Invoking "Alphonse:" The founder figure as a symbolic resource in organizational identity work and strategic change

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Abstract

There has been growing interest in the rhetorical use of history in organizational discourse. Yet, the role of the founder figure in such discourse has not so far been the specific focus of research. In the present study, we analyze archival data from the internal magazine of a large financial cooperative over the 80 years of its publication from 1935 to 2015 to examine the ways in which the "founder figure" (deceased in 1920) is used over time and at critical junctures in the organization's life to reformulate, maintain, strengthen, or revise organizational identity and to legitimize or potentially constrain organizational renewal. Drawing on the notion of "presentification" from communication theory, we identify two modes of *e*vocation and five modes of *in*vocation that describe the ways in which the founder is "made present" to accomplish different purposes. We also show how these modes become operative during major change periods. We argue that presentification of the founder serves as a symbolic resource for rhetorical history, a mechanism of imprinting whose effects are cumulative and dynamic, and a source of stability and continuity underlying major change and transformation.

Key words: organizational identity work, symbolic resources, founder figure, presentification, Desjardins, uses of the past

Today, in 2012, which has been declared the International Year of Cooperatives by the United Nations, it seems especially important and relevant to revisit the thoughts of Alphonse Desjardins. This is all the more true as our current context is in some important respects reminiscent of the one in which the first caisses [credit union branches] were founded (…).

I also had a very personal reason for putting together this book. I always like to lay out principles and signposts so that in the heat of the action, I never lose sight of what matters most. At Desjardins, the vision of our founder must remain one of our main sources of guidance, along with our mission, our cooperative values, and the strategic orientations that we adopt together.

Monique Leroux, President of the Desjardins Group, Introduction to *Alphonse Desjardins: A Vision for Today's World,* Les Éditions Dorimène, 2012.

In the quotation above, Monique Leroux, President of the Desjardins Group, a large financial services cooperative with CAN $ 229 billion in total assets and 45,966 employees in 2014, invokes the founder Alphonse Desjardins (1854-1920) and his vision as one of her "main sources of guidance" even though the founder died 92 years prior to the publication of the book of quotations she authored in his honor, and even though the small locally-based credit union system he founded in 1900 has evolved to become a massive and complex financial institution quite different from what the founder could conceivably have imagined. Yet, although no longer of this world, Alphonse Desjardins is still a shadow presence inhabiting the fabric of the organization, and in particular the organizational identity and strategy discourse of its senior managers.

Illustrating further his shadowy presence, at the end of a blog post on the Desjardins Group website announcing a major acquisition on January 15th 2014, we find the following words: *"Desjardins Group continues to expand in Quebec, across Canada and around the world. It was Alphonse Desjardins himself who started developing business outside Quebec by establishing caisses in Ontario.[1]"* The blogger thus signals that the expansion created by a new acquisition is in continuity with the founder's vision, implying that he would probably have approved. Similarly,

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[1] https://blogues.desjardins.com/between-us/2014/01/desjardins-fast-tracks-development-in-ontario-alberta-and-new-brunswick.php; consulted 18th August 2015

in another part of the website, we find Alphonse Desjardins mentioned again in an article explaining a recent move to close down Service Centres in small communities, *"We often forget this, but in his lifetime, Alphonse Desjardins witnessed the closure of 44 of the 187 caisses he founded, because the context could not support a strong presence of a financial cooperative.[2]"*

The mobilization of the founder in organizational discourse is clearly not limited to this particular case. For example, Boje (1995) describes the multiple ways in which Walt Disney's name was invoked in official and unofficial discourse, while Smith and Eisenberg (1987) show how references to "Walt" ironically became a resource for union members in their fight against the company. Hansen (2012) notes how a slogan ("constant care") coined by the founder of the Danish Maersk Group inhabited the business for decades. Even Carly Fiorina, the ill-fated CEO of Hewlett-Packard whose attempts to transform the company resulted in her dismissal, regularly referenced the founders Bill Hewlett and Dave Packard and the "HP Way,"[3] although in this case, her invocations backfired because they were perceived as inauthentic by observers (Abcarian, 2015; Elsbach, Stigliani, & Stroud, 2012; Paroutis, Mckeown, & Collinson, 2013)

In other words, at least in some settings and in some cases, an organization's founders can live on long after their departure or demise, haunting the discourses (and even the destinies) of their successors. Recent research has seen a growing interest in the use of history in organizational identity narratives (Anteby & Molnar, 2012; Schultz & Hernes, 2013; Suddaby, Foster, & Trank, 2010; Zundel, Holt, & Popp, 2016). Yet, the role of the founder figure in organizational discourse has not been the specific focus of systematic research despite its potential importance in achieving

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[2] https://blogues.desjardins.com/coopmoi/2015/05/desjardins-notre-engagement-envers-les-communautes.php; consulted 18th August 2015; (translated by the authors).

[3] See for example a speech by Carly Fiorina at the Consumer Electronics Show (CES), Las Vegas, Nevada, January 8, 2002, "Imaging and invention in a digital age," consulted on 18th August 2015. http://www.hp.com/hpinfo/execteam/speeches/fiorina/ces_02.html

legitimacy for strategic initiatives, and at least implicitly, in orienting and potentially constraining organizational renewal over time (Hansen, 2012; Mordhorst, 2008, 2014).

The present study investigates these issues by examining the case of the Desjardins Group introduced above. We draw theoretically on the concept of "presentification" from the organizational communication literature, i.e., the idea that communicatively making something or someone present in a text can make a difference to the current situation (Benoit-Barné & Cooren, 2009). Specifically, we consider how references to the founder figure in managerial discourse (i.e., making him or her present) might make a difference in terms of understandings of organizational identity and strategy. We analyze archival data from Desjardin's internal magazine over 80 years of its publication from 1935 to 2015, addressing two research questions: (1) How is the founder figure made present in organizational discourse to construct organizational identity and orient action, in particular in times of strategic change? (2) How do forms of presence evolve over time?

Based on our analysis, we identify two modes of "*e*vocation" of the founder in these organizational texts (i.e., references to the founder that mention his name descriptively in a routine manner) and five modes of "*in*vocation" (in which the founder's name is used for an identifiable strategic purpose). We suggest that each of these modes plays complementary roles in senior managers' efforts to gain support from organization members, and that they each have importance but in distinctive ways. We also show how these modes are used across time, and explain in detail the mechanisms by which the founder figure contributes to legitimation during crucial change periods. We note in particular how through the aggregation and accumulation of continued *e*vocations, the founder's symbolic imprint (Marquis & Tilcsik, 2013) becomes enacted, and creates an authoritative presence whose *in*vocation offers strategic potential at critical times, such

as during restructuring. Our paper thus contributes to an understanding of the crucial role of uses of the past in organizational discourse, as represented by the myth of the founder figure.

We begin by reviewing three bodies of previous literature with particular relevance to our research questions prior to detailing the methods, findings and their implications.

Perspectives on Founder Influence: Imprinting, Rhetorical History and Presentification

The founder as a historical source of organizational imprinting

A first classic way of viewing the historical influence of founders on their organizations is through the notion of "imprinting" (Marquis & Tilcsik, 2013; Schein, 1995; Simsek, Fox, & Heavey, 2015; Stinchcombe, 1965), defined by Marquis and Tilcsik (2013, p. 201) as a *"process whereby, during a brief period of susceptibility, a focal entity develops characteristics that reflect prominent features of the environment, and these characteristics continue to persist despite significant environmental changes in subsequent periods."* One particular kind of imprinting occurs when the personality, values and decisions of the founders appear to have a lasting effect on organizational strategy and action (Almandoz, 2014; Baron, Hannan, & Burton, 1999; Erçek & Günçavdı, 2016; Harris & Ogbonna, 1999; Johnson, 2007; Kimberly, 1979; Ormrod, Ferlie, Warren, & Norton, 2007; Simsek et al., 2015). Imprinting may occur in these circumstances because the establishment of organizational structures and routines are based on the founders' personal experience, preferences and entrepreneurial creativity as well as what is available in the environment at the time. As success is achieved and particularly after long tenure, these choices become embedded in the organization's values, culture and identity (Schein, 1995).

One puzzle in the imprinting literature is, however, how and why imprints based on founders' ideas persist, decay or transformed over time (Johnson, 2007; Simsek et al., 2015). Stinchcombe's (1965) early explanations of persistence focused on efficiency, vested interests and

absence of competing models. An alternative explanation relies on self-reinforcing processes in which elements introduced at founding form a pattern or configuration that is mutually supportive and constrains future choices (Vergne & Durand, 2010). Finally cultural, cognitive or institutional factors in which existing patterns of action and theories of success acquire taken-for-granted status are also believed to contribute to persistence (Marquis & Tilcsik, 2013; Selznick, 1957; Simsek et al., 2015). The social processes through which historically embedded beliefs and identities are actually reproduced or adapted over time have not however received direct attention from scholars of imprinting (Johnson, 2007). Moreover, the notion of imprinting implies a rather objectivist notion of history, neglecting the potential for reinterpretation and reconstruction over time (Rowlinson & Hassard, 1993; Suddaby et al., 2010).

The founder as a symbolic resource for rhetorical history

Another perspective, based on narrative and rhetorical history, suggests a second way of considering how historical figures may be linked to present organizational identities and actions. Rhetorical history is defined by Suddaby et al. (Suddaby et al., 2010, p. 157) as *"the strategic use of the past as a persuasive strategy to manage key stakeholders of the firm,"* based on *"a constructivist perspective in which history is an interpretive device for imposing culture, shaping identity, creating community and framing the motivation for action and change."* This perspective resonates with work in business history on the role of historical narratives in constructing (but also potentially constraining) identity (Hansen, 2012; Mordhorst, 2008, 2014; Rowlinson & Hassard, 1993) as well as with recent contributions in the management literature that have drawn attention to managers' uses of history to achieve a variety of different effects (Anteby & Molnar, 2012; Brunninge, 2009; Foster, Suddaby, Minkus, & Wiebe, 2011; Gioia, Corley, & Fabbri, 2002; Schultz & Hernes, 2013; Ybema, 2014; Zundel et al., 2016)

Central among these contributions for the purposes of this paper are those that have focused on how managers draw on history to suggest organizational identity referents, or equivalently to perform "organizational identity work," a term used here to express efforts on behalf of an organization to orient stakeholder's understandings of organizational identity (Anteby & Molnar, 2012; Golant, Sillince, Harvey, & Maclean, 2014; Kirchner, 2013; Zundel et al., 2016). Recent research has shown, for example, that senior managers may draw on collective memory and the past when defining organizational identity (Anteby & Molnár, 2012; Howard-Grenville, Metzger, & Meyer, 2013), even as they attempt to reorient understandings of it towards the current needs of the organization (Golant et al., 2014; Schultz & Hernes, 2013), enabling a sense of continuity in the midst of change.

Different contributions have suggested different ways by which managers may draw on historical referents in their organizational identity work to appeal to different stakeholders and maintain a sense of continuity despite the need for change or adaptation. For example, Chreim (2005) draws on shareholder messages for a Canadian bank over 20 years to show how historically grounded identity labels were maintained over time even as their meanings changed (see also Gioia, Schultz, & Corley, 2000). Anteby and Molnàr's (2012) longitudinal study of an aeronautics firm showed how by continually omitting or minimizing contradictory aspects of the organization's past actions and decisions (e.g., major foreign collaborations), the organisation's internal bulletins maintained a coherent and valued identity for the firm associated with national pride for half a century. Drawing on CEO speeches, Golant et al. (2014) documented how the "identity-defining concept" of "thoroughness" was successfully adapted in the present by managers at Procter & Gamble to mask problematic situations resulting from past practices. Finally, Schultz and Hernes (2013) compared two successive identity redefinition initiatives at LEGO and found that the

second one which dug deeper into the organization's past and that mobilized more diverse memory traces (including oral, textual and material memory cues) offered increased depth and quality of identity reconstruction.

Although these studies show how firms continually mobilize history to influence and even reorient identity constructions, few pay concerted attention to the role of the founder in this process however. Nevertheless, Schultz and Hernes (2013) do note how in the second and deeper identity development initiative at LEGO, managers drew more intensively on memory cues relating to the founder Ole Kirk Christiansen, notably by resurrecting his motto *"Only the best is good enough,"* and by retelling orally transmitted stories associated with his life and tenure that illustrated his concern with quality and excellence. In their study of the discourse of three successive CEOs at Hewlett-Packard, Paroutis et al. (2013) drew attention to references to the "HP Way" as a "mythopoetical discourse" established by original founders Bill Hewlett and Dave Packard. They define mythopoetical discourse as a *"story (myth-making) that has ideological dimensions and that the CEO communicates to internal and external audiences,"* (Paroutis et al., 2013, p. 1202) and go on to suggest based on data from internal magazines and message boards that the more distant the three leaders' personal mythopoetical discourse from that foundational discourse, the more it is likely to raise counter-discourses among observers and organization members.

These studies combined with other work in the area of cultural studies and communication (Boje, 1995; Hansen, 2012; Schein, 1995; Smith & Eisenberg, 1987) tend to suggest that the founder figure may be a distinctive and potentially powerful symbolic resource for rhetorical history, although no studies have to our knowledge explicitly focused attention on that role. This brings us to the third perspective reviewed here that will form the basis for our theoretical framework, the notion of "presentification."

The founder as a voice from the past made present in the here and now

Although previous work has illustrated various ways of referring to the past in defining an organization's identity, and although it has also shown the various forms that these fragments of history and memory can take (labels, discourses, meanings, artifacts, practices, stories), no studies have discussed how *voices from the past* can be involved in textual conversations about identity construction. Researchers have in fact mainly emphasized the voices of current leaders and managers even as they draw on the past. We go further by suggesting that the voices of *past* leaders are sometimes rendered *present* in existing texts through the invocation of the founder figure. We suggest that not only the founders' voices, but also their images and values, even their authority and ethos, may be drawn on in texts, and we explore how these invocations serve to construct organizational identity over time, especially during periods of change. Moreover, we see in the literature that beliefs associated with organizational identity also have an impact on an organization orientations and decisions (Hoon & Jacobs, 2014; Ravasi & Phillips, 2011). Thus, both the founder's legacy and organizational identity together and separately act as a referential frame that managers draw from and redefine according to the organization's current needs and context.

In order to explore how this happens, we draw on the notion of "presentification" that was first introduced by communication scholars Benoit-Barné and Cooren (2009, p. 10) and defined by them as *"those ways of speaking and acting that are involved in making present things and beings that, although not physically present, can influence the unfolding of a situation."* By that they mean that invoking a rule, or the will of someone important, or even quoting somebody else's words, can add weight to an argument and even allow one to say something that could not have been said otherwise. The presence of this element in interaction or in text or talk makes a difference in the situation, i.e., it is performative in the sense that it accomplishes something, whether

intended or not by the person who brings this element into the conversation. It this sense it serves to create authority (Benoit-Barné & Cooren, 2009). We propose that presentification is a valuable concept for understanding the role of the founder figure in organizational identity work and strategic change as it enables us to focus on what is achieved by making various aspects of the founder present in organizational discourse.

Note that in our analysis, we also follow Kirchner (2013) in viewing organizational identity work as serving two purposes: (1) it has an operational function in that it provides a conceptual and referential framework for practices and decisions, and (2) it has an integrative function in that it maintains a sense of unity in the organization as a whole. Organizational identity work thus not only serves to create a sense of coherence and distinctiveness (Sveningsson & Alvesson, 2003), but it also serves as a conceptual basis for collective action.

Based on these ideas, we now present the methodology for our empirical study, briefly recalling for convenience here the two research questions we introduced at the beginning: (1) How is the founder figure made present in organizational discourse to construct organizational identity and orient action, in particular in times of strategic change? (2) How do forms of presence evolve over time?

Methods

Research context and data

The organization studied is the Desjardins Group (in French, the Mouvement Desjardins), a Quebec-based cooperative bank founded in 1900 by Alphonse Desjardins (hence the title of this paper). Alphonse was raised in a poor family, and grew up to become a journalist. During his lifetime he became concerned by the problem of loansharking, which in his view contributed to maintaining people in a situation of poverty. He discovered the cooperative movement that was

developing in Europe while working in the Canadian Parliament as a stenographer (through his access to the Parliament library), and began encouraging the foundation of small cooperatives (called "caisses populaires") in Quebec. He began in his own hometown of Lévis, and subsequently extended his work from Quebec to Ontario and the maritime provinces of Canada. He also founded cooperatives in the New England states, and is believed to be at the origin of the credit union movement in the United States (Poulin & Tremblay, 2005, p. 6). He founded around 130 cooperative "caisses populaires" during his lifetime, mostly in rural regions of Quebec and Ontario. At this time he was supported in his action by the Catholic Church, which saw in the cooperative movement a way to improve the welfare of rural populations. Each cooperative was associated with a parish, and the clergy was deeply involved in managing the caisses, seen at this time as community and non-profit organizations. After Alphonse Desjardins' death in 1920, the movement continued growing supported by the founder's wife Dorimène Desjardins, who survived him by 15 years. Regional unions were developed, to offer support to the cooperatives.

After a slow start, the financial crisis of 1929 gave second wind to the movement, which grew rapidly throughout the twentieth century, transforming a small community association into a major financial institution in Quebec and Ontario, with very diverse financial activities. In 1982 Desjardins had 1465 caisses (credit union branches) offering a broad range of financial services (Poulin & Tremblay, 2005, p. 68). In 2014, Desjardins had $229 billion in total assets, more than 7 million members and clients, 45,966 employees (including 4800 elected officers), and generated $82.3 million in community support (donations and sponsorships)[4]. Desjardins also has 805 service outlets, 360 caisses, 2,225 ATMs and 44 Business centres in Quebec and Ontario. It also has more than 400 establishments offering a broad range of financial and insurance services

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[4] Source: http://www.desjardins.com/ca/about-us/desjardins/who-we-are/quick-facts/index.jsp?navigMW=mm& (consulted on June 8th, 2015)

outside the caisses network. Finally, it operates in 30 developing countries through Développement international Desjardins (DID) and according to the Mouvement Desjardin's website was "(r)anked second among the World's Strongest Banks in 2014 by Bloomberg"[5]. Alphonse Desjardins died in 1920. However, his name has been continuously associated with the organization since that time, not only in its legal name, but also in managerial discourses[6].

Our data for this study consist of references to the founder figure in articles and other texts from the *Revue Desjardins*,[7] a magazine intended for employees and administrators of the caisses, written by leaders and members of the cooperative between 1935 (volume 1, no. 1) and 2015 (volume 81, no. 1) composed of from 4 to 10 issues per year for 80 years (605 documents in total). Internal bulletins have proven to be useful data sources to study the evolution of managerial discourses through time (Anteby & Molnár, 2012; Chreim, 2002), because they "reflect managerial viewpoints" (Chreim, 2002, p. 1127) even when they are not all written by managers. Moreover, because they are produced at regular intervals over long periods of time, they serve in themselves as "organizational mnenomics" (Rowlinson, Booth, Clark, Delahaye, & Procter, 2009) or social practices for remembering the past.

Even more importantly, we believe they have potentially performative agency, because they are capable of creating "fields of action" (Brummans, 2007). As such, internal bulletins may constrain their readers, by offering a path to follow, thus forcing them at least to reflect on "what to do," The texts make people who are not there present, re-presenting them in a different time and space (Benoit-Barné & Cooren, 2009; Brummans, 2007). As such, they can potentially accomplish

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[5] Source: http://www.desjardins.com/ca/about-us/desjardins/who-we-are/quick-facts/index.jsp?navigMW=mm& (seen on June 8th, 2015)

[6] See http://www.desjardins.com/ca/about-us/desjardins/who-we-are/index.jsp for a recent identity statement

[7] Data provided by the Observatoire international des coopératives de service financier of the Alphonse and Dorimène Desjardins International Institute for Cooperatives: http://observatoire.coopfinance.hec.ca/fr/home.html

things and invite people to act (Cooren, 2012). These texts are thus a salient source for studying uses of the past, and in particular the way in which the founder figure is made present in organizational discourse.

Data analysis

The analysis of the extensive corpus was carried out in three phases. First, in the early stages of the research we took an initial exploratory dive into the data. We selected a sample from every 10 years and read through the issues of the magazine. We also started extracting quotations that intuitively appeared to contribute to constructing Desjardins' identity. In doing so, we were immediately struck by the strong presence of the founder figure, but also the figure of his wife, Dorimène Desjardins (who collaborated with him and survived him by 15 years). Sensing that this might be significant for the study of organizational identity work in our data, we used the automatic coding function of Atlas.ti to identify all occurrences of references to these figures in the magazine, using the words that seemed most associated with Alphonse Desjardins in our sample (code words: founder, commander, Alphonse, Dorimène). Over five thousand occurrences were identified. Then we manually coded each occurrence in Atlas.ti according to its role in the text. Some occurrences were deleted as they were not relevant (referred to other individuals with the same name, or with similar titles), but most did indeed refer to the founder (over 4800 quotations).

After successive and iterative coding phases we developed ten analytical codes (see Table 1 for a quotation example for each code), of two types that appeared to distinguish between significant uses of the founder figure within the text. The first type of code referred to the medium through which the founder figures were presentified in the text. For example, references included **direct quotes** extracted from archives; there were also **visual** representations such as photographs, illustrations from comic strips or other art forms (statues, paintings), and even objects related to

the founders (their house, their letters, etc.) (see Appendix 1 for examples). As shown in Appendix 2, over time the use of direct quotes was less frequent, and replaced by greater use of visuals. There were also **reported** quotations from speeches pronounced at conferences or special events.

The other major group of codes was related to actions performed in the text, and these became the basis of our analysis of forms of presentification (Benoit-Barné & Cooren, 2009). We grouped these into two broad subcategories called **evocation** and **invocation,** where evocation implies the naming of the founder without using this to propose direction, while the second implies a stronger use of references to the founder in terms of existing and future actions. We further refined these codes into more specific categories that are illustrated in Table 1, and that will be described in more detail in the first section of the findings. Note that these categories are inductively derived, and were not foreshadowed by Benoit-Barné and Cooren (2009). Some passages had more than one code because of the different natures of codes. After refining the definition of the main codes, a second coder independently coded 10% of the quotations to check for reliability. Levels of agreement ranged from 87% to 95% depending on the specific codes.

Once the coding was completed in Atlas.ti we developed graphs to examine the evolution of presentification types across time and in conjunction with each other. Our objective was to link our primary findings with the longitudinal aspect of our study. We identified periods where the founder was the most present and examined how this presence was manifested. We also examined where the types of presentification we had identified could be linked with major events in the organization's history. This allowed us to identify significant trends in the evolution of the founder figures' presence in organizational discourse. Some of the graphs showing the trends are presented and commented on in the following findings section.

Table 1: Codes with Illustrative Coded Extracts

Codes	Illustrative Coded Extracts
Direct quotation (399 quotations)	For Alphonse Desjardins, economic emancipation was supposed to come from the people: "It is the institutions that the people have organized by themselves," he would declare, "that have the capacity to ensure the population's welfare". This is the reason why the Quebec's people, once educated with Desjardins' main objective that was economic and social education, became the first enablers of their own freedom. (1981, Vol. 47 no. 1, p. 24)
Visual representation (222 quotations)	See Appendix 1, images 1.1., 1.2. and 1.3
Reported citations (257 quotations)	Commander Cyrille Vaillancourt, who personally collaborated with Commander Desjardins explained to the audience the spirit that animated the founder of the first cooperative when he started his grand enterprise. Mr. Desjardins wanted to help the people. He was suffering to see money-lenders exploiting the poor and found a way to prevent them from being victims of loansharking (1958, Vol. 24, no.6 & 7, p. 111)
Simple evocation (1040 quotations)	In June 2009 the Fondation de La Cité announced a donation of 750 000$ from Desjardins and the Ontario Caisses Populaires to create the Centre for Arts and Technology Minto-campus Alphonse-Desjardins (2014, Vol. 80, no. 3, p. 6)
Historical evocation (1508 quotations)	From 1880 to 1884, Dorimène Desjardins gave birth four times. Since the family was growing rapidly, Alphonse Desjardins had a new home built between 1882 and 1884 on the old Blanchet street in Lévis (this is the Alphonse-Desjardins House situated at 8, Mont-Marie Avenue). (1986, vol. 52, no.2, p.25)
Existential invocation (561 quotations)	The vast project led by the Mouvement cannot be summed up in a few lines, but some important elements can be identified. This project consists of constructing together a strong economy that will bring prosperity, welfare and safety for all. The project also involves bringing together private interests and the common good through solidarity and democratic action. It consists of reinforcing the actions of all through the strength of association, and through the strength of "union for life" in Alphonse Desjardins' own words. (1989, Vol. 55, no.6, p.23)
Imperative invocation (211 quotations)	Work to develop money saving practices in your own parish by founding school cooperatives, study circles, etc. (…) In a nutshell, make your Caisse Populaire into an institution whose social role will be faithful to our founder's ideas. Only then will you have deserved (respect) from your fellow citizens (1945, Vol. 11, no. 10, p.187)
Justificatory invocation (503 quotations)	More than one hundred years later, Alphonse Desjardins' objectives are more relevant than ever, as we can see with our new business positioning for youth. La *Revue Desjardins* presents here some of the key actions that will be deployed gradually during the next three years. (2012, Vol. 78, no. 3, p. 12)
Conservative invocation (45 quotations)	Our founder imagined a simple accounting system. Let us keep it simple, while improving it by changing a few details if that is needed, but let us never give way to the whims of useless innovations, that can sometimes be completely ridiculous. Beware of this mania for change that drives some innovators, who are not sufficiently imbued with the cooperative principles on which our Caisses Desjardins are built. (1946, Vol. 12, no.4, p. 71)
Progressive invocation (79 quotations)	For the caisses of 1982 just as for the first caisse founded by Alphonse Desjardins in 1900, the challenge remains the same, to be present and active in the community. The evolution of society compels leaders and employees to redefine participatory mechanisms adapted to the present time. (1982, Vol. 48, no. 5, p. 42)

Third, we focused more deeply on two important change periods identified by referring to

key books on Desjardins' history (Poulin, 1998; Poulin & Tremblay, 2005) in order to better

understand how the founder figure was rendered present and used to define organizational identity and orient action during these crucial times for the organisation. The two periods identified corresponded to two major change episodes pertaining to the transformation of work processes and organizational structures. We read and re-read the coded excerpts taken from these periods focusing especially on those that were associated with actions and decisions (136 excerpts of various lengths), and examined in detail who was making the founders present, and how. We were able to identify and categorize four ways of presentifying the founder figure, and describe a recurring mechanism or sequence of moves associated with the mobilization of the founder figure in times of radical change where the organization's very nature as a cooperative appeared to be threatened.

The first section of the findings provides a description of the modes of presentification identified in the texts during the coding phase and illustrates significant trends in the evolution of presentification over time. The second section of the findings delves more deeply into modes of presentification associated with organizational change. Based on these findings we theorize the ways in which references to the past through the founder figure enable the performance of stability and change through discursive organizational identity work.

Types of Presentification: Evoking and Invoking Alphonse

As mentioned above, we identified two different types of presentification in the texts that we labeled "evocation" and "invocation". Each can take various forms, and each has various sub-types. By considering dictionary definitions, we found that the word evocation is often used as a synonym for invocation. However, we make a distinction by using the word evocation in the sense of simply bringing or recalling to the conscious mind. This is different from invocation that we define as to cite or appeal to someone (or something) as an authority for an action or in support of

an argument. In the case of evocation the founders' words or images do not appear to be staged to do any specific task or to orient action, but we suggest nonetheless that evocations play a crucial role in organizational identity work.

Presentification through *e*vocation

We found two types of evocation, that we called simple evocation and historical evocation. Simple evocation is found every time something in the text has the name "Alphonse" or "Dorimène" in its title, whether it is a book, an award, a foundation, a research center, a museum, etc. We also find simple evocation when we see the portraits of the founders regularly in the *Revue Desjardins*, or even a photograph of a statue, or the couple's house (that was transformed into a museum). There are over 1000 quotations with this code.

Historical evocation (over 1500 quotations) is found when the story of the founders is told in its various dimensions. For instance we sometimes see details from his family life (see Table 1), and stories are told on how he encountered resistance at the beginning when founding the first caisse, even from his own community, but never gave up because he was supported by the clergy. We see articles explaining the role of his close collaborators, among them his wife, Dorimène, and neighbours. In the early days of the *Revue Desjardins* we also find articles and transcriptions of speeches given to Desjardins' executives by his daughters Adrienne and Albertine (who helped him greatly with the cooperatives before becoming nuns) sharing aspects of his private life. His presence thus lives on in the *Revue Desjardins* with the presence of his children (and grandchildren and great grandchildren, who were constantly invited to important events throughout the years and whose presence is constantly reported in the bulletins). Archival documents are frequently quoted and reproduced (letters, private notes, minutes, photographs, etc.), especially in the early days of

the Revue, at anniversaries, and after the foundation of the Desjardins historical society (la Société historique Alphonse-Desjardins) in 1979.

With simple and historical evocation, the founders' images or words are not obviously staged to accomplish anything specific other than to recollect the organization's history. But one can suggest that their ongoing presence serves as a constant reminder for members that they are following in the founders' footsteps through their work. This echoes the link Benoit-Barné and Cooren make between presentification and Derrida's notion of "presencing" and "hauntology" (Benoit-Barné & Cooren, 2009, p. 10), saying that through interactions (or in our case, through texts) there are elements that are present and absent at the same time. These elements are called "ghostal" by Benoit-Barné and Cooren (2009), because they have a spectral presence. The founder and his family haunt the context by constantly "being there," but of course it is a presence that is only materialized through text and images. In the case of the founder figure at Desjardins, it is a positive haunting, one that allows the founder's spirit to be always "in the air" through his constant evocation, as a tacit legitimation of employees' work. From an organizational identity work standpoint this is of fundamental importance, because it serves to maintain a referential repertoire, a common history that everybody at Desjardins shares and can refer to in order to define who they are as an organization and what their purpose is.

By being continually present in managerial discourse throughout the years, Alphonse and Dorimène's figures are always ready to be invoked, that is to be mobilized in a text to accomplish a task, at any moment (for instance, as an advocate for change, or as a voice explaining who we are and what our mission is). Thus, even if for us, at first evocation seemed less important than invocation from a performative standpoint, we suggest that evocation plays a fundamental role regarding organizational identity because it also serves the purpose of always establishing a

conducive context for invocation. Figure 1 shows the trend in simple and historical evocations over time. Their intensity varies (sometimes increasing because of notable anniversaries) but they tend to move in parallel with something of a declining trend in more recent years.

Figure 1: Evolution of Simple and Historical Evocations
(three year moving average)
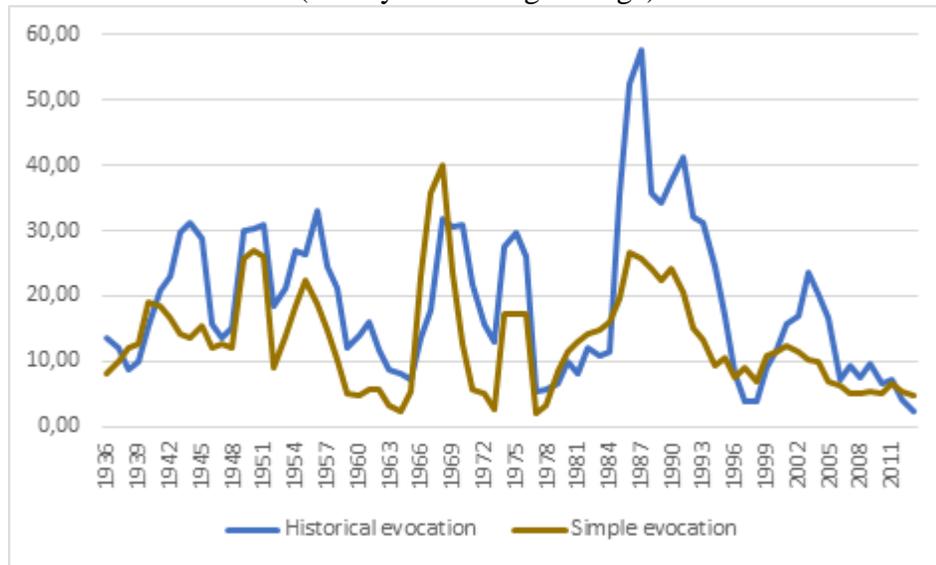
We suggest that simple and historical evocation create a constant and ongoing reminder of the origins of organizational identity for readers of the *Revue.* By repeatedly using the names of Alphonse and Dorimène and by continually telling and retelling their lives and careers, the founding narrative of the Mouvement Desjardins gains in solidity and comes to be institutionalized as incontrovertibly associated with the organization and its members (Mordhorst, 2014). Also, we suggest that the constant availability of these symbols, or more precisely, these "voices from the past" with their associated authority (Benoit-Barné & Cooren, 2009) invites and makes possible their invocation in daily activities and in crucial times for the organization.

Presentification through *in*vocation

The second type of presentification we identified in the data is *invocation*. We define invocation as to cite or appeal to someone (or something) as an authority for an action or in support

of an argument. Invocation can take many forms, as we will see with the five sub-types. It can be linked to visual representations (referring to photos, or other representations of the founders' life) or it can be simply textual (quoting, or paraphrasing the founders, or even associating a value, a principle or an element of this sort to the founders to emphasize their importance).

We identified five sub-types of invocation. The first type we call *existential invocation*. This is the most frequent and most important type of invocation with regards to organizational identity work specifically. This is when the founders are invoked as a direct expression of organizational identity, by referring explicitly to the mission and values of the organization, usually its cooperative aspect. Often an equivalency is made between the founders' values and the organization's. For instance, to state that interest in innovation was one of Alphonse's personality traits is to say that it is one of the Desjardins Group's traits. Consider this example from 1996: *"Faithful to their founder's spirit, cooperative members adhere to an ethic based on honesty, transparency, social responsibility and altruism"* (1996, Vol. 62, no. 4, p.11). Here is another excerpt from 1980 which constructs the organization's identity as more than just a savings bank in a more direct way:

> *If Alphonse Desjardins had been satisfied with collecting small amounts of savings to offer loans to the highest bidder, his caisses would not have the success and fecundity we know they have. The future of the caisses Desjardins is of course tied to their capacity to offer conditions that are advantageous as compared to the competition. But this future is also tied to their "difference," to their distinctive features, to their specific merits. The importance they attach to information and the education of their members is one of these original characteristics.* (1980, Vol. 46, no. 6, p. 36)

This type of invocation serves mainly an integrative function, since every member can associate with this type of imagery and discourse creating and sustaining the organization's identity. Along with simple and historical evocation, existential invocation allows the organization to *exist*,

through its history and founder's legacy, and through its values and mission that define its central and distinctive features (see also Table 1).

The second type we found is *imperative* invocation This form of invocation was more frequent during the earlier years (see Figure 2), when it appears to have been more acceptable to tell people what to do in an authoritative manner, and when Desjardins was closely associated with the Catholic Church and its moral standards. Consider this example from 1949, from a public speech delivered by one of the founders' daughters:

> *"Some cooperative managers only think about growing their asset base. It is fine to be ambitious. However, this should never be detrimental to the objective our founder dreamt about: "To give to the small and the humble the necessary resources to have a decent life and a minimum of welfare which, according to Saint Thomas, favors virtue and righteousness."* (1949, Vol. 15, no. 8, p. 148; For another example, see Table 1).

Here, what is rendered present is the founder's authority, as explained by Benoit-Barné and Cooren (2009). Authority, or the capacity to tell people what to do (or not to do) is accomplished by staging the founder figure within the text. Adding to the founder's presence by the voice of his daughter herself quoting his words directly creates the illusion of having him speak directly to managers. Whether they followed this recommendation or not we cannot know. However we see that authority is performed through staging the founder figure within the text. This example shows how the presence of the founder's words and wisdom in organizational texts provides a conceptual and referential framework used to influence practices and decisions in day-to-day work at the caisses, thus serving the operational function of organizational identity work identified by Kirchner (2013).

We found that a third sub-type of invocation also serves this operational function, but in addition, the integrative function (Kirchner, 2013). We call this *justificatory* invocation. This happens when invoking the founder's words (but also his heritage or vision) serves to justify or legitimate an ongoing course of action by showing how it serves Desjardins' mission as the founder

wanted this to be. It consists of creating a form of endorsement from the founder for something already taking place in the organization, thus confirming the consistency of what the organization is doing with who they are. For example, this excerpt from 2009 shows how an ongoing partnership between Quebec and Ontario is in continuity with the founder's vision:

> "*In short, the partnership Quebec-Ontario is very fruitful. Alphonse Desjardins, who was living in Ontario six months per year when he was working as a stenographer for the House of Commons (1882-1917), founded 18 cooperatives in Ontario*" (*Revue Desjardins,* Vol. 75, No. 3, 2009, p.33).

Figure 2: Evolution of Existential, Imperative and Justificatory Invocations
(three-year moving average)
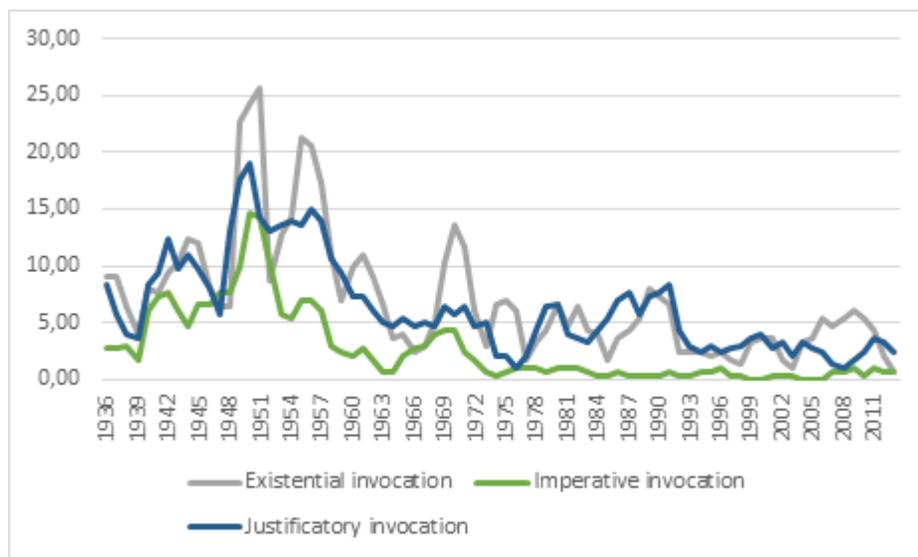
Consider also this example, constituting a general endorsement of the caisses' action, undoubtedly providing reassurance and confirmation for employees:

> "*It is by continuing in this manner that the cooperative will remain an economic and social development agent and will keep on playing its economic leverage role. Recall that by creating the caisses, Alphonse Desjardins wanted people in every community take matters into their own hands and work together to give themselves the financial resources to ensure their own financial welfare.*" (1991, Vol. 57, no.4, p. 24).

As can be seen from Figure 2, existential, imperative and justificatory invocations reach a peak in the 1950s and then decline. There is a precipitous drop for imperative invocations which rarely appear after the early 1970s. It is noteworthy that this drop aligns closely with the death of Cyrille

Vaillancourt, President-Manager of the Federation from 1932-1969 who founded the *Revue* and who also knew Alphonse Desjardins personally. We will return to his role in the discussion.

The fourth type of invocation we label *conservative* invocation. This occurs when a text quotes a sentence from the founder, or traces a key principle or value back to the founder to argue for the maintenance of the status quo in the face of pressures for change (see also Table 1). Citing the founder or associating a principle with him serves to reassert Desjardins's identity, for instance by reaffirming its cooperative heritage as its core value. For example, the following extract from 1958 re-establishes the idea of Desjardins as *not* a bank, drawing on the words of the founder:

> *"The figures presented above show that our Caisses populaires [credit union branches in French] have progressed significantly in terms of their assets. What our Caisses populaires must avoid however is to become banks. Mr. Desjardins refused to use the word "bank" to name the Caisses populaires, because – he said – Caisses populaires are not banks, they are savings and loan organizations to help the working class, organizations where people are not afraid to come because they feel at home there."* (1958, Vol 24, no. 5, p. 84).

In contrast, the fifth sub-type we found is *progressive* invocation, which is when the founders' words or the founders' vision are cited to advocate in favor of a major turn in the cooperative's orientation or strategy, thus presenting the desired change as in accordance with the founder's ideas. In a cooperative, invoking the founder's vision to support a major change is particularly important for the CEO and top managers, since because of its democratic structure they need the support of the delegates (representatives of the trustees of all caisses or branches) to take major decisions. Consider this excerpt, taken from an article with the title: "The arrival of new financial services: the signal of an irreversible movement", where the cited managers call on readers to embrace change, following Alphonse's example:

> *Mr, Claude Goulet stressed, with a little smile, that "in 1900, Alphonse Desjardins was considered a "visionary light" for his time. If we want to honor his memory, let us be visionaries as well!" According to Mr. Richard Tassé, the caisses will not be able to exclude integrated financial products and services from their action plan. Each caisse is free and*

autonomous, but an inevitable synergy effect will be created in order to respond to our members' already existing expectations" (1988, Vol. 54, no. 2, p.23).

Here, readers are offered an opportunity: to "be like Alphonse" by embracing a new course of action. This is presented as an encouragement to follow a path, opening up new action possibilities. The caisses are given a choice, but we see that to "be like Alphonse" is considered the most acceptable option in this context. Alphonse's authority and ethos are rendered present in the readers' situation, to convince them subtly to embrace a new course of action.

Invoking Alphonse's words in relation to organizational identity and arguing for or against change thus provides a conceptual and referential framework for practices and decisions, serving the operational function identified by Kirchner (2013). Whereas simple and historical evocation, along with existential invocation, allows Desjardins' identity to *exist* by being constantly defined and brought to mind through its founders' legacy, we find the last four sub-types of invocation (imperative, justificatory, conservative and progressive) to be a means for managers to orient action by *exhorting* people to do something (or not do something). We chose the word exhort because it means basically to emphatically urge someone to do something, and it is a synonym of encouragement and persuasion. This softens the top-down (or sender-receiver) conception of communication often adopted when studying managerial discourse, to favor a view in which this form of invocation creates a presence that orients actions rather than demanding them. The founder figure's presentification create situations where people have the choice to embrace the suggested path or not. Even if people will most likely choose to follow Alphonse' directives or example, by creating the presence of the founder within situations, managers also create *choice situations* where readers can decide what to do next, and be proud to follow the founder's footsteps. In the context of a cooperative, this is important, because, as we indicated earlier, the democratic structure creates the need for support from the delegates. The presence of the founder mediates the exercise of

authority, which is delegated to these important figures. In our study, the performative aspect of this presence can be seen through organizational responses to change episodes and through the evolution of the founder's presence in discourse. Figure 3 shows the trend for conservative and progressive invocations. Though smaller in absolute numbers, through time we observe a significant decrease of quotations invoking the founder figure to advocate in favor of the status quo (conservative invocation), and an increase of quotations invoking the founder to advocate in favor of change (progressive invocation). This appears logical: more recent organizational discourses needed to enable change in order to embrace modernization and yet the founder's vision remained a key of identity and legitimacy. In the next section, we explore in more depth how the founder's presence was mobilized during these key episodes of change.

Figure 3: Evolution of Conservative and Progressive Invocations
(three-year moving average)
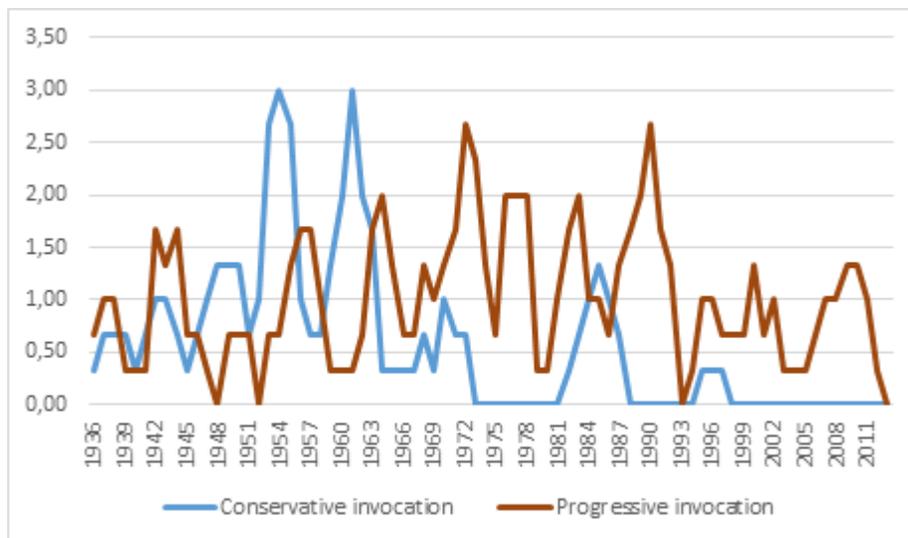
Founder Invocation and Identity Construction in Times of Change

In this section we study more closely the excerpts from two crucial periods to examine the evolution of Desjardins' identity in relation to strategic change, and to understand more thoroughly how the founders were invoked during these important times. Based on 136 quotations from these

time periods including all the types of invocation related in any way to action (imperative, justificatory, conservative and progressive), we noticed a common pattern of invocation that took place in three sequential "moves" within these extracts.

The two periods we identify (1967-1977; 1994-2004) correspond to two key periods during which Desjardins underwent important changes regarding their structure, but also their financial services offering and work processes (Giroux, 1993; Poulin & Tremblay, 2005). We called these two periods the *modernizing era* and the *restructuring era*. The first period we call the modernizing era because it is during this time period that Desjardins went through a major metamorphosis that gave it the stature of a major financial institution (Poulin & Tremblay, 2005, p. 17). Notably, this period is marked by technological change and the acquisition of several subsidiary corporations. The restructuring era was marked by a major restructuring, involving three important dimensions: the merger of several caisses to reduce their number and replace some by ATM's, a process of reengineering operations and financial services, and the merger of the regional federations with the confederation into one single federation (going from a three-level structure to a two-level structure) (Poulin & Tremblay, 2005). During the first era the authors of the articles studied were mainly presidents of regional federations (Alfred Rouleau, Paul-Émile Charron) as well as middle-managers, but also external actors (scholars, journalists, politicians) invited to speak at internal events, whose speeches were transcribed in the *Revue Desjardins.* During the second period the authors were mainly Desjardins' presidents (successively Claude Béland and Alban d'Amours), but also internal middle-managers and external actors.

The three moves making up the overall pattern we identified play out as follows. First, through diverse texts we see that Alphonse and the context of the foundation of the cooperative are invoked to explain why things are currently working the way they are, *but also* to mark a

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distance with a prior time period. This serves to create a form of distantiation between the previous era and the current one. Basically the founder is invoked to legitimate the current way of doing things (it comes from our history), but also to show that this is somewhat outdated and obsolete. We found this double movement in several quotations. If we refer to classic conceptual models of change (Lewin, 1989), we might say that this first step serves towards "unfreezing" the situation (Weick & Quinn, 1999), that is to advocate for the need for change, while preserving the legitimacy of the organization's identity and its current ways (it is normal that we do things this way because we inherited it from the founder). Here are examples, from the two periods (see Table 2).

Table 2: Move 1: Unfreezing: Invoking the founder and his context to create distance

Move 1: Referring to Alphonse and his context to create a distance	
Modernizing Era (example)	**Restructuring Era (example)**
Perhaps the time has come for you to mobilize these enormous assets for the benefit of commercial and industrial enterprises? I know this was not the goal of Commander Desjardins, but we have to ask ourselves whether when he delimited our sphere of activity, he could have envisioned that his successors would have access to such powerful and important financial assets. (1967, Vol. 33, no. 10, p. 164)	In reality the role of the directors has greatly evolved since Alphonse Desjardins organized the first caisses populaires. (…) Nowadays directors must consider both their caisse's interests and those of the whole network. While staying independent, the caisses are evolving more and more in a context of interdependence, in a large and diversified network. (1995, Vol. 61, no. 5, p. 12)
Other similar quotations: - 1971, Vol. 37, no. 6 p.38 - 1972, Vol. 38, no. 5, p. 19 - 1973, Vol 39, no 2 , p.30	Other similar quotations: - 1996, Vol. 62, no.2, p. 5 - 2001, Vol. 67, no. 3, p. 10 - 2001, Vol. 67, no. 5, p.12

Second, the authors of the *Revue Desjardins* and the leaders that are quoted in their pages have three different ways of invoking the founder to advocate for change: (1) they may quote his words directly and provide an interpretation that goes in the direction they favor, (2) they "make him speak" by summing up his thoughts, to argue that the proposed change is faithful to his vision, (3) they may cite him as an example to follow, by qualifying his actions and behavior and saying that they should walk in his footsteps by adopting the proposed change. Here if we go back to

Table 3: Move 2: Changing: Invoking the founder to advocate for change

Move 2: Invoking the Founder to Advocate for Change	
Modernizing Era (examples)	**Restructuring Era (examples)**
Variant 1 : Quoting Alphonse directly and interpreting his words	
Yet Alphonse Desjardins was profoundly aware of the necessity to transform an important part of savings into productive capital… This idea is very clear in a presentation he made in 1912: *I do not need to extol the benefits of saving money. It's because of savings that we can make capital and that the people's wealth grows. Without saving, it is impossible to make capital, and without capital we stay as deprived as the savages that were inhabiting these lands when our ancestors came…".* (1973, Vol. 39, no. 4, p. 6) Other similar quotations: - 1969, Vol. 35, no. 6, p. 123 - 1972, Vol 38, no. 5, p.3 - 1976, Vol. 42, no.2, p. 5 - 1977, Vol 43, no.2, p.4	Excerpt from Alphonse' letter to his collaborators in 1920 : *"I was also dreaming of creating a federation where every caisse would be represented, so that they could be stronger and all have the same direction, corresponding to the idea I had when I founded this movement. This new federation would give them a renewed strength."* (1999, Vol. 65, no. 1, p. 19) (see also Appendix 1.3) No other similar direct quotations
Variant 2 : Making Alphonse speak by summing up his thoughts	
Of course the Caisses populaires are, and must always remain, credit union branches in order to be faithful to the nature and mission the Commander Alphonse Desjardins assigned to them. This means that they are associations of people from the same territory or social group that put their savings together to help each other economically and socially. However, the form and the scope of this economic and social mutual help inevitably changes in our ever-evolving world, since financial and social needs greatly vary and change between people and between communities. (1971, Vol. 37, no. 6 and 7, p. 38) Other similar quotations : - 1972, Vol. 38, No. 3, p. 5 - 1973, Vol 39, No 2, p. 40 - 1977, Vol. 43, no. 2, p. 42	The autonomy-solidarity debate even marked the last months of the founder's life when he advocated in favor of the creation of a provincial federation and a central caisse. (1995, Vol. 61, no.4, p. 2) Other similar quotations: - 1996, Vol.62, no.2, p. 3 - 1999, Vol. 65, no. 5, p. 16 - 2004, Special edition, p. 2
Variant 3 : Presenting Alphonse as a role model to imitate	
We must, following our founder Alphonse Desjardins, see clearly and keep our eyes open at this crossroads for new beginnings, and judge the facts in a cold, lucid and honest way. We must respond adequately to the needs of our time with the dose of wisdom and courage that events demand. (1972, Vol. 38, no.3, p. 40) Other similar quotations: - 1968, Vol 34 no 5, p. 92 - 1972, Vol. 38, no. 3, p. 40 - 1974, Vol. 40, no.1, p. 11 - 1977, Vol. 43, no. 2, p. 42	The genius of Alphonse Desjardins was to graft the caisses onto the vital forces of the parishes of his time that were already structured and organized. This capital has changed and is still changing. We must reconnect the caisses to today's vital forces: the community in the caisse and the caisse in the community. Faith in the past, yes – but above all, faith in the future. (2003, Vol. 69, no. 2, p. 17) Other similar quotations: - 1994, Vol. 60, no. 2, p.16 - 1995, Vol. 61, no. 4, p.2 - 2002, Vol. 68, no.4, p. 3

Lewin's model we are in the second step, the step of implementing change by rallying people to the cause (Weick & Quinn, 1999). For instance, during the second change period, the management was trying to convince members to vote in favor of a major restructuring that involved merging the regional federations into one central federation for the whole province of Quebec. In the 1999 January edition of the *Revue Desjardins*, there is an interview with the president entitled *"What I want is a clear orientation"* in which he states:

> *"This question of a support structure for the cooperatives was addressed by Alphonse Desjardins at the end of his life, when he proposed the creation of a provincial federation. But his illness, then his death in 1920, put an end to this project"* (Claude Béland, Vol. 65, No. 1, 1999, p.17).

Here we have an example of making the founder speak, to orient the interpretation of this historical fact in favor of the merger of the regional federations. We also find, next to this article, a comic strip representing Alphonse Desjardins explaining to his daughter his dream of having "one federation" to support the cooperatives (Vol. 65, No. 1, 1999, p. 19). Right under the comic strip, which is based on a comic book on the life of the founder published for children in 1990, we see a reproduction of one of the founder's original letters, including his signature, in which he describes his idea of a single federation (see Appendix 1, image 1.3.). We also have an example of direct quotation, associated with an article that "gives cues" on how to read this letter from the founder.

Presentification thus takes many forms even within one single article, with the president of Desjardins having Alphonse speak by retelling his vision, by a visual representation of Alphonse telling his dream of a single federation to his daughter, and by having a reproduction of his own letter, including his signature, thus directly addressing the reader (see Appendix 1.3). All of this serves to create a context where the reader is almost literally "in the presence of the founder", so to speak. He is placed in the position of choosing whether to answer positively or negatively to the founder himself. This "presence effect" is not only created by managers. We also see examples in

other writings during this change period, coming from change detractors (retired Desjardins managers, journalists, citizens, etc.). They too make Alphonse speak, to say that he would never have endorsed such a restructuring that will remove control from the members and will hopelessly distort Desjardins' fundamental democratic structure (Croteau, 2004). However, these dissenting voices did not convince Desjardins' members who voted massively for the restructuring at the end of 1999. Table 3 shows some further examples of the use of these variants.

The third move concerns the use of justificatory invocations during change periods. When we look closely at the excerpts, we observe some alternation between the justification of new initiatives and of long-established practices. Some ongoing changes are well justified on the basis of Alphonse's example, such as new marketing processes in 1970-1973. The writers (possibly under threat of criticism) did not hesitate to call on Alphonse's prior example. Indeed, he was known to use propaganda to convince people to be members of the caisses and to educate people about the benefits of saving money, as we see in this excerpt taken from 1971:

> *"During 1970-71, we have tried to offer a consistent image to the public. We are continuing to pursue the path traced, in terms of principles, by our founder, Commander Alphonse Desjardins. In 1905, our founder said, "Right now, what we need is a press campaign to influence public opinion.".*(1971, Vol. 37, no. 6 & 7, p. 21)

We can also find other quotations pertaining to the progressive automatization of the financial operations in the caisses during the years 1970, and of a really significant change, the foundation of an investment branch in 1971 (Poulin, Tremblay, 2005). Thus we see continued legitimation of ongoing changes during change periods using justificatory invocations both in the modernization and restructuring periods (for more examples, see Table 4).

Table 4: Move 3: Refreezing; Justifying ongoing changes

Move 3: Justifying current practices and ongoing changes	
Modernizing Era (examples)	**Restructuring Era (examples)**
Justifying ongoing changes	
Since mechanical work is now done by machine, administrators now have access to first class management information to make required decision. (…) Knowing better the characteristics of their members and having more time to devote to them, the Caisses will devote themselves more to the essential objective that Commander Desjardins visualized: the economic social, individual and community development of its members (1973, Vol. 39, no. 1, p. 12) Other similar quotations: - 1972, Vol. 38, no. 1, p. 55 - 1972, Vol. 38, no. 2, p. 9 - 1972, Vol. 38, no. 5, p. 3 - 1977, Vol. 43, no. 2, p. 44	With their crystal-clear choices, the 1999 executives confirmed their belief that Desjardins is a strength that belongs to the people of Quebec, a strength inherited from a visionary and tenacious founder, who broke down, one by one, the obstacles in the path of his project. (1999, Vol. 65, no. 2, p.3) Other similar quotations: - 1999, Vol. 65, no. 1, p.17 - 2001, Vol. 67, no. 2, p. 1

Nevertheless, especially during the Modernizing Era (but not in the Restructuring Era), we see other practices that are reasserted in relation with the founder's heritage, sometimes reflecting the domains where changes were controversial. This does not mean that the changes made between 1994 and 2004 were less controversial, as we have explained before, but that that dissenting voices were not present in *La Revue Desjardins.* What we observe here, especially in the Modernizing Era, is how the tension between stability and change is sometimes played out, and there is at times a certain prevarication about how the founder's heritage should guide the organization.

Recall that justificatory invocations generally follow the pattern of existential invocations (see Figure 2). This suggests that by presenting the founder figure in their discourse in the *Revue Desjardins*, the organization's managers show continuity through change. What they appear to perform through their discourse is staying the same while changing: the performance of a malleable identity that adapts to the organization's current needs and context while staying faithful to the founders' legacy. This creates stability even when major change creates doubt and turmoil.

In other words, this analysis suggests that continuous organizational identity work performed by constantly rendering the founder's present in managerial discourse and organizational life fulfills the integrative and operative functions, and become a fundamental resource in times of profound transformation. In this section we described the three moves identified in a linear fashion, but these three steps are highly iterative, as we saw several overlaps during the change periods studied.

Finally, we found that in the years following the change periods the authors of the *Revue Desjardins* invoke Alphonse to justify and legitimate their current and recent actions, but without making further allusions to the changes that have recently been made. Again following Lewin's model we could argue that this represents a "refreezing" phase, where the implemented changes become routinized and embedded in daily work. There is no longer a need to invoke the founder to convince anyone anymore: senior managers move on to justifying other ongoing practices and initiatives of the organization.

Discussion and Conclusion

The findings offer evidence concerning the role that founder figures play in organizational identity work and the evolution of these roles through time and at key moments in the organization's life. Our paper makes several contributions to the literature on the uses of history in organization studies.

Founder presentification as a resource for rhetorical history

First, we illustrate and explore one important way of drawing on the past when defining organizational identity and orienting action that has been overlooked by the previous literature. This involves "presentifying" the founder figure in organizational discourse. The presentification process can take many forms and varies across time and as a function of what is going on in the organization's life. We identify two forms of evocation and five forms of invocation that together

constitute a repertoire of rhetorical devices that contribute to establishing organizational identity and persuading members of the pertinence of proposed or existing actions.

We argue in particular that the staging of the founder figure in managerial discourse plays two complementary roles. On the one hand, through simple and historical evocation as well as through existential invocation, the emphasis is placed on enabling the organization to *exist*, i.e., reinforcing its distinctive identity. This implies remembering its history and affirming its difference, in our case through reference to cooperative values and mission associated inextricably with the name and history of the founder, and articulated explicitly in existential invocation.

On the other hand, across time there are moments when the organization's leaders also use presentification to *exhort* their members to either continue their good work or take a new path, especially in relation to major changes that can alter the core identity of the organization. In some cases (as for imperative invocation), organization members are overtly directed to follow the founder's commandments. Here, it almost seems as if the organization's leaders are directly "channeling" the founder's spirit – he is made present and authoritative in an almost tangible way. Alternatively, they may be exhorted to maintain the straight and narrow (conservative invocation), move with the founder towards new heights (progressive invocation), or accept existing practices because they build on the edifice and organizational identity the founder created. The notion of presentification (Benoit-Barné & Cooren, 2009) thus helps reveal how leaders assign agency and authority within their own discourses to the symbolic image of the founder.

Founder presentification as a mechanism of imprinting

We argue that the potential for an organization's leaders to mobilize the founder as a symbolic resource through presentification (and more especially for them to maintain this potential over 115 years of the firm's existence) is not guaranteed, and relies on the combination of modes

of evocation and invocation spread out over long periods of time. In other words, there is a path-dependent process at work here that links our study back to the literature on imprinting as we shall see (Johnson, 2007; Marquis & Tilcsik, 2013; Simsek et al., 2015).

The graphs we presented in Figures 1, 2 and 3 illustrate how the intensity of different types of evocation and invocation of the founder in the *Revue Desjardins* varied over time. Based on the graphs and the analysis of events, we suggest that the initial period from 1935 to 1970 was a crucial time during which the influence of the founder's vision on the destiny of the organization (or at least his successors' interpretations of it) was consolidated and reproduced in a highly energetic fashion through the discourse of organizational leaders, and in particular by Cyrille Vaillancourt, the President from 1932 to 1969. That period was characterized by the intensive use of imperative and conservative invocations as well as fairly high levels of historical and simple evocation and of justificatory and existential invocation as well. Vaillancourt's discourse as reflected in the pages of the *Revue* (and he was indeed author of many of them) suggests that he managed Desjardins very much in the founder's name. We would argue that through his long tenure, and his use of imperative and conservative invocations of Alphonse Desjardins, he extended the influence of the founder well beyond his lifetime, enhancing his substantive imprint on the company. In other words, one of the missing social mechanisms explaining the persistence of initial imprints (Johnson, 2007) may lie in the reproduction and circulation of founding narrative discourses by the founder's successors (Hansen, 2012; Mordhorst, 2014).

This statement should not however be taken to imply that through these discourses, the organization necessarily retained all the features that its founder had left it with (as a naïve adoption of the imprinting perspective might suggest). The discourses presented in the *Revue Desjardins* by Cyrille Vaillancourt and others are of course themselves forms of rhetorical history no doubt

strategically written to achieve certain effects, not all of which the founder would probably have recognized (Suddaby et al., 2010). However, by continually presentifying Alphonse as the ultimate authority on the identity and destiny of Desjardins, Vaillancourt and other writers in the *Revue* of the time certainly contributed to making his name and history available for future generations: writers in the *Revue Desjardins,* and others as well.

While the role of early imperative and conservative invocations seems important to making the founder available for future symbolic use, we argued above that the continued mobilization of simple and historical evocations similarly contribute to sustaining the potentiality of his presence through accumulation, even though each single evocation achieves nothing much in itself. Existential and justificatory invocations for their part continually maintain the linkage of the founder's name with organizational identity and ongoing actions respectively, providing the ideological grounding for decisions, and sustaining continuity. We would suggest that progressive invocations play a different role. Through these invocations, the presence and image of the founder is in one sense refreshed and renewed. But on the other hand, it is nonetheless diluted. A detailed study of the features of the founder's initial vision that are retained and discarded through successive invocations lies beyond the scope of this study. However, we know that as in Anteby and Molnar's (2012) study, certain elements (e.g., the founder's religious zeal and concern with savings) have been forgotten, often giving place to more generic references to cooperative values and innovation, the latter applicable to almost any founder of a business enterprise.

More generally, this study suggests that the availability of a founder as a symbolic resource for organizational identity work and strategic change is dynamic. It needs to be constructed, sustained and reproduced over time through some of the means we have shown here. Moreover every successive use can in itself potentially influence the value of that resource for the future.

Founder presentification as a mechanism for continuity amidst change

Finally, we also contribute to the literature by identifying a recurrent pattern of organizational identity work in times of change that consists of three discursive moves: 1) invoking the founder to legitimate ongoing course of action but at the same time creating distance from it by showing that it is outdated; 2) invoking the founder to argue for change, either by quoting him directly, making him speak by paraphrasing him, or presenting him as a role model and showing that by embracing change, readers will be marching in his footsteps; 3) finally, investing in justifying the changes made in the organization by linking the organization's actions with the founder's legacy, re-telling his story and reasserting the organization's mission and values. As in Anteby and Molnàr's study (2012), certain practices are forgotten or abandoned along the way (evidenced in the first move). However, presentifying the founder figure in crucial times enables the legitimation of this abandonment, and the embrace of new practices. In other words, reference to the deep past and to a strongly held organizational identity associated with cooperative values as represented by the founder figure enables continuity in the face of major change.

Note that the financial cooperative context, where members of the cooperative participate in key decision processes (notably as elected directors of the individual caisses and as delegates at federation level) allowed us to see continuity through change as a joint performance, where leaders stage the founder figure, but where members respond positively to it and vote for change. In either case the responsibility for the decision can be attributed in part to the founder's authority, manifested by his constant presence in managerial texts. It is possible that there may be something specific to the cooperative form that may enhance the importance of the founder figure as a symbol of unity of purpose in an organization characterized by a democratic structure, but also conflicting values (those of economics and of social good) (Kraatz & Block, 2008). Yet, since many

organizations have conflicting values and a strong history, we think that invoking and presentifying founders (or other past significant leaders) may provide potential for sustaining continuity amidst change, even in organizations that are not cooperatives.

At Desjardins and in other organizations that have grown up to become major corporations from small community-based roots, it is possible that the image of the founder has remained central as an identity symbol in part precisely because of the weakening hold of strong cooperative social values in practice. In other words, this organization like others (e.g., Arla, the dairy cooperative studied by Mordhorst, 2014) conserve the shell of these social values as a marketing ploy and raison d'être, while the organization itself has in effect become increasingly similar in its offerings and relations with clients as any other equivalent organization (a bank, in fact). In such situations, the distinctive nature of the organization is at stake, raising important questions regarding legitimacy and strategic advantage. This shows the central importance of invoking the past to bring it into the present when constructing organizational identity to demonstrate enduringness, especially when the organization has dramatically changed through time.

Indeed, invoking the founder and his spirit in face of change or to legitimize ongoing activities becomes a way of meeting one of the greatest challenges of identity: remaining the same while changing (Ricoeur, 1992). In summary, "presentifying" the founder in organizational discourse, is a way to perform change and stability at the same time. The power of rhetorical history here resides in its ability to bring to life and make present key elements, in this case the deceased founder, that are otherwise absent and that are of crucial importance to demonstrate continuity in a context of change.

Holding that thought, we end this paper as we began, with a recent quotation from a Desjardins executive. In this case, we draw on a speech by Guy Cormier, newly elected President

of Desjardins, to the Chamber of Commerce in Lévis, the home town of Alphonse Desjardins and

the site of its head office. In concluding his speech delivered on May 5th 2016, he shows that even

as the Desjardins Group prepares itself to confront the challenges of the "digital revolution" in

banking, Alphonse is still the ever "present" identity custodian and spiritual back-seat driver:

> *"In conclusion, the Mouvement Desjardins has everything it needs to remain a leader in the financial world, to be even more innovative to better serve our members and our clients. We also have everything we need to be better known, here and abroad, as a cooperative leader. It is in this spirit, that I will work, with all our teams, to pursue the project of Alphonse Desjardins.[8]"*

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[8] Notes for a speech given by Guy Cormier, President and Chief Executive Officer of the Desjardins Group before the members of the Chamber of Commerce of Lévis: "A new impetus for the Desjardins Group", Lévis, Thursday May 5, 2016); translated from the French by the authors; consulted on 13th June 2016: https://www.desjardins.com/ressources/pdf/d15-allocution-2016050502f.pdf?resVer=1462472972000

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Appendix 1

1.1. Visual evocation (1935, Vol. 1, no. 1, p. 1 and Vol. 1, no. 2 p.1)
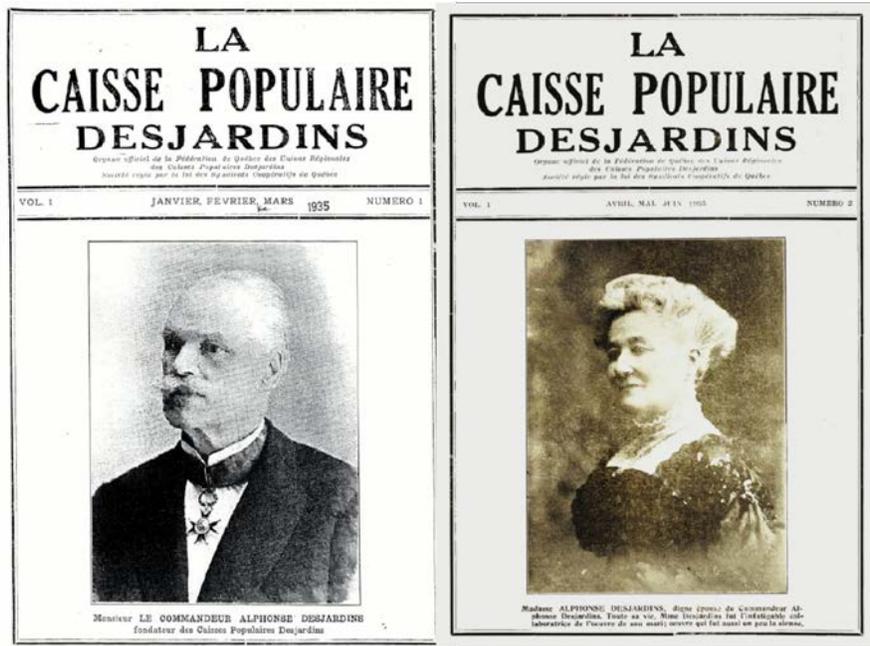
1.2.Visual evocation: Monique Leroux, president of Desjardins 2008-2016, sitting in front of Alphonse and Dorimène's portraits (2008, Vol. 74, no. 3, p.15)

1.3. Visual evocation: comic strip of Alphonse Desjardins' life and reproduction of one of his letters, including his signature (1999, Vol. 65, no. 1, p. 19)

Appendix 2: Evolution of Direct Quotes and Visual Evocations (three year moving average)