will not endorse Story A and when this participant himself or herself also has a lower level of endorsement for Story A.

We suggest including four participants in each reproduction chain. To control for order effects, a second set of four participants would start with Story B (counterbalancing). Thus, this study would employ a 2 (validity: low vs. high)  $\times$  2 (sequence: starting with A vs. B) between-subjects design with three measurement points (the stories of participants 2, 3, and 4). To ensure variance in propriety beliefs, the researcher could pre-select participants to ensure that the subject pool is diverse in terms of propriety beliefs about a certain story (i.e., recruiting an equal number of individuals holding either favourable or unfavourable propriety beliefs). This would make it possible to build ideal-typical chains (a 'supportive' chain comprising individuals with favourable propriety beliefs vs. a 'critical' chain comprising individuals with unfavourable propriety beliefs). Varying the composition of chains ('supportive' vs. 'critical') would allow manipulating the construct of consensus (i.e., the actual agreement that exists within a reproduction chain). As a 'supportive' chain resembles the notion of echo chambers discussed in social media research, study results may generate insights about political polarization and ways to overcome it. Moreover, research drawing on this kind of storytelling design has important practical implications regarding the way governments, media, and the public create spaces in which people feel safe to express discrepant beliefs about controversial issues.

## Measurement

Propriety beliefs could be measured using a pre-tested and validated item battery (e.g., Alexiou and Wiggins, 2019). However, given that evaluators may silence their propriety beliefs when they perceive them to be inconsistent with validity, measurement instruments based on self-reports may, due to social desirability effects, capture only validity beliefs (Haack and Sieweke, 2020). While the attention to validity beliefs is not a methodological artifact but much in line with what we would expect theoretically, the question arises how scholars can measure *silenced* propriety beliefs. Indirect or 'implicit' measures of propriety beliefs, including techniques such as the implicit association test and evaluative priming, may complement 'explicit' self-report measures (see, e.g., Humphreys and Latour, 2013). In addition, conjoint analysis can help reduce the social desirability and retrospective reporting biases sometimes associated with explicit measures (Siraz et al., 2019). Besides explicit and implicit measures of propriety, scholars may also consider integrating a behavioural correlate – for example, by asking participants about their willingness to make a donation to the focal legitimacy object or a specific cause related to the legitimacy object (Haack and Sieweke, 2020). Indeed, even though legitimacy research suggests a direct link between legitimacy judgments and behaviour, it has rarely tested this link in the controlled setting of an experiment (Gruban and Légeret, 2020).

## DISCUSSION

### Contributions

This article paired theory development with methodological recommendations to make two important contributions to legitimacy research. First, we delineated three distinct legitimacy components – propriety, validity, and consensus – that operate at different yet highly interdependent levels of analysis – micro, macro, and meso – and explained why future research on legitimacy should be structured around these three components. While propriety and validity have received growing attention in legitimacy research (e.g., Bitektine and Haack, 2015; Tost, 2011), the meaning and role of consensus has often-times been ignored or treated only tangentially. In fact, legitimacy scholars have often conflated the concepts of validity and consensus and failed to define and differentiate the latter. To address this problem, we clarified that validity denotes an institutionalized, collective-level perception of appropriateness for a given social context, whereas consensus is a meso-level construct that describes the degree of agreement in evaluators' propriety beliefs. Separating validity from consensus, therefore, offers a crucial correction to earlier work (e.g., Bitektine and Haack, 2015) that erroneously implied that validity and consensus reflect one and the same construct.

Our clarification advances the multi-level conception of legitimacy and has important implications for theories of institutional change. Specifically, whereas much prior research has portrayed validity as virtually impervious to change, our theory highlights that validity and the taken-for-granted aspects of institutions can be inherently fragile whenever consensus is low. Such low consensus may oftentimes not be apparent, because evaluators have little reason to openly voice propriety beliefs that are not congruent with a legitimacy object's validity. However, trustful communication among evaluators and collective action may make low consensus visible and reveal the prevalence of dissent, with the result that evaluators who hold minority opinions will be more likely to publicly disclose their propriety beliefs. In turn, the disclosure of the once concealed propriety beliefs will affect the judgments and behavioural dispositions of other evaluators. As illustrated in Figure 2, these dynamics may lead to a judgment cascade that prompts the problematization, delegitimation, and ultimately, the decline of a previously valid legitimacy object. At the same time, delegitimation may give room to the legitimation of an alternative institutional order, contributing to the process of institutional change. Importantly, our research clarifies that institutional change does not necessarily start with intra-individual change in propriety beliefs, as has often been implied in extant scholarship (e.g., Greenwood et al., 2002; Tost, 2011). Institutional change can also be instigated when evaluators become able to gauge how propriety beliefs are distributed in their reference group and to identify a critical mass of like-minded evaluators who are willing to disclose their dissenting beliefs and engage in institutional change efforts. Importantly, this account offers a viable approach to addressing the contested issue of embedded agency by explaining why individual actors are capable of stepping out of the current institutional order (Cardinale, 2018; Harmon et al., 2019).

Second, our paper draws attention to the need to broaden the methodological toolkit to advance empirical research on the perceptual components of legitimacy. Experimental

designs allow researchers in institutional theory to approach legitimacy in a new way – as a process of social judgment formation that is subject to the evolving cognitions of, and pressures on, the human evaluator, rather than merely as a fixed characteristic or asset of organizations that contributes to organizational growth and survival (Deephouse and Suchman, 2008). We maintain that an experimental research program will help examine legitimacy as an *explanandum* and phenomenon in its own right, specify and test its causal determinants, corroborate (or refute) the assumptions on which much of the multi-level research on legitimacy is based, and ultimately empower researchers to advance their understanding of micro-institutional processes (Zucker, 1991, p. 104; also see Zucker and Schilke, 2020).

### **Experiments: The Promise and the Challenge**

Experiments constitute a powerful means of establishing causal inferences and are often considered the ‘gold standard’ of science (Coleman, 1990). However, in private conversations with colleagues, we frequently sense a concern that experiments may reinforce empiricism and a positivist epistemology that emphasizes the existence of an objective and measurable reality, in contrast to an interpretive epistemology, which postulates that knowledge derives from the subjective interpretation of reality (Morgan and Smircich, 1980). Our view, however, is that experiments that are carefully designed and interpreted are capable of supporting a holistic and more sophisticated view that acknowledges the inherently contextual foundation of human cognition and behaviour (DiMaggio, 1997). In this sense, experiments have significant potential to strengthen the social-constructionist roots of institutional theory, reinvigorating and extending earlier works of Zucker (1977), Garfinkel (1967), and others.

Although we are not the first to encourage the greater use of experimental designs in institutional research, implementing such a research agenda has remained challenging. A major difficulty may stem from a lack of familiarity with relevant experimental methods in the organization theory community. As David and Bitektine (2009) argued, institutional researchers may need training in experimental designs, which may require them to collaborate with colleagues from disciplines such as marketing, psychology, and organizational behaviour. Indeed, engaging in more intense dialogue and interdisciplinary collaboration could prove highly fruitful in that it would help scholars integrate sociological and psychological perspectives of institutional phenomena (DiMaggio, 1997; Zerubavel, 1997; Zucker and Schilke, 2020). This also means that legitimacy researchers need to overcome old habits, look beyond short-term incentive structures, and make a deliberate effort to gain experience in experimental methods (Haack et al., 2020a). In the words of Bitektine (2009), scholars have to evolve from ‘method specialists’ – that is, researchers who are constrained by a narrow set of methods – into ‘domain specialists’ – that is, researchers who apply ‘more diverse, but sometimes less “legitimate” (and therefore, more “risky”) research methods to address research questions that cannot be explored through “more legitimate” methods’ (Bitektine, 2009, p. 219).

Another potential obstacle to establishing an experimental research agenda is that the application of experiments requires variables of interest, and clearly specified causal relationships among these variables, that are suitable for standardized operationalization

and external control (McKinley, 2007). This means that legitimacy scholars need to clarify and refine the definitions of key constructs and identify the scope conditions under which the proposed effects are likely to hold (Suddaby, 2010). By drawing on Suchman (1995), legitimacy scholars have regularly defined legitimacy rather broadly, and, possibly as a result, the construct has been measured in a variety of ways that have contributed to increasing the range of meanings associated with it. Closely following Suchman's (1995) encompassing definition may have been detrimental to the advancement of legitimacy theory and perhaps institutional theory as a whole. To reach a better understanding of legitimacy in institutional theory, researchers need to specify more precisely the perceptual components of legitimacy and their relationships. In Hirsch and Levin's (1999) words, we believe the time is ripe in the evolution of legitimacy research for umbrella advocates to give way (at least in part) to validity police in order to avoid a construct collapse. Enhancing construct clarity (rigor) will be also instrumental to have a meaningful impact on practice (relevance), as a multi-level theory of legitimacy with a clear differentiation of its perceptual components brings us closer to the reality and complexity of legitimacy dynamics within and about organizations (Haack et al., 2020a).

### **Future Research and Implications for Related Literatures**

We see ample opportunities to advance our understanding of legitimacy by drawing on the context of social media. The rise of social media as a heterogeneous and co-produced environment changes how social judgments about organizations are produced and disseminated (Etter et al., 2019) and can provide important insights into cascade dynamics underlying sudden and unanticipated institutional change. For instance, tracking the emergence and spread of new Twitter hashtags may help flag abrupt institutional change so clearly that they make excellent classroom examples, and can also provide visible evidence of cascades that reinforce legitimacy, destroy it, or create something new. Sometimes the Twitter sequences include, as part of the message stream, the older content that is being replaced, and associate it with relevant Twitter actors. Here, tracks of related messages can expose otherwise hidden pervasive behaviour that is seen by one subset of actors as illegitimate, and as costly to change by another, such as repeated predatory sexual behaviour in the movie and photography industries. The speed of change in response to these Twitter revelations, when confirmed by multiple high-status actors, lies visible for all to see. From recounting personal experiences to later court cases, the mechanisms for institutional change are laid out and can be subjected to research. YouTube and news organizations often produce similar streams of delegitimation processes at work.

Similarly, mechanisms that maintain or reinforce different forms of sexism, ethnic targeting, and racism can be exposed, studied, and alternatives producing positive, ameliorating changes identified. For Zucker (2019), this visibility of action helped her to informally test her idea that legitimacy, and the related institutional order, can undergo sudden redefinition (see also Zucker and Darby, 2020). From one day to the next, what was accepted with only secret, veiled comment becomes part of a pressure campaign that leads to firing, company bankruptcy, court cases and prison sentences. The cascade of revealed and documented actions, unknown when previously concealed, is successfully



defined as illegitimate, and that redefinition quickly produces real effects. While it might be possible to design a quasi-experiment using data from Twitter, YouTube or newspapers for research purposes, the control of true experiments as we outline them in the section above is invaluable at this stage of theoretical development. After legitimacy scholars identify the relevant causal chains via experiments, other exploration as above would help establish the range of conditions under which these processes take place outside of the lab. Diving back into the lab for confirmation at the end might become second nature to most researchers.

While our article primarily contributes to the literature on legitimacy and institutional change, its insights into the concept of consensus are likely to be relevant for several adjacent literatures. In fact, the general notion of consensus is not unique to the study of legitimacy, but may be of great importance whenever certain perceptions can be collectively held among members of an entity (Bowman and Ambrosini, 1997). Hence, our theorizing has the potential to contribute to research on related types of social evaluation, such as corporate reputation (Lange et al., 2011), status (Piazza and Castellucci, 2014), or stigma (Devers et al., 2009). Scholars have often treated these types of evaluations as collective-level constructs that reflect public recognition and social approval, and are just beginning to examine the role of individual-level judgments in the process through which an organization's collective-level approval forms and changes (Haack and Sieweke, 2020).

Perhaps most notably, scholars interested in trust have started to theorize the role of consensus in the context of studying trust dynamics (Brattström et al., 2019; Schilke and Cook, 2013). One key finding from that literature is that substantial dissensus may exist whenever multiple actors form trust perceptions of a particular target, with some placing considerably higher trust in it than others (Klein et al., 2000). The mechanisms explaining such variations in consensus among individual trustors, as well as the consequences of trust consensus, are at the forefront of this inquiry (de Jong et al., 2017, 2020). While our article shares an interest in these topics, it introduces important novel aspects of consensus that have yet to be considered by trust scholars and that could aid in developing a more nuanced understanding of how consensus may shape trust dynamics. For example, extant trust scholarship mostly assumes that actors either have knowledge of others' trust perceptions or they do not, but the possibility and implications of false impressions of others' trust perceptions have not yet been examined, even though trust misperceptions are likely to exist widely (Campagna et al., 2019). Our theorizing about validity-consensus congruity may offer a useful starting point. Further, while our discussion of Figure 1 emphasizes the need to move beyond average consensus levels, how trust beliefs are distributed and whether distinct distributions may have unique consequences has not yet been addressed by trust scholars (see de Jong et al., 2020 for a recent exception).

## CONCLUSION

In this article, we illuminated the complex relationships between the propriety, validity, and consensus components of legitimacy and highlighted that disentangling validity from consensus allows for improved theorizing of the legitimacy processes that precede

sudden and unanticipated institutional change. We believe that future research on legitimacy needs to be structured around these three components in order to move forward. Our proposal of conceiving legitimacy as a multi-level process and the elaboration of relevant experimental designs to study this process aims to contribute to such an ambitious research agenda. Our suggestions, which are meant to offer both programmatic and pragmatic advice, thus, represent only the beginning of a long journey. We would be delighted if you considered joining this effort.

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## NOTES

- [1] It is important to note that the legitimacy components of propriety, validity, and consensus are distinct from, and must not be confused with, the ‘dimensions’ of legitimacy. Approaches to conceptualizing the dimensions of legitimacy range from two-dimensional (e.g., Aldrich and Fiol, 1994; Ruef and Scott, 1998) to three-dimensional (e.g., Huy et al., 2014; Suchman, 1995; Tost, 2011) and four-dimensional (e.g., Walker et al., 2014). Other studies address issue-specific types of legitimacy, such as corporate environmental legitimacy (Bansal and Clelland, 2004) or more idiosyncratic conceptions of legitimacy (e.g., Higgins and Gulati, 2006; Human and Provan, 2000). Each dimension or type of legitimacy can be conceptualized as comprising propriety, validity, and consensus components.
- [2] Please note that important aspects of the consensus construct were co-developed in Haack et al., 2020b.
- [3] Note that consensus can describe the agreement regarding favourable or unfavourable propriety beliefs. By default, we conceptualize consensus such that it describes the agreement regarding favourable propriety.
- [4] Systems that are highly institutionalized may breakdown and delegitimize before construction of new systems. Revolutions, both in government and in science, often share an ‘act first, legitimate later’ character.
- [5] For density measures, see Baum and Powell, 1995; Zucker, 1989; for indirect measures of adoption motivation, see Donaldson, 1995; Vergne, 2011; for text-based measures, see Etter et al., 2018; Haack, 2012.
- [6] By ‘objectification’ we refer to the development of an objective and valid external reality that is largely independent of the subjective internal states of individual evaluators (Berger and Luhmann, 1967; Tolbert and Zucker, 1996). Conversely, ‘deobjectification’ refers to the development of an objective external reality that is increasingly subjective and dependent on the private propriety beliefs of evaluators (Wood and McKinley, 2017).
- [7] A deliberation experiment cannot fully match the internal validity and control of confounders that other experimental approaches afford. In particular, researchers cannot enforce deliberation on participants: while some participants may actively participate in deliberations, others may mainly listen without saying much (‘lurkers’). Non-compliance becomes particularly relevant when deliberation effects are not monotonic, that is, participants contributing actively to the discussion (‘activists’) experience stronger shifts in propriety beliefs than ‘lurkers’. Researchers could address this crucial problem in a twofold way: on the one hand, the involvement of moderators could help to reduce the number of ‘lurkers’ by directly asking them to participate; on the other hand, the causal effect of validity and consensus in deliberation could be estimated by employing the so-called Complier Average Causal Effect approach (Angrist et al., 1996).

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