

# **Rising Every Time we Fall: Organizational Fortitude and Response to Adversities**

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## **Abstract**

The role of organizational resilience enabling firms to respond to adversity and survive has become ever more critical in the wake of an increasingly unpredictable external environment. Yet, while we understand the importance of resilience in responding to a major adversity, we have little appreciation for how firms are affected and react when facing multiple adversities over time, or how multi-level factors might impose on this process. These are crucial issues given that adversities are not necessarily single, isolated, or infrequent episodes. By studying a long-established family firm in the UK that experienced four major adversities, we identify the process that enabled it not only to survive, but also to thrive. In this qualitative study, we introduce the notion of *organizational fortitude* to describe the approach that a firm develops to cope with the challenges of multiple unexpected adversities, and highlight how multi-level factors combine to foster organizational fortitude.

***Keywords:*** Resilience, family firms, organizational fortitude, adversity, case-study

*In the early months of this year, we could see this thing [Covid-19 pandemic] coming and the immediate feeling was oh God, here we go again, another crisis, you know... it's quite funny because when I tell people about the fire, the flood... the compulsory purchase, everyone says, 'what about the plague of locusts?' Well, now we have the plague as well! It's just another catastrophic event to deal with. So we felt that we're quite good at handling these crises and here goes, we know how to deal with it, you've just got to be flexible and determined just to do whatever you need to do to make sure that you can survive it as a family firm.*

(Lance Forman, CEO, H. Forman & Sons)

This quote illustrates a situation that more and more organizations face today – frequent, diverse, and often unpredictable adversities. To meet increasing and often unanticipated adversities, organizations need to be resilient (Lengnick-Hall & Beck, 2005; Linnenluecke, 2017; Raetze, Duchek, Maynard, & Wohlgemuth, 2022). Scholars define resilience as “the process by which an actor (i.e., individual, organization, or community) builds and uses its capability endowments to interact with the environment in a way that positively adjusts and maintains functioning prior to, during, and following adversity” (Williams, Gruber, Sutcliffe, Shepherd, & Zhao, 2017: 742). Research on resilience has gained momentum (Hillmann & Guenther, 2021; Raetze et al., 2022) in the wake of events such as the 9/11 terrorist attack in 2001 (e.g., Gittell, Cameron, Lim, & Rivas, 2006), the global financial crisis in 2008 (e.g., DesJardine, Bansal, & Yang, 2019), and the Covid-19 pandemic that emerged in 2019 (e.g., Branzei & Fathallah, 2021; Mithani, 2020). Indeed, scholars have noted that when an organization is challenged by such adversity, a fault line can be traced between its past evolution (before) and its future change (after) (Lengnick-Hall, Beck, & Lengnick-Hall, 2011; Roux-Dufort, 2007; Williams et al., 2017). Put differently, prior research is characterized by a schism between studies focusing on the pre-adversity period (e.g., Almklov & Antonsen, 2010) and those examining the post-adversity period (e.g., DesJardine et al., 2019; Shepherd & Williams, 2014), considering the “moment of resilience” (Boin, Comfort, & Demchak, 2010: 7) as the turning point between the two periods. Accordingly, research on organizational resilience has thus far mostly adopted the single organizational-level of analysis, and the adverse circumstance as the unit of

analysis – e.g., earthquake (Salvato, Sargiacomo, Amore, & Minichilli, 2020; Williams & Shepherd, 2016), bushfire (Shepherd & Williams, 2014), global financial crisis (DesJardine et al., 2019; Sajko, Boone, & Buyl, 2021), or pandemic (Mithani, 2020; Rao & Greve, 2018) – but only considering single adversities that organizations need to address.

However, adversities are neither episodic nor infrequent, and the same organization, especially long-lasting ones, can often experience more than one adversity in its lifetime. Consequently, we only have limited understanding of the resilient responses that organizations need to employ when facing multiple adversities over time. This limited understanding is particularly regretful, as the event-based or episodic view of resilience advanced in prior research is unlikely to apply in the more realistic and frequent scenario of multiple adversities. In fact, this research falls short in explaining how an organization might build on one adversity to face the next one, or more specifically, how undergoing one adversity might lead to building and deploying resilience when facing the next adversity. Furthermore, overlooking resilience in the context of organizations facing multiple adversities over time hinders our understanding of whether what happens and developments between two adversities are important, and why. Accordingly, we ask the following research questions: *How can an organization be resilient over time through multiple adversities? What key mechanisms explain such resilience?*

As an organizational form, long-lasting family firms are particularly relevant for studying resilience over time (e.g., Salvato et al., 2020), as they are more likely to have been challenged by multiple adversities throughout their journey. The coupling of family and business systems (e.g., Habbershon, Williams, & MacMillan, 2003) places much at stake for family firms compared to other types of organizations. In particular, as they are handed down across generations through intra-family succession (Chua, Chrisman, & Sharma, 1999), their long-term orientation and strong commitment (Le Breton-Miller & Miller, 2006; Lumpkin & Brigham, 2011) incentivize them to overcome adversities, striving and surviving to ensure longevity, and thereby building resilience (Chrisman, Chua, & Steier, 2011). Indeed, under adverse circumstances, their owners face the prospect of losing

not just financial wealth, but also the emotional and relational aspects that tie the family to the firm (Berrone, Cruz, & Gomez-Mejia, 2012; De Massis & Rondi, 2020). This leads family business owners to place a great deal on the line both socioemotionally and financially in the belief that much more could be lost otherwise (Azouz, Antheaume, & Charles-Pauvers, 2022; Conz, Lamb, & De Massis, 2020; Czakon, Hajdas, & Radomska, 2022). Consequently, family firms work more assiduously than other types of organizations to protect their business when going through adversity (e.g., Lins, Volpin, & Wagner, 2013), making them particularly relevant for our research questions (Neubaum & Payne, 2021).

To conduct our study, we first identified a major adversity that was viewed as a threat to survival, in this case, by firms forced to leave their location due to the staging of the London 2012 Olympics on their land. We explored firms threatened by the Games and selected one that played a leading role in the dispute, is more than 100-years old, and has passed through four generations of family ownership. From its base in East London, the firm produced and sold smoked salmon, and as we discovered, had endured other major adversities. This offered an appropriate opportunity to study multiple adversities at multiple levels. Empirically, we integrated interviews, archival data, and observation to generate deep insights from the complex phenomenon investigated (Edmondson & McManus, 2007), including how the adversities unfolded over time, how actors prepared, faced, responded, and coped with these. Drawing on our analysis, we unpack the process through which a family firm manifests resilience throughout multiple adversities. Specifically, we reveal the multilevel mechanisms involving the family, the business, and individual leader (Habbershon et al., 2003) enabling the family firm to be resilient over time. In addition, we introduce a new concept, organizational fortitude, to describe a resilience-building approach to cope with the challenges of multiple unexpected adversities.

Our study makes several contributions. First, introducing the notion of organizational fortitude and highlighting the multilevel nature of organizational resilience (Raetze et al., 2022; Stoverink, Kirkman, Mistry, & Rosen, 2020; Williams et al., 2017), we unveil the mechanisms through which

the family, the business, and individual leader – acting as a linchpin between the family and business – contributed to developing organizational fortitude allowing the family firm to manifest resilience. Linchpins play a central role, not only by connecting the family and the business, but also driving the goals, motivating organizational actors, and bringing family capabilities into the business, thus embodying organizational fortitude. Second, we extend current understanding of organizational resilience through a process approach that encompasses multiple adversities, explaining their reinvigorating effect for an organization. To the best of our knowledge, this is the first study to longitudinally consider resilience across multiple adversities. Our research also offers implications for resilience in other types of organizations positioned at the intersection of multiple systems.

### **Theoretical Background**

Resilience is important for organizations, but remained considerably under-researched (King, Newman, & Luthans, 2016; Raetze, Duchek, Maynard, & Kirkman, 2021) until an increasing number of global adversities (such as the Covid-19 pandemic) shone a spotlight on the topic, thereby boosting its appeal across various disciplines (Hillmann, 2021). Management research has mainly adopted two different and rather disjointed perspectives in investigating organizational resilience (Lengnick-Hall et al., 2011). On the one hand, resilience is considered in terms of resistance, the ability to rebound from adverse situations by absorbing and recovering their “original shape” (e.g., DesJardine et al., 2019; Sutcliffe & Vogus, 2003). On the other hand, scholars have conceived resilience in terms of thriving under adverse circumstances, developing novel abilities and capabilities that allow the organization to capitalize on unexpected challenges, exploiting opportunities for a successful future (e.g., Branzei & Fathallah, 2021; Lengnick-Hall & Beck, 2005). According to this second perspective, resilience emerges when organizations perceive events as catastrophic and jeopardizing their existence, then triggering them to take defensive action as a response to the uncertainties that arise (Lengnick-Hall et al., 2011). In this way, they are able to deal with change and identify opportunities that may result from a turbulent environment (Coutu, 2002).

Derived from the Latin *resilire* meaning “bouncing back”, the concept of resilience emerged in

the physical sciences as a characteristic of materials able to absorb and release energy to regain their original shape. Building metaphorically on this concept, psychology conceived resilience as the ability to recuperate from the effect of external stressors (e.g., Rutter, 1987). Mostly drawing on positive psychology at the individual level of analysis (e.g., Bonanno, Wortman, & Nesse, 2004), organization-related research began to take an interest in the concept of resilience. For instance, Coutu (2002) suggested that, like individuals, resilient organizations possess three characteristics: steadfast acceptance of reality, a deep belief based on strong values that life is meaningful (i.e., ability to make meaning of events), and a stable ability to improvise. By unpacking organizational resilience, Lengnick-Hall and Beck (2005) identify its cognitive (“enables an organization to notice, interpret, analyze, and formulate responses”), behavioral (“enables the firm to learn about the situation and use resources and capabilities through collaborative actions”), and contextual (“connections and resources”) components. These authors consider organizational resilience as the firm’s ability to “understand its current situation and to develop customized responses that reflect that understanding” (p. 750). Such conceptualization of resilience as an ability has been interpreted as either a trait-like or malleable characteristic of organizations. Organizational resilience has also been conceived as an organizational capacity (e.g., Weick, Sutcliffe, & Obstfeld, 1999; Wildavsky, 1988) and capability, with both combining to effectively respond to adversities (e.g., Cho, Mathiassen, & Robey, 2007).

Despite these contributions, most research on resilience has considered the organization as a homogeneous unit affected by adversity, collecting and processing information, and making decisions about how to cope with unexpected situations at the level of the whole organization (Raetze et al., 2021, 2022). As Williams et al., (2017) highlight, there is little clarity about how different levels combine to shape organizational resilience. Simply having resilient individuals in organizations does not ensure resilient organizations, and too many resilient individuals can even be a barrier to coordinating and sharing the vision needed to respond to adversities (Hillmann & Guenther, 2021).

Furthermore, how organizations transform resilience capabilities into demonstrable resilience (Van Der Vegt, Essens, Wahlström, & George, 2015) remains unclear. In other words, whether

resilience emerges *after* an adversity (when an organization strives to recover), is naturally situated in an organization *before* adversity strikes (when it scans the environment to recognize, adapt, and absorb change), or is *latent* (it needs to be in place before deployment) (Lengnick-Hall & Beck, 2005), is a much debated dilemma labelled the “moment of resilience” (Boin et al., 2010: 7). Arising from this dilemma is the lack of consensus on whether organizational resilience should be conceptualized as either an outcome or a process (Williams et al., 2017). Prior experiences of adversity appear to be linked to subsequent resilience, but considerable variance emerges regarding the nature of this relationship. Resilient organizations may transform by achieving a new state that is more resilient than the former (Hepfer & Lawrence, 2022). While it would seem that resilience can be facilitated by learning from experience, such dynamic aspects of resilience have yet to be fully grasped (Raetze et al., 2022). We argue that this lack of understanding ensues from investigating resilience only in relation to single adversities, employing an episodic view, without examining what happens to organizations when facing multiple adversities over time. This approach is actually counterintuitive, as organizations surviving in the long run and thriving across multiple adversities are considered the most resilient. Moreover, the dominant event-based or episodic view of resilience fails to explain how an organization might build on one adversity to face the next one, in other words, how having gone through one adversity might lead to building and manifesting resilience differently. Moreover, overlooking resilience in organizations facing multiple adversities over time limits our understanding of what happens between adversities, whether what happens is important, and why this might be the case. Conceptualizing resilience as a dynamic property that “integrates processes of both adaptation and transformation and that is longer-term and inter-systemic in nature” as Clément and Rivera (2017: 30) suggest, calls for further investigations of resilience over time. In line with this perspective, we consider the theoretical characteristics of long-lasting family firms as especially appropriate to inform the literature on resilience.

### ***Resilience in Family Firms***

Resilience is important for any organization, but more can be learned from those that have survived multiple adversities and thrived over the long run (Chrisman et al., 2011; Salvato et al., 2020). Indeed, long-standing family firms are a (more) resilient form of organization, demonstrating continuity and the capacity to survive over time (Conz et al., 2020), ostensibly better at recuperating from one adversity and readier to confront the next. Research shows that family firms are influenced by concerns about intergenerational succession, family relations, and the history underpinning their long-term orientation (Miller, Steier, & Le Breton-Miller, 2003), thus offering more salient opportunities to study resilience over time. Moreover, the coupling of the family and the business system (e.g., Habbershon et al., 2003) implies they have much at stake compared to other types of organizations (Neubaum & Payne, 2021). In particular, family firm owners are more vulnerable to losing both financial and socioemotional wealth (Gomez-Mejia et al., 2014; Gomez-Mejia, Haynes, Nuñez-Nickel, Jacobson, & Moyano-Fuentes, 2007; Kotlar, Signori, De Massis, & Vismara, 2018) in the face of adversity, thus more inclined to put more on the line to protect their wealth (e.g., Lins et al., 2013). Many family firms have significant ownership concentration and ownership-management overlap, granting them substantial decision-making power (Carney, 2005). These are all distinctive features of family businesses that allow key actors from the family to exercise discretion, motivating them to engage in resilient behavior when facing adversity (e.g., Acquaah, Amoako-Gyampah, & Jayaram, 2011; Amann & Jaussaud, 2012; Brewton, Danes, Stafford, & Haynes, 2010; Conz et al., 2020; Salvato et al., 2020).

However, not all family firms are equally resilient and able to thrive in the face of adversity. Despite research underlining their suitability to study resilience, especially over the long term, little is known about family firm survival under adversity (Rovelli, Ferasso, De Massis, & Kraus, 2021). Given the infancy of research on family firm resilience, scholars have only recently begun to isolate the key antecedents of resilience, such as their distinctive social capital and family-centered goals (Azouz et al., 2022). In family firms, internal social capital is a source of psychological and emotional support as well as cohesiveness, allowing them to endure hardship following adversity and organize

in ways to expedite recovery (Salvato et al., 2020). By spanning the organizational boundaries, external social capital enables recovery by offering entrepreneurial opportunities through external connections (Salvato et al., 2020). As a family-centered goal, the intention to transfer the business to future generations spurs family firms to consider the long-term consequences of their actions, fostering endurance and persistence over time despite experiencing hardship (Czakov et al., 2022).

In step with the broader management literature, family business research has investigated resilience by focusing on responses to single adversities (e.g., Czakov et al., 2022; Salvato et al., 2020). As such, family firm resilience has tended to be depicted as a firm-level characteristic embedded within the organization and independent of the individuals involved in practicing resilience (Conz et al., 2020). Nevertheless, scholars have recently begun to analyze the role of individuals in family firm resilience, exploring the characteristics of family owner-managers and their knowledge, unveiling the relevance of meanings attributed to resilience as drivers of their resilient behavior (Conz et al., 2020). In parallel, an emergent research stream emphasizes the importance of individual-level factors by drawing attention to the role of employees in resilience (Santoro, Messeni-Petruzzelli, & Del Giudice, 2021). Indeed, the sense of security that each employee derives from the family firm in times of crisis is returned in the form of loyalty in hardship (Czakov et al., 2022). There may also be interlocking mechanisms between the family and the business systems that trigger resilience. Surprisingly, in the family firm resilience literature, the least investigated aspect is the family itself. Psychological studies of resilience show that families are capable of collectively addressing a crisis by fostering interactions among members (Miller, Ryan, Keitner, Bishop, & Epstein, 2000), carrying a greater emotional burden that promotes moral and psychological interpersonal support.

Yet, little is known about the role and behavior of family members in shaping family firm resilience (Azouz et al., 2022), or its interaction with factors at other levels. Furthermore, despite the revelatory potential of long-lasting family firms in developing resilience across multiple adversities, and the crucial role of the family in such dynamics, current research has yet to take the opportunity to unravel the dynamics of multilevel mechanisms interlocking individuals, the family, and the firm.

In particular, their response to multiple adversities is a largely untapped but important area of research.

## **Research Context and Method**

### ***Sampling and Data Collection***

Given our interest in understanding how organizations build resilience across multiple major adversities, we adopt a qualitative and longitudinal approach with the intention of building theory (Corley & Gioia, 2004; Strauss & Corbin, 1998). We rely on abduction, as it allows theory to play a guiding role at the beginning of a study then interplay with emerging concepts based on “surprising research evidence” (Tavory & Timmermans, 2012: 170). In particular, we observed that most organizational resilience studies are grounded in data collected from contexts where a single adversity has affected businesses in a specific geographic area, thereby triggering major responses at the institutional and community level. In contrast, our aim is to isolate the response of a specific organization to multiple adversities. We therefore searched for a revelatory case that had experienced a major adversity but did not trigger significant external aid from the community or institutions. To do so, in 2012 we initially focused on the London 2012 Olympics, as businesses located on the site where the Games were to be staged faced enforced relocation from land they owned and were thus in dispute with the authorities. Relocation represented a major adversity for these firms, and among those fighting relocation and the proposed compensation package were a collection of businesses calling themselves the “Marshgate Lane Group”. One of its leaders was the CEO of a family firm that had engaged in the battle to win better terms for relocation. We selected this firm because aside from playing a leading role in this fight, it fought harder and longer than others, and according to local commentators, is perceived as having survived the crisis with better outcomes than others in the campaign. We also selected this case in accordance with Salvato et al.,’s (2020) assertion that family firms offer fertile theoretical ground for studying resilience in organizations over time (Salvato et al., 2020).

The focus of our case study is H. Forman & Son (henceforth Formans), a fourth-generation family business that is more than 100 years old with 95 employees. Its core business is the production of smoked salmon, supplying retail outlets as well as hotels and restaurants. Established in London's East End by an East European emigré in 1905, four generations later, Formans is now owned and run by the founder's great grandson, Lance Forman. According to its marketing, the firm is *the oldest surviving London smokehouse*, providing an ideal case to examine resilience. After our initial exploration of the case, we learned that the Olympics relocation was not the first existential threat the firm had recently faced. In fact, the firm was struck by fire in 1998 and a flood in 2000 even before the Olympics relocation. Therefore, we saw the opportunity to engage in a longitudinal analysis of Formans as a revelatory case appropriate for building theory (Yin, 2009) and advance our understanding of organizational resilience in light of multiple adversities. Furthermore, while conducting this study, Formans was also affected by the Covid-19 pandemic (2020).

In sum, we identified four adversities after Lance joined the business. We entered the field for the first time in 2012 and continued our engagement for almost 10 years. This generated multiple occasions for "revisiting the phenomenon", important in abduction (Timmermans & Tavory, 2012: 176). During this period, we interviewed family members, current and former staff members involved in the crises, including members of the senior management team, local authority officials, the firm's lawyer, independent professionals, and local firms. We sought to generate different perspectives using multiple voices (De Massis & Kotlar, 2014), corroborating our primary interview and observation evidence with secondary data, such as internal archives, press releases, videos, and books. We also drew on the testimony of the CEO as an elite (Aguinis & Solarino, 2019) and central informant who witnessed the catastrophic events first hand and was directly involved in engineering the firm's response. Lance also published a book detailing his own personal account of the first three adversities, enabling us to draw on this secondary source to help triangulate events and their impact. Events are more likely to be readily recalled when they are dramatic, involving major and personal disruption (Cannell & Henson, 1974). In our case, the events led to dramatic outcomes including rebuilding,

relocating, and temporary closure. All the events left a powerful impression and led to traumatic experiences for all those caught up in them.

With an open-ended interview protocol, we allowed for “unanticipated statements and stories to emerge” (Charmaz, 2006: 27). During the initial round of interviews with firm members, we collected descriptive data on the firm’s profile, heritage, organizational and ownership structure, age, nature of business, and number of employees. This was followed by more probing questions informed by the organizational resilience literature in keeping with our abductive approach (Timmermans & Tavory, 2012). The probing questions were devised to explore the before and after experiences and narratives of the adversities and resilience, such as the firm’s initial response, how the adversities unfolded, how they reacted, their perceived impact, their responses as the events progressed, and the motivations underlying their actions. We subsequently asked questions, such as why the issue was so important, how actions progressed over time and in response to setbacks, initiatives adopted to find solutions, and the role of third parties. Furthermore, we focused on the firm’s internal processes and developments following the resolution of each crisis. In addition to interviews, we drew on observation during visits to the firm, phone calls, and email exchanges to clarify events and their meaning. In total, we conducted 36 interviews each lasting between 30 minutes and 3 hours. All interviews were recorded and transcribed.

During multiple site visits, we collected secondary data from company brochures combined with evidence from the family firm’s corporate website and others, press-articles, internal memos, company publications, and local online audio archives. We also collected photographic material (historic print ads and pictures of the family, the firm, its facilities, and key people caught up in each catastrophic event and the severe damage caused), and video material that included broadcast news reports and company promos. In addition, we had access to photos from Formans’ private archives, and collected others from books, newspapers, and the web. Websites of external parties, such as the Olympic authorities and government departments, were also incorporated as data sources (see Table 1). This material was used to obtain complementary perspectives of what each adversity meant for

Formans at the time it occurred with data collected while the adversity was occurring or immediately after, including from third-parties external to the organization.

(Table 1 about here)

### ***Data Analysis***

***Step I.*** Two co-authors independently analyzed the interview transcripts through thematic analysis to acquaint themselves with the data, using in-vivo coding and the NVivo software to keep track of the codes, emerging themes, and categories. We met regularly to discuss and assimilate embryonic ideas, share our perspectives on coding and identify the critical incidents and milestones, crucial for the systematic temporal bracketing of the four episodes of adversity. Next, we coded the interviews according to each adversity and then referred to secondary data, such as archives, pictures, and books, to corroborate our understanding. This entailed plotting Formans' history, ownership structure, key actors, role of the family, and developing a timeline for each key catastrophic event (see Figure 1) to facilitate understanding of the adversities, their progression, and the activities separated by discontinuities (Langley, Smallman, Tsoukas, & Van de Ven, 2013). Through this initial phase of inscription, which also served to begin the defamiliarization in our abductive approach (Timmermans & Tavory, 2012), we crystallized the events across adversities, distinguishing between the pre-adversity phase corresponding to what we refer to as "normality" and the post-adversity phase of "response to adversity" when Formans appeared to manifest resilience. Oscillating between the two phases directed our attention to key aspects not clarified in the organizational resilience literature (Timmermans & Tavory, 2012), namely (i) the process through which the firm manifested resilience, (ii) what happened in the "new normality" phase such that Formans was able to *again* manifest resilience in responding to the subsequent adversity, (iii) the role of Lance in leading the response to the adversities.

(Figure 1 about here)

***Step II.*** As time passed, we started aggregating second-order codes in relation to the recurring patterns. Early in our analyses, we observed what led us to coin the notion *organizational fortitude*

to capture the firm's approach to the "resilience building" process. Aspects of this organizational fortitude featured in informants' accounts of Formans' actions and approach, which we coded as resoluteness propensity, resource reserves, and shared values (see Table 2 and Figure 2 of our coding structure). However, it was initially unclear exactly what role this approach played in the firm's response to adversity and subsequent resilience. Another early observation was the unexpected reinforcing effect that the manifestation of resilience exerted on the firm. We noted the analytical promise of our organizational fortitude concept in relation to the concept of resilience when working back and forth between these and our various data sources as part of the "alternative casing" process in our abductive approach (Timmermans & Tavory, 2012: 177). A rich body of secondary data sources allowed us to corroborate informant accounts and enrich our understanding of the mechanisms linking organizational fortitude to manifestations of resilience in light of the guiding theory (Locke, Golden-Biddle & Feldman, 2008).

(Table 2 and Figure 2 about here)

**Step III.** While we did not explicitly refer to the concept of organizational fortitude during interviews, once indications of this response began to emerge, we posed questions probing respondents' awareness of the consequences of their behaviors. We returned to the archives and the field to gather additional data that offered opportunities to corroborate and elaborate our emerging observations. This involved assigning, reassigning, and shuffling codes to emergent categories as we added new data or sought to strengthen the surviving codes. Thematic coding was followed by axial coding where we sought to group codes according to the similarity of their meaning or concepts across the four adversities (Strauss & Corbin, 1998). In seeking to identify the practices in responding to multiple adversities, we observed a recurrent pattern across the four episodes through which Formans manifested resilience. Then, we aggregated these second-order codes into two themes: *reacting* and *proacting* (see Tables 3, 3A, and Figure 3 for our coding structure).

In line with our abductive approach and as a concrete example of the processes of revisiting, defamiliarization, and alternative casing (Timmermans & Tavory, 2012), we reconciled the reacting

and proacting themes with the organizational resilience literature and identified counterintuitive evidence as the battle that Formans fought with each adversity helped the firm switch from reacting to proacting. Reflecting on this point, we realized that we needed to dig deeper into the role of the family and the family business leader in the emerging relationship between organizational fortitude and resilience.

(Table 3, Table 3Aa, and Figure 3 about here)

**Step IV.** Our next step was to understand the relationships across levels that contribute to organizational fortitude. To do so, we first grouped statements related to the family's desire for the firm to survive and thrive over the long run into a category labelled *custodianship of the firm*. For example, we identified the importance of heritage by studying the way the firm used images of earlier family CEOs in brochures, on its website, at its premises, and on delivery vehicles. The extensive use of an old black and white photo taken in 1935 of Lance Forman's grandfather holding the largest salmon ever sold at Billingsgate Fish Market for instance underlines the importance of heritage custodianship. Overall, a careful examination of the visual material helped deepen our understanding of family influence and its role in developing organizational fortitude. Second, from our interpretation of the data and observing the emergent themes, it became clear that the individual level (in terms of the leader's role) had to be explicitly included. Again, in keeping with abduction, we sought to reconcile this emergent observation in our data with existing theory, realizing that the literature calls for further understanding the role of leadership and leaders in resilience (e.g., Williams et al., 2017). For example, Habbershon et al., (2003) critiqued early family business research, arguing that not only the family and business, but also individuals should be considered to better comprehend family businesses behavior. Therefore, given his leadership position in the family and business during the adversities, we identified Lance Forman as the *linchpin* in view of his critical and overlapping role in the family-business system. Finally, we uncovered distinctive staff attitudes of loyalty and sense of family toward the firm that we label *surrogation of the family*. To verify the emergent ideas, we returned to key informants by email or phone. Finally, we aggregated the findings at the individual,

family, and organizational level, unveiling the mechanisms that link the multi-level influences to develop organizational fortitude (see Table 4 and Figure 4 for our coding structure).

(Table 4 and Figure 4 about here)

**Step V:** At this point, it became clear that Formans' organizational fortitude influenced its resilient response to the adversities, but further clarification was needed about how this process became dynamically recursive over time across the four episodes. Therefore, we examined the reinforcing effect of organizational resilience and identified a reinvigorating pattern of increasing organizational fortitude derived from pivoting – as the last stage of proacting – that allowed the firm to enter a phase of new normality.

**Step VI:** We finalized our data structure by organizing the set of aggregate dimensions and related mechanisms into an integrative model. In so doing, we integrated the findings at the individual, family, and organizational level into a multi-level process model of how organizational fortitude helps family firms be resilient across multiple adversities, and thus analytical generalization (Yin, 2009).

## **Findings**

What had started as just another routine night between closing and opening at Formans' salmon production factory in October 1998 would ultimately prove pivotal for the family firm and its survival. Overnight, the factory burned down. This adversity and the three that followed over a twenty-year period offered the opportunity to understand how the family firm responded to and survived multiple adversities over time. Our findings help shed light on the hitherto hidden process of how a firm recovers following not one but several major adversities perceived as existential threats. In this process, we identified what we label organizational fortitude to explain how the family firm transformed from being a victim of an adversity to one where it believed it could take on any external threat, and win. Second, this work reveals how dynamics at the family, individual, and firm level impact organizational fortitude. Third, we highlight the interaction with resilience and the subsequent survival outcomes. In the following, we outline our model to capture this process and show how

organizational fortitude helps family firms be resilient across multiple adversities (see Figure 5). In particular, given the volume of data, the need for clarity in illuminating the chronological relationships between the events and attention to detail, we start with vignettes of the four adversities that Formans faced (Lok & De Rond, 2013).

(Figure 5 about here)

### ***The Four Adversities***

***Adversity 1: Factory fire (October, 1998).*** In the early hours of 2 October 1998, Formans suffered a major fire that decimated the factory where it produced smoked salmon. The building was so badly damaged that it could no longer be used, which meant not only severe disruption to its operations but also financial collapse if customers could no longer be served (see Picture 1). The first critical challenge was to try to rescue as much product as possible on the night and find a way to continue to service key customers in the first hours and days of the devastation who Formans believed once lost would never return. On the night, the fire services stood between Formans and its produce now trapped in a burning and crumbling building. The second major challenge was to maintain operations in the face of environmental health officers who were increasingly skeptical about the conditions in which food could be prepared:

*Our need was very specialist – we could only operate out of a facility with a kiln, and with hygiene standards and working conditions conducive to food production... Most importantly, we couldn't survive a period of business interruption. Our clients expected continuity of service. If we let them down for a day, we had enough goodwill to ride through... Three days, and they'd be searching for other sources of supply* (Lance, extract from "Forman's Games: The Dark Underside of the London Olympics", 2016)

(Picture 1 about here)

***Adversity 2: Factory flood (September 2000).*** Formans was running "like a well-oiled machine", it was bigger than ever, more complex, and now located in a new building. Nobody anticipated that just two years later, on a rainy morning on 30 September 2000, the river Lea would burst its banks, completely flooding the newly-built factory with large volumes of dirty sewage-infected water. The

shock was palpable, Lance felt that the business was facing an existential threat:

*“It was very emotional [...] I sort of stamped my own seal on this place and then suddenly the whole thing gets flooded, it was biblical! There was a genuine fear on my side that this could be the end of our business and that was very worrying”* (Lance Forman, interview)

The flood not only disrupted daily operations, but also compromised the fabric of the factory, again jeopardizing business operations. As Lance recounted, “As the floodwater crossed the threshold into the factory, our focus shifted. It was no longer a matter of ‘keep it out’, but ‘save what we can’. Everything that wasn’t bolted down needed to be maneuvered to higher ground” (see Picture 1). The immediate challenge was to keep production running to honor pre-orders. However, soon after the flood, another shockwave followed, and environmental health officers again had public health concerns with food production taking place in a venue where dirty flood water had penetrated the fabric of the building.

*“...the business couldn’t close down, it’s never closed down in its history, it couldn’t close down, if it closes down, we open the doors to the competition when we do reopen and so we’ve got to keep the thing going”* (Lance Forman, interview)

However, it was the rejection of the multi-million-pound insurance claim to provide new factory premises and the ensuing battle with the insurers that would prove the greatest challenge.

***Adversity 3: Olympic relocation (2005).*** When London won the bid to stage the 2012 Olympics in July 2005, more than 250 local firms and residents occupying the proposed site faced enforced relocation. For Formans, this meant not only moving out of the newly constructed purpose-built factory, but also facing the threat of being forced out of the area altogether due to soaring London property prices. Again, Formans believed this could destroy its business. However, the intensity of the adversity would increase further as the firm faced protracted and acrimonious settlement negotiations. These extended to other stakeholders, such as the local authorities, who Formans believed had the power to release sizeable plots of land and property that would allow them to stay in the area but were seemingly not offering the needed resources. This resulted in an impasse at several different points. In the meantime, the clock was ticking down to the deadline when the firm

would be forced to leave the site and bulldozers moved in to clear the ground, deal or no deal. As Lance commented, the adversity had devastating effects:

*I was livid. The knife had not only been slid into my chest, now it was being twisted. [...] I spoke briefly with my father, who understandably asked a series of questions about how I'd now save the firm that bore the family name; I was unable to give a cogent answer to any of them (Lance Forman, extract, Forman's Games)*

**Adversity 4: Covid-19 pandemic (2020).** Like many others, the firm was badly hit by the pandemic. It had been forced to close parts of its business, curtail salmon-smoking operations, and lay off staff. Given the intensifying nature of the pandemic and the increasing uncertainties, the family firm did not know when it would re-open its business or indeed resume normal trading. In addition, if the crisis lasted too long, the business might ultimately lose valuable staff along with their experience and key clients. As the crisis unfolded Lance feared the worst.

*"In that first week we were thinking, 'Oh my God, what is going on, how are we going to cope with this.' We had to think on our feet very quickly"* (Lance Forman, interview)

However, things took a further turn for the worse when a large valuable new client acquired early in the pandemic decided with no warning to withdraw its business overnight, plunging the firm into a deep financial crisis. Formans' fate was now balanced on a knife-edge.

### ***Multi-level Development of Organizational Fortitude***

Our results suggest that organizational fortitude plays an important role in how family firms confront adversity and then recover. This is an approach organizations adopt that leads to framing the adversity in such a way that they feel strong enough to confront the crisis. We observed that factors at three different levels can combine to foster the development of organizational fortitude: the family, the individual, and the firm. In particular, our data show that these act as mechanisms influencing the likelihood of organizational fortitude emerging. We label these as *custodianship of the firm* to indicate the family sense of responsibility, *linchpin leadership* to capture the critical, decisive, and overlapping role of the family and business leader, and *surrogation of the family* to reflect the

commitment of those working for the firm (for data extracts supporting these mechanisms see Table 4 and Figure 4). We consider each of these in the next section.

***Custodianship of the firm.*** Key to this theme is the strong sense of responsibility that the family feels for the continuing survival of the business. This is encapsulated in two key mechanisms: *bearing the burden of responsibility and risk* and *viewing the family firm as an heirloom*.

In this mechanism, *bearing the burden of responsibility and risk*, Formans' survival was seen as the personal responsibility of each former and current CEO. This seems to explain their willingness to not only do all they could to protect the business, but at times even put it at risk in order to save it. The business was not only their life, but family members also saw themselves as its guardian. Marcel, the third-generation CEO, had been personally entrusted with the family business to preserve its legacy by his mother-in-law. When her husband died, and although they had a daughter, Irene, there was no male heir, so Marcel was called on to take over as a matter of duty. It was a request he believed he could not refuse:

*“My wife is an only child, my mother-in-law said to me, “Marcel, would you like to come and help me in the business?” And then I came into the business full-time, and it was hard work for me, first of all getting up very early in the morning, but since, you know, I had such a very hard time in my youth, during wartime after I came to England it wasn't easy for me, but I worked very very hard, and I built up the business”*

Keeping the business alive was a heavy burden according to Marcel, and despite his lack of experience, he had made a promise that had to be honored. He even took his wife's family name, Forman, and his son Lance did the same:

*“So the business was on my mother's side. So, my mother's maiden name is Forman. Her dad is a Forman and her grandad is a Forman. My passport name is not Forman. But I'm known as Lance Forman, everyone knows me as Lance Forman. So, I've actually taken the business name and adapted it to myself.. And my dad did the same. So when my dad joined the business... in those days ...it wasn't really a woman's world, and so my dad came into the business and he just immediately adopted the surname 'Forman' so, people would know he was the boss”*

Although Lance had taken the lead in managing the fire, he had not yet taken over as CEO, but that changed when the flood happened just two years later. Once the business was handed to him, the new CEO believed it was now his personal responsibility to protect the family firm, as Lance

commented “Our 100-year-old business would come crashing to its endpoint. On *my* watch. All because of a stupid overflowing river!” There was a belief that if the family firm’s forbears could survive terrible circumstances, such as pogroms and the holocaust, the current generation could survive a “stupid overflowing river”.

It also shows that organizational fortitude can have its roots within the family, early on, where it can be inculcated in the children. We noted that when Forman descendants later took over the family business, they did not start with zero levels of organizational fortitude.

In the second mechanism, *viewing the family firm as an heirloom*, the business’ success over several generations was a strong source of pride both within the family and the firm, and contributed to the sense that the legacy must be protected:

*“I still chat with my dad, my wife, and my kids. At the dinner table we sit down and say what should we do about this so you’re still talking about ideas and problems and challenges, even if they might not be coming to work every day, they’re still... There’s always a family sense because it’s been in the family for four generations, and we still don’t know whether it’s going to a fifth generation”* (Lance Forman, interview)

Also, Marcel reflected on his son, “I think a lot of his success has to do with the business being that old and protecting the family tradition.” Given the intertwinement of the family and business history, protecting the family firm and preserving its heirloom became paramount, for example, during the Olympics relocation threat:

*“It’s something special. Absolutely. That was my main line in this battle. I talked about the Olympics destroying 100-year-old businesses; there was a sense that this was something traditional and in my family as well. This was like a family heirloom...”* (Lance Forman, interview)

We observed that as the business endured, the sense of responsibility that family members adopt can intensify even when this might engender risk.

***Linchpin leadership.*** Our data indicate that occupying the role of linchpin is critical to developing organizational fortitude. By straddling the two family and business systems, Lance as family leader was pivotal not only in combining their strengths, but his heightened sense of responsibility intensified their joint impact on organizational fortitude. Consequently, this second theme refers to the role of the individual, the family leader, and the key mechanisms through which they contribute

to organizational fortitude: *concentrating ownership* and *playing deus ex machina*.

In relation to *concentrating ownership*, researchers have shown that ownership concentration can provide owners with power over resource allocation (Carney, 2005), unlimited control over an extended period of time and private benefits (Dyck & Zingales, 2004), and engaging in particularistic behaviors (De Massis, Kotlar, Chua, & Chrisman, 2014). Control over resources is amplified when ownership overlaps with management (Smith, Nordqvist, De Massis, & Miller, 2021). Our results show that on taking over from his elderly and now retired father, Lance became the head of the family, CEO, and head of management, acting as the linchpin between the family and the business. As others and Lance himself stated, “I’m the head of my family, I’m still representing my family [...] In our business it’s a team [but I see] myself as leader... I think you have to lead by example, it’s important”. While this provides confirmatory support, there were also indications of low governance and little opportunity to challenge his decisions – and this had the effect of bolstering resoluteness:

*“When I make a decision I stick solidly by it, I never doubt my decisions once I’ve made them ... One of my strengths is being single minded when I’m determined to make something happen, I make it happen”* (Lance Forman, interview)

In the second mechanism, *deus ex machina*, there were indications that the new CEO had also played this role when he believed he could solve the crises by sheer willpower, as his mother stated:

*“[so much] hard work to put onto one person’s shoulders, and I mean he was the only one able to sort it all out, and he was amazing, it’s amazing what he can do, what he can tackle, what he can do. He came to us afterwards and said, I’ve done this, and I’ve done that, but not ‘do you think I should do this?’ or ‘do you think I should do that?’ ‘No’”* (Irene Forman, interview)

However, this also indicates his mother believed he was becoming increasingly detached and less willing to listen in his defense of the family business.

***Surrogation of the family.*** A key mechanism that helped the family firm negotiate each crisis is a strong culture of family expressed within the firm among non-family members. This provided a platform enabling the leader to act. Two second-order mechanisms at the firm-level contributed to developing organizational fortitude: *being family* and *reciprocating loyalty*.

In the first mechanism, *being family*, although the Forman family was instrumental in providing support during the crisis, none of them were directly engaged in the business anymore, with the exception of a cousin based in the US who promoted the business there. In the absence of family members, Lance built up his own surrogate family, including an operations director he came to regard as a sibling:

*“It is a family firm, I’ve got a team of people here, they feel like part of a bigger family and they get on with it, they’ve got a very good guy managing it who feels like a brother, I can totally trust his judgement and he runs it better than I would run it myself, to be honest... It allows me to actually be a bit more strategic”* (Lance Forman, interview)

This surrogate family facilitated the development of deep trust that allowed the CEO to delegate more of his operational responsibilities, freeing him to focus on each adversity. Jess, a younger employee, noted, “It’s not just about us making money. It was about family.” The largely physical and demonstrable nature of the crises served to strengthen the increasingly close-knit relations and unite the firm:

*“We were so close to it, and we’ve known the business all these years before, and Lance’s dad, father, and his grandfather before that, so we felt so emotive to be involved with that”* (Lloyd Hardwick, Director, interview)

In addition, the more the firm received support from the family, the stronger the feeling of *reciprocating loyalty*. The staff perceived the family’s strong commitment to the business as something to be reciprocated with loyalty and dedication, for instance, by working longer shifts to deliver orders. One employee commented:

*“Lance could have taken the money after the flood and the Olympics and said ‘Look, let’s close the business’ and could literally close the business and take the money and run. But he didn’t. He didn’t say, okay, let’s just sit back and take the money and close the business and we’ll all find jobs”* (Cliff Hardwick, Employee, interview)

We noted that all three levels acted as mechanisms influencing the intensity of the family firm’s organizational fortitude. The strength of each worked to enhance the family firm’s approach.

### ***From Normality to Adversity Response***

Based on our data, we identified three key components of organizational fortitude: *resoluteness propensity*, *resource reserves*, and *shared values* (see Table 2 and Figure 2 of our coding structure). When all three dimensions combine, the organization is endowed with the propensity to stand resolute, has access to tangible and intangible resource reserves, and is supported by values shared with key stakeholders, in turn fostering a sense of conviction in the face of adversity. We found that the conjunction of multiple levels impacted the development of these components of organizational fortitude, identifying the mechanisms through which they contribute to the organizational sense of resolve and subsequent resilience.

***Resoluteness propensity.*** In this theme, we note two key second-order codes that contribute to the firm's sense of resolve and subsequent resilience: *protecting the firm despite risk*, and *accepting intensifying risk*. On the night of the fire, while Formans faced a grave and rapidly deteriorating crisis, members of the family and staff gathered outside the factory. Stunned by the crisis, Marcel (at that time CEO) was slow to react, but his son, Lance, quickly stepped into the breach. Realizing that valuable stock remained in the building, he pressed the fire crew to let them salvage the contents of a walk-in fridge. However, when it became apparent that details of valuable customer orders were left on an answerphone still trapped inside the burning building, he set about cajoling, remonstrating, and persuading the firemen to buy into his narrative about the catastrophic threat to the long-established family business, and so risk re-entering the burning building.

*“Their twenty-second disappearance seemed to last forever. Would they be able to salvage enough to keep us operational for the morning’s deliveries, which we needed to dispatch in a couple of hours? Then, out of the smoke, I saw the two running back down the stairs, spluttering and breathless but with the machine held tightly. But with the baby saved, was it still alive? [...] ‘Hello, Formans, Connaught Hotel. Six sides of your best for the morning.’ Bleep. We’re in business – but only for one more morning”* (Lance Forman, extract, Forman’s Games)

Once recovered, the firm could now make crucial deliveries to its most valuable customers within hours of the fire that had decimated its factory. This willingness to *protect the firm despite risk* arose again shortly after when Lance decided to buy adjacent premises so they could continue salmon

production before any agreement was reached with the insurance company. Yet, this could also be interpreted as a reckless step that simply served to intensify the firm's risk and place it in more danger.

The decision to continue operations became the source of another major challenge and signaled acceptance of the intensifying risk. When they tried to shuttle produce between the two adjacent premises on trolleys in the open air, it began to raise serious environmental health concerns. Formans now faced a race against the clock to persuade the environmental health officers that this measure would be temporary, as Lance recounted, “[they] issued an ultimatum, ‘either refurbish what was burned or we will need to close you down!’” The company chose not to back down but pressed ahead and provided regular updates on their insurance claim in the hope of appeasing the inspectors. The insurance claim was eventually settled and a new building approved.

This sense of resoluteness did not materialize out of the blue. Even before the crisis, Marcel and the former CEOs had endured adversity and hardship that now influenced Lance's approach to adversity. The first Forman family member, Aaron (Harry), arrived in Britain from Eastern Europe at the turn of the 20th century. As Irene Forman (Lance's mother) recalled of her grandfather, “He came here very poor, brought nothing with him, escaped because of the pogroms that were going on in Eastern Europe, you know, all anti-Jewish”. For Irene's future husband, Marcel, the family's earlier life-or-death experiences were formative:

*“It's the hard times that we all had, first of all my wife's great-grandfather came here with nothing, struggled very very hard to make a living... and years later I came here, I was a Holocaust survivor, we starved for six or seven years, I was four years old when the war started and until the end of the war my family were in Siberia, and Uzbekistan, in Russia, we were taken prisoners by the Russians, while we were there during the war, there was a typhus epidemic, nearly 50% of the immigrants from Poland died of this epidemic, and most of the members of our family had died during the war in Poland, under the Nazis, which we survived... we were left with nothing really but we were fortunate enough to be brought over here to England, my sister and I, my parents couldn't get out” (Marcel Forman, interview)*

Family members strongly believe that their tough history had a lasting effect on their development and sense of resolve. Surviving the holocaust, war, and poverty was something that could be handed

down to later generations, it was part of their heritage. Lance, Marcel's son, viewed this as an explanation for his own pluck and sheer will to preserve the family business:

*"I do often reflect and think whether this survival instinct came from my father with that holocaust experience. The people who survived it, they are survivors! Maybe that survival instinct is a gene... It's the survival of the fittest"* (Lance Forman, interview)

Yet, there were indications that shortly before the fire this dimension of organizational fortitude was relatively low, as Marcel struggled to take leadership on the night of the fire. Nevertheless, another Forman was ready to step up. High trust between father and son led to an implicit, uncontested, and seamless transfer of authority. This subsequently paved the way for Lance, representing the younger and highly motivated new generation, to take over the business. This pattern of strengthening and increasing resoluteness also emerged in the subsequent crises.

**Resource reserves.** We identified this theme by considering the crucial role of *creating and leveraging relationships*, in terms of social capital, and *coordinating resource mobilization* that permitted access to a wide range of tangible and intangible resources. In coping with the fire, the first code became evident when the family firm took the rare step of establishing a relationship with a stranger who turned up on the night of the blaze offering help with restoration. Lance initially dismissed him as just another "ambulance chaser" and sent him on his way. However, after briefly reflecting, he decided to re-establish contact to see how the consultant's services might help. At this point the firm was desperate. This led to the development of a relationship with Nick Balcombe, an independent consultant and claims recovery specialist, who would go on to play an indispensable and critical role in each of the first two adversities. Engaging with a stranger in this way is notable because it runs counter to research highlighting the typical conservative nature of family firms with strong reliance on family members (Zahra, 2005; Zahra & Sharma, 2004), but coherent with recent evidence of the central role of external social capital in organizational resilience (Aldrich, 2012; Salvato et al., 2020). The willingness to engage with a stranger also suggests that, in the face of an existential threat, traditional rules of engagement in family firms may be suspended.

Balcombe's positive contribution was almost immediate. Drawing on his prior experience with

crises and insurance companies, in the wake of the fire he unearthed a hitherto unnoticed clause in the family firm's insurance policy that would allow emergency expenditure, including the purchase of premises, if it stanchied severe disruption, as Lance recounted:

*"One of the things that he advised us after the fire, which again was very useful advice that I would have had no idea of, he said that... when you insure your loss of profits...if your business is making a £100,000 or whatever, and you can't operate, then you get paid the loss of profit as well. So, that's a normal business interruption claim. What he advised after the fire was that having a one-year loss of profit is not good enough for a business... He said you really need to have three-year loss-of-profit insurance, which is obviously more expensive on premiums, but he said any business really needs that because if you make a claim, it has to be enough to deal with a massive crisis. So, we took his advice..."* (Lance Forman, interview)

Fortuitously, there was a business with a prized kiln adjacent to their own badly damaged site. Formans now had to assume the risk of acting quickly to buy the business using the firm's own cash before it knew for certain that it would be approved by the insurers. This step helped the firm stem its losses.

Formans could not have anticipated that within just a couple of years there would be a flood in the new purpose-built factory that the insurers would come to contest, and that another adversity would lead to rekindling a key former relationship:

*"It was back to Balcombe's again. It was back to the people who had helped me through the fire. Literally, the morning after I phoned them and said "Nick, you're not going to believe this but we've just had a flood! Can you help?" He was down in a flash. I had dealt with the fire now so I knew a little about how to deal with a crisis. But a flood was a wholly different incident. I had no idea about drying buildings out..."* (Lance Forman, interview)

We observed indications of Formans' agility in *coordinating resource mobilization* to address its business needs. This coordination of tangible and intangible assets relied on the sacrifice of the family across generations, as Marcel explained:

*"I came into the business full-time, and it was hard work for me, first of all getting up very early in the morning. Lance, he may not get up at the same time as I did, but certainly works very hard and some days he may not finish till ten o'clock at night. During busy periods such as November, December he works 18, 20 hours a day"*

This was also shared by the staff, as our informant, Cliff Hardwick, stated, "We all work in each other's departments, do each other's jobs wherever necessary, the way the business knits together,

it's very good." Moreover, resources available to the firm included family personal belongings, as Lance revealed, "It's not a limited company either, we're an unlimited company based on my personal belongings and house and everything is on the line."

**Shared values.** We saw that Formans' orientation to adversity was fortified by the belief that critical stakeholders shared its values, acting as a form of support. This relies on two key mechanisms: *sharing goals* and *entrenching support*. With each crisis, the firm became bolder and more assertive, secure in the knowledge that the staff and others were right behind it, as was evident during the Olympic relocation dispute:

*"Talking about the staff: They were sort of "Go on Lance!" I'd sort of become a bit of a local hero as well, I'd meet people just randomly in the streets, "Oh there's that Mr Forman, you keep fighting them". I was getting loads of letters of support"* (Lance Forman, interview)

This support strengthened the firm's belief in its own cause against relocation by *sharing goals*. Lance's comment "I was going to slay the dragon!" is indicative of this. The family firm had learned that it was not enough to be compliant or even play by the rules in the face of adversity, but be resolute or even aggressive, disrupting any sense that it could simply be cast aside:

*"That was my main line in this battle, I talked about the Olympics destroying 100-year-old businesses... we just didn't want to be washed away in a sort of Olympic tide"* (Lance Forman, interview)

The more that Formans battled against the adversities, the more this seemed to reinforce a fighting spirit across the firm:

*"I used to say to him 'if they don't give you land and the money to move, I'm going to be a suffragette. I'm going to go up there and say, 'you're not doing that to Formans', you know, because that's how strong I feel for Formans"* (Rita Law, Retired Employee, interview)

In the pandemic that followed, the firm felt buoyed by its growing goodwill and *entrenching support*:

*"The clubs we supplied would write to their members and say if you're struggling to know where to get food why don't you go to Forman & Field, they supply us, they're excellent quality and why don't you go to them, so that was nice. And even Ocado couldn't cope with all the business they were doing, and they put a Facebook message out saying if you can't get onto our website to place an order why don't you go to Forman & Field"* (Lance Forman, interview)

However, this comment suggests that organizational fortitude can potentially sow the seeds that lead to overconfidence, which can be hazardous for a firm.

Overall, our data show that by successfully confronting multiple adversities over time, a firm could build and strengthen organizational fortitude. There are clear indications that this approach can endure and contribute to a new normality that allows the firm to sufficiently steel itself for the next adversity:

*“I’m far, far better when I’m under attack than when things are going well. I can’t handle it, when things are going really well I’m not sure quite what to do, because I’ve always got too many things floating around in my head... when I’m under attack I’m totally focused on how to deal with the challenge... I sort of almost need to be threatened ... for my best to come out!”* (Lance Forman, interview)

### **Manifesting Resilience**

An important finding is that by honing organizational fortitude, Formans was better able to manifest resilience in its response to the four adversities. We observed two phases in its behavioral response, *reacting* – consistent with resilience research in terms of bouncing back from a crisis (Wildavsky, 1988), and *proacting* – taking initiative and going on the offensive (see Table 3, Table 3A and Figure 3). Taking an organizational fortitude approach, the family firm was able to not only survive each adversity, but also advance its post-adversity position compared with its pre-crisis fate. In the next sections, we chart how this was achieved.

***Reacting.*** We identified two mechanisms underpinning this theme: *fearing loss* and *securing resources and extra staff effort*. In every case of adversity, we noted that the initial response and precursor to resilient behavior was a sense of shock and fear of loss. This was the key motivation underlying the response of the two CEOs, Marcel and Lance, during the fire crisis. Marcel was quick to recognize the effect the fire would have on other family members as the gravity of what lay ahead became apparent:

*“Our daughters and immediate family were upset over it; they were all very upset. I could visualize that the business was finished, and we would have to write to all our major clients, like Harrods and Fortnum & Mason’s, to inform them”* (Marcel Forman, interview)

Watching as his father stood transfixed by shock and fear, Lance stepped in and began to take charge. It was a crucial moment in the family firm's early resilience and survival. The two leaders shared the same fear but also high trust, and this led to an uncontested and seamless transfer of authority. The threat to the family business could now be quickly processed, evaluated, and immediate actions prioritized. It subsequently paved the way for Lance to take over the business. The fear nevertheless permeated the response to the other adversities, as Lance recalled regarding the Olympics, "I don't think I've ever been so scared. There was no hiding place if things went wrong that day; no opportunity to blame the boss or blag a second chance."

A recurring feature of Formans' response was the way it rallied around the adversities by *securing resources and extra staff effort*. It was not passive but active, it was not slow to respond but swift to act, and did not allow itself to become paralyzed by the force of events but sought to maneuver its way around the sometimes fast-changing circumstances. It tried to contain the crisis by stemming any damage to stock and equipment. For example, staff provided round-the-clock help, working throughout the night during the fire and flood to allow the firm to rescue stock, clean and sanitize the premises, and maintain client orders. The flexibility and loyalty of staff were key to being able to adopt emergency measures and maintain operations. Safeguarding the staff also became an important aim during the crises. In the wake of the Covid-19 pandemic, the firm moved quickly to mitigate the impact on staff by providing its own in-house resources:

*"In the early weeks, we produced our own sort of care package, we said to all our staff, look, you can't go out to the shops, we've got food coming in here, groceries and so on, we will make like a staff shop where you can go and get all your stuff, we won't make a profit on it, we're buying fruit and vegetables, you can just take them from us at what it costs us... we basically made like a little staff shop for them... so we kept the sense of family going"* (Lance Forman, interview)

We also noted that the first crisis spurred the resolution of the next crisis. In the wake of the fire, for example, insurance claims specialist Nick Balcombe, now a friend, was able to help the firm prepare for other unforeseen eventualities by increasing their insurance cover, upgrading the facilities and processes.

The ability to cope with and manage intensifying adversity seems to be an important element of

manifesting resilience. However, our analysis suggests that while on its own it is not enough, it is the first stage.

***Proacting.*** A key step in this process is readiness to engage in more proactive behavior, potentially intensifying the risk of conflict with the perceived adversaries who had the power to resolve the crisis. We label this phase *proacting*, and identify three practices that had the effect of resolving or advancing the firm's position: *fighting the battle*, *reframing*, and *pivoting*.

When an early negotiated agreement could not be attained, Formans fought ever harder to protect its interests, and in pursuit of this became increasingly more inventive, at times moving from a defensive to a more aggressive response. We observed that its *modus operandi* entailed *fighting the battle*. During the flood for example, the crisis intensified as the insurance company balked at Formans' multi-million-pound claim to provide new alternative premises, at stake the replacement of a brand new two-year old building. Relations turned sour when the loss adjustor – about to recommend a payout – was inexplicably sacked. This was a severe setback, but Formans was not about to back down:

*“It would make more sense just to find a new building, fit that out as a smoked salmon factory and when that's ready then we move everything in... it was approved by the loss assessors and then... they were sacked by the insurance company and then the battle started and the insurance company tried to make out that there was no serious claim here... then it became a battle of wills”* (Lance Forman, interview)

A protracted battle between Formans and the newly appointed loss-adjustor ensued in which the severity of the firm's professed flood damage was contested. After months of wrangling and trying to contain the problem by appeasing the insurance officials, they hoped that a final onsite inspection would bring the crisis to an end. Instead, a battle of wits ensued, raising the stakes even further and jeopardizing a positive outcome for the firm. With experts lined up on both sides, an impasse quickly developed:

*“So, the forensic scientist turns round to me and he says ‘Right, Mr. Forman, I'll tell you what I'm going to do. I'm going to drill a hole through one of your sandwich panels to see whether or not there's flood water in it... If we don't find any flood water in the panel I want to ask you a question. Are you going to say to me that maybe that panel is not damaged, but it doesn't*

*necessarily mean that this one is not damaged [pointing] and then ask me to drill another hole in another panel to see if there's flood water in that? And if you find there's no flood water in that one, are you going to ask me to drill another hole in another panel to see there's flood water? Because I can see what's going to happen, you're going to have me drilling holes through your entire factory and then you're going to say to me the factory is totally damaged because it's got holes in it'" (Lance Forman, interview)*

Undaunted, the CEO issued his own counterattack that had the effect of dramatically increasing the stakes as well as the risks for both sides:

*"I said 'Look, I'll tell you what, I want you to answer me this question, if you drill a hole in this panel and you find there is flood water in it, are you going to say to me that maybe that panel's damage doesn't mean the whole factory is damaged and then drill another hole, to see if there's flood water in that one? Because if you're going to do that I'm not going to let you drill the first hole either'. So, we had this standoff. We eventually agreed that he would drill one hole and one hole only, and that would determine the entire claim. Risky on both parts! So, he gets his little drill out and drills his hole through the sandwich panel, everyone is standing there with their tongues hanging out" (Lance Forman, interview)*

In this instance, the forensic scientist found signs of flood water. The issues now seemed resolved. However, as the adversity unfolded, the parties remained in dispute. Four months after the insurance claim was submitted, Lance instigated what he viewed as an even risker, more audacious and precipitous response. However, this fightback also carried higher risks for both parties:

*"At that point I just didn't know where to turn and I just turned to my lawyers. I said 'Look you need to now threaten the insurance company with legal action. Which is not something I do, it's the first time I ever threatened anyone with legal action... and literally within 24 hours they completely caved in, they sacked the second loss adjustor and reappointed [the first loss adjustor]'" (Lance Forman, interview)*

Formans' pre-emptive actions eventually led to a settlement. Five years later, the same pattern repeated itself in the Olympic relocation adversity. Formans again found itself taking pre-emptive action. When the borough flatly refused to release land it owned that would allow Formans to stay in the area, Lance again went on the offensive and raised the stakes. Soon after, the firm found itself in another 'high-noon' style standoff. Following a senior-level meeting with the local borough to try to resolve the impasse, Lance again drew on a response that had been successful in the flood:

*I contacted my lawyer. I said, 'Right, I want to put the borough on notice for judicial review to find out what the hell's going on here'... I got a phone call from the chairman of the LDA within an hour, screaming down the phone at me, 'Mr. Forman, what do you think you're doing*

*threatening the borough with judicial review? How do you think they're going to help you if you're going to threaten them with legal action?' (Lance Forman, interview)*

Eventually, Formans was able to achieve a satisfactory outcome. As Lance recounted, “they panicked, and they led us eventually to this site.” Contrary to his statement that threatening legal action was not something he did, here we see indications of it becoming a learned response.

In an attempt to raise awareness about its case and to steer public discourse in its favor, we observed that Formans engaged in tactics designed to put pressure on its adversary to turn the tide. This was evident during the Olympics relocation battle as the firm mounted a media campaign with other affected firms. It sought to shape the narrative by *reframing* it and encouraging journalists to buy into an image of the firm as David vs Goliath, as in Lance’s words, “Editors would warm to the strong visual image of fresh salmon being loaded into a kiln, and journalists loved to tell the story of a plucky East End family business prospering against the odds.” The firm generated media interest in its plight by going as far as hiring a media lawyer and then canvassing news channels to pick up their story. We logged a range of short films and radio reports produced by broadcasters such as the BBC, CNN, Sky News, and other international organizations (see Picture 1). As Lance recounted, “We didn’t hire a surveyor and a real estate lawyer at all, we hired a media lawyer instead... and that was the lesson I learnt from the flood”. The family firm had learned that it was not enough to be compliant, passive, or even play by the rules in the face of adversity but seizing the initiative and being inventive in retelling its story as it saw it, even writing a book about the experiences.

We logged instances across all four cases of Formans advancing its business position in contrast to its pre-adversity state. Based on our data, we label this as *pivoting*. We observed that after every single adversity, Formans was able to leverage these to make improvements to areas of its business. Before the fire, the former premises were relatively unmodernized, and on his arrival, Lance fought with his father to upgrade operations by introducing computers so that they could cope with growth. Following the fire and the battle to keep operations going, the firm was able to rise Phoenix-like from the ashes with a new purpose-built factory with new features, such as a viewing gallery enabling

visitors to see the preparation and production of smoked salmon, and better storage and operational facilities. This helped strengthen the business and fuel growth:

*“We rebuilt a fantastic thing after the fire it was absolutely spectacular, we totally refurbished the place where we’d been for 40 years, reorganized it, used it as an opportunity to really get the place, you know, working very efficiently”* (Lance Forman, interview)

Once the battle with the insurance company was resolved following the flood, Formans was able to maximize the opportunity to upgrade its premises and facilities. Again, it was a state-of-the art rebuild, replete with all its former but better facilities. Following the resolution of the Olympics relocation adversity, Formans’ business took a further leap forward. This time the building was not only larger with more and better facilities, but in an even better location positioned a stone’s throw from the Olympic stadium and park, just across the river, with eye-catching views. The architecturally designed building, with more parking space than it previously had, was shaped like a salmon darn and painted in similar colors, as Formans liked to advertise. It featured a public viewing gallery, restaurant, and now an art exhibition and potential jazz lounge. Formans also purchased adjacent land that was turned into a mini waterfront Riviera to cater for visitors during the Olympics just across the river. Other firms affected by enforced relocation believed that Formans had managed to achieve the best outcome by far compared to themselves by resisting harder and holding out longer against the authorities than they had been prepared to do. In other words, manifesting greater resilience.

To Formans it became evident after the fire that its reliance on only one business made it vulnerable. Therefore, Lance took the opportunity to diversify and introduce a new spin-off with a partner providing a luxury food delivery service. The Forman & Fields business became a success both at home and abroad. With the acquisition of their newly-built spacious premises across from the Olympics, the firm grasped the opportunity to open its exhibition space commercially, use the lounge facilities as a jazz club style venue, and with the purchase of adjoining land, launch a Riviera style beach-lounge club right opposite the Olympics during the Games. The club offered corporate hospitality facilities and a small beach with imported sand, music, giant screens relaying the Games, and beach volleyball.

*“We’re one of the lucky ones that did a deal and moved on, and just decided that we’ve got to move on and hopefully look for the positive things in the change, and that’s what we sought to do. We thought for the sake of another few years, why don’t we keep the pause button down and let’s see how we can actually capitalize on this unique locational opportunity”* (Lance Forman, interview)

The support of staff during the pandemic became invaluable when Formans also sought to create new opportunities to replace its suspended business. It approached a home-shopping channel with transmissions in the UK and US to develop a new show selling its luxury products, including smoked salmon. The show was an immediate success with orders coming almost faster than Formans could process.

*“They became not only our biggest customer but the biggest customer in the history of our business ever. We were astonished to see the speed at which Forman & Field suddenly picked up. We knew it had the potential, but it picked up with such immense speed, and actually it became a challenge even trying to produce enough, get the food made, it was like TVSC<sup>1</sup> was going bonkers, it was like Christmas!* (Lance Forman, interview)

Proacting allowed Formans to cope with the pandemic as it hired extra staff to satisfy demand. Nevertheless, our findings also indicate that the three dimensions of *organizational fortitude* – resoluteness propensity, resource reserves, and shared values – and the mechanisms underpinning these impacted organizational resilience and the response to adversity. These influences include accepting greater risk, coordinating resource mobilization, and sharing goals, for example, enabling the family firm to manifest organizational resilience in protecting and advancing its business (see Table 2 and Figure 2). This helped the family firm not only withstand adversity (*reacting*) but also profit from it (*proacting*). We noted that this played a role in *reinvigorating* by learning from its experiences, in turn helping to prepare for the next adversity. This also boosted confidence that following the successful resolution of each adversity, the family firm could confront the risks head on, as Lance reflected:

*“... You always find yourselves at a crossroads, and you look forwards down the road ahead and it looks risky and dangerous, or you can look at the roads either side of you, which is relatively safe, and the thing is once you start heading down that dangerous road and you start dealing with risks, you find that actually it’s not so bad because the risks are being dealt with as you head down it. The problem is, if you just see the risk as far too big a risk when you’re standing at the crossroads and take a sideways road, you can never progress in life. You have to take risks and*

*you've got to deal with them and manage them, otherwise you can never progress"* (Lance Forman, interview)

Surviving one major adversity is an accomplishment, surviving four as our data indicate not only fortified the firm but also built confidence. Our findings show that Formans learned from each adversity and then applied the learning to the next, thereby enhancing its organizational fortitude:

*"A lot of businesses didn't have the experience that we had. You know, we had a fire, we've had a flood, we built a new factory, it burnt down, we then had another... You know, we have dealt with it. So, you know, we're, in some respects, in a fortunate position that we knew what to do and what it would take and how difficult it would be. So, we were sort of somewhat prepared perhaps"* (Lance Forman, interview)

We observed a pattern across the data in which organizational fortitude increased after each adversity. Based on our analysis, we believe this is because the firm had more to lose following the successful resolution of each crisis.

However, there are indications that a firm's organizational fortitude could become so strong as to have negative effects on its judgement. In June 2020, when facing the pandemic, Lance received a call from TVSC informing him that they wanted to immediately terminate the business with Formans. They had received complaints about a tweet that was incompatible with TVSC's values. Lance tried to explain that his tweet, which some complained had unseemly overtones, had been delivered in jest, "I do things with a bit of humor" and "I never intended to offend anybody". With now strong organizational fortitude, Lance attempted to push back:

*"It turns out that they're owned by a company whose Chairman is the former chairman of an organization of Libertarians, so they follow my personal philosophy, so I'm feeling a bit more comfortable here but what's really interesting actually was that the company itself had donated three quarters of a million dollars to Trump's inauguration. So, I'm thinking, they're telling me that I'm not empathetic to their values and yet their parent company and the CEO boss in America is like a Trump supporter, what is going on, this is crazy"* (Lance Forman, interview)

However, he soon realized that the conversation was not moving in the hoped-for direction. After some negotiations, TVSC agreed to occasionally have one Forman representative back on the show, but Lance was excluded. This led to the firm losing valuable revenues from TVSC. Its level of business dropped to pre-pandemic levels. It was a lesson that increased organizational fortitude can have negative as well as positive effects, and that there may be limits to its utility.

## Discussion

The resilience concept has received growing attention in management research, mirroring the adversities that organizations increasingly face (e.g., Hillmann & Guenther, 2021; Williams et al., 2017). However, by emphasizing organizational resilience in terms of pre-adversity avoidance and post-adversity response, prior research has overlooked the role of resilience in relation to multiple adversities (e.g., Raetze et al., 2022). Furthermore, we still lack knowledge about how different levels combine to shape organizational resilience. Although long-lasting family firms are theoretically the most revelatory in terms of the multilevel dynamics of resilience across multiple adversities, studies in this field have yet to fully seize the research opportunities (e.g., Azouz et al., 2022; Czakon et al., 2022). Thus, we set out to explore how family firms show resilience in the face of multiple adversities.

Drawing on an in-depth longitudinal study of a long-lasting family firm that survived and thrived over multiple adversities, our research introduces the concept of organizational fortitude. We define it as *an approach that reflects the propensity of an organization to stand resolute, access resource reserves and gain support by values shared with key stakeholders*. As an approach, organizational fortitude emerges from the interaction among the family, the business, and the family leader acting as the linchpin. Based on our longitudinal analysis, we identify recurrent patterns that we analytically unpack in the process illustrated in our model in Figure 5. Specifically, the model depicts the process through which organizational fortitude and resilience dynamically interact in responding to multiple adversities. When encountering an adversity (lightning in our model), the organizational fortitude components act as the mechanisms that enable firms to manifest resilience.

Our process model begins with an incoming arrow signaling that a firm's organizational fortitude is influenced by its prior experiences with adversity and resilience. When the organization enters a state of normality (at  $t_0$ ), the interaction of multiple levels that include the family (custodianship of the firm), the family and business leader (linchpin leadership), and the business (surrogation of the family) combine to shape organizational fortitude. When an adversity (X) hits, the firm confronts this with its current organizational fortitude, enabling it to manifest resilience by engaging in the reacting

then proacting phase. While in the reacting phase, the organization copes with fear and securing resources, in the proacting phase, it starts to fight, reframe and then pivot. In pivoting, the linchpin leader guides staff action and leverages family resources for new solutions and opportunities. Increasingly relieved and with boosted confidence, the organization is reinvigorated, in turn enhancing organizational fortitude (represented in Figure 5 by the larger rectangle in a new state of normality ( $t_1$ )). Taken together, our findings provide strong evidence of the recursive relationship between organizational fortitude and resilience, unveiling the key multilevel mechanisms through which an organization can face and thrive despite multiple adversities.

### **Theoretical and Managerial Implications**

Our study offers two main contributions to the literature. First, our analysis suggests that the individual, family, and firm contribute to developing organizational fortitude. By highlighting the multilevel dynamics characterizing organizational fortitude that lead to manifesting resilience, our findings provide added dimensionality to the resilience literature (Raetze et al., 2021; Van Der Vegt et al., 2015). This literature has begun to consider the notion of organizations as monolithic entities, acknowledging that adversities might differently affect bounded parts thereof, labelled as the “geography of strain” (Kahn et al., 2018). As such, our process model unpacks the mechanisms through which the individual, family, and business levels combine in developing organizational fortitude. In this way, we challenge the monolithic perspective by explaining how an organization does not act as a-whole-entity (Sutcliffe & Vogus, 2003), but its multiple levels interact to shape organizational fortitude then manifesting resilience to face adversities.

Research states that leadership shapes resilience at the organizational level through purposeful leadership initiatives (Stoverink et al., 2020), helping to navigate obstacles that emerge post-adversity to motivate “positive actions” toward retaining and preserving resources (Raetze et al., 2021: 635). However, scholars have urged further consideration of the crucial role of leaders (Gittell et al., 2006) in “preparing for, adjusting to, and responding to adversity as well as building endowments in a way that promotes greater resilience” (Williams et al., 2017: 752). By embracing a multilevel perspective,

our research sheds new light on the crucial role of leadership in forging organizational fortitude even before an adversity breaks, thereby creating the conditions conducive for resilience to manifest. Our study also directs attention to the critical role of individual family leaders acting as linchpins between the two key systems – the family and the business – in developing organizational fortitude. We find that by straddling and leading these two systems, the leader has more opportunity to mobilize key resources and is motivated to do so. As decision makers, leaders are also well-placed to identify new opportunities that help their organization pivot, thereby increasing the prospects of thriving in the wake of an adversity, and hence attaining a state of “new normality”. This is possible thanks to the willingness of their workforce to help, in our case reciprocating loyalty and entrenching support. Thus, our study addresses the call to further examine the role of leadership in preparing for, adjusting, and responding to adversities (Sajko et al., 2021; Williams et al., 2017).

Our second contribution is providing a longitudinal perspective of organizational resilience across multiple adversities. We do so by disentangling the mechanisms through which organizations *develop* their convictions in the face of adversity (organizational fortitude), then *using* their capability endowments to *manifest* organizational resilience over multiple adversities. Our research reveals that organizational resilience is not embodied in a “moment” (Boin et al., 2010), as assumed in studies adopting an event-based or episodic approach. These studies explore resilience in relation to circumscribed events when organizations have the opportunity to leverage institutional and social aid (e.g., Shepherd, Saade, & Wincent, 2020; Shepherd & Williams, 2014; Williams & Shepherd, 2016), based on data exploring single adversities that create a virtual fault line between the “normal” (before) and the response to adversity (after) (Lengnick-Hall et al., 2011; Roux-Dufort, 2007). In contrast, by examining the multiple adversities Formans faced, we show that it is the existence of organizational fortitude *before* adversity that allows the organization to be resilient, in turn reinforcing organizational fortitude *after* adversity, in a state of new normality – thus a virtuous cycle. We show that the episodic view of organizational resilience characterized by a schism between studies focusing on the pre-adversity period (e.g., Almklov & Antonsen, 2010) and those examining the aftermath

(e.g., DesJardine et al., 2019; Williams & Shepherd, 2016), hence considering the “moment of resilience” (Boin et al., 2010: 7) as the turning point between the two periods, does not hold in the more realistic and frequent scenario of multiple adversities over time. Our data reveal that it is the combination of the three key components of organizational fortitude – resoluteness propensity, resource reserves, and shared values – that enhance an organization’s conviction in the face of adversity, enabling it to manifest resilience and reach a “new normality” with a reinforced approach to adversity. Organizational fortitude is thus not attained at a single, episodic point in time, but is cumulative. By illuminating how an organization might build on one adversity to face the next, or how having gone through one adversity might lead the organization to build and manifest its resilience (through a reinvigoration mechanism that leads to enhanced organizational fortitude) when facing subsequent adversities, we reveal the importance of the period between two adversities. Engaging in practices across the family, business, and individual level, such as a shared narrative of the adversities (in our case, even publishing a book) and the battles won, contribute to enhancing resource reserves, shared values, and resoluteness propensity. In this way, we challenge the dominant episodic view of resilience as arising from a given adversity, supporting the long-assumed – but never studied – notion that organizations are reinvigorated by manifesting resilience in responding to adversities. Our work encourages scholars to adopt a more reiterative lens that encompasses the impact of multiple adversities. Thus, our investigation overcomes the traditional temporal reductionist approach focused solely on the response to an isolated adversity by unpacking the importance of the “history of strain” as the historical pattern that helps organizations face multiple adversities over time.

The multilevel and longitudinal perspective in our study offers insights to the family business resilience literature. Family ownership concentration spurs family businesses to engage in resilient behavior when their firm’s survival is threatened (e.g., Conz et al., 2020; Salvato et al., 2020), since a substantial ownership stake and control over an extended time period provide owners with private benefits (Dyck & Zingales, 2004), such as granting jobs to the next generation or maintaining family harmony (Berrone et al., 2012). Consequently, family businesses are often portrayed as particularly

resilient, with family members willing to make extreme sacrifices to keep the business afloat (De Massis & Rondi, 2020; Salvato et al., 2020). Our study unpacks the interplay between the family and the business where the family business leader acts as a bridge between the two systems in engendering organizational fortitude and resilience. We do so by unveiling the interlocking effect of the family as custodian of the firm (heirloom and responsibility) and the business as surrogating the family (loyalty and feeling), a combination locked in by the linchpin family business leader. As a result, we deepen current understanding of the role of the family (Azouz et al., 2022) as well as the individual (Habbershon et al., 2003) in shaping organizational resilience in family firms.

Although our study offers insights into the most ubiquitous form of business organization in any world economy (La Porta, Lopez-de-Silanes, & Shleifer, 1999), namely family firms, the implications are also relevant for other forms of business with multiple overlapping systems, such as private-public partnerships, social enterprises, amongst others. Future studies of these different types of organizations could examine whether the overlap of other sub-systems gives rise to different types of leadership and forms of organizational fortitude.

Our study also offers important managerial implications. We had barely emerged from the Covid-19 crisis when Russia's invasion of Ukraine marked the beginning of yet another crisis. Energy prices have soared, persistent inflation threatens standards of living, and raw material and labor shortages make it difficult to meet customer and other stakeholder expectations. Many firms are now facing successive waves of adversities over time, and the so-called polycrisis (European Commission, 2022), has become a reality. In fact, an episodic or single adversity view of resilience is anachronistic. Taking a step forward, some policy analysts have also introduced the term "permacrisis" (Rubiera, 2022) to denote an extended period of difficulty resulting from a series of unprecedented, catastrophic events, defining the era in which we live. Our findings are therefore particularly timely and important, as managers, business owners, employees, and policymakers are increasingly interested in understanding the drivers of organizational resilience over multiple crises. Based on our study,

organizations can learn how to construct an approach that allows them to face adversities with conviction.

### **Limitations and Future Research Directions**

Although our study paves the way for a richer understanding of organizational resilience, it is not free from limitations. Based on a single case, and although facilitating a deep and longitudinal understanding of the organizational resilience dynamics, future work could build on larger samples to examine, for instance, whether and how differences in the length of their history and heritage affect organizational resilience. We also encourage comparative replications of our analysis in different settings to increase our knowledge of how varying contextual conditions in different organizational settings impact the manifestation of organizational resilience. For instance, it is likely that manifesting organizational resilience depends on access to resources and their quality, such as human, social, emotional, and material capital, which can vary among different organization forms. In addition, we know that different organizational settings variously shape social relationships in and around work (e.g. Duncan, 1973; Høiland & Klemsdal, 2022; Kossek, Lewis, & Hammer, 2009; Stensaker & Falkenberg, 2007), which may have an impact on organizational resilience. Future research could also build on our insights to design real-time rather than retrospective studies.

Observing an organization that was thriving up to the point of facing its first major adversity allowed us to isolate an initial condition of “normality” when the firm had surpassed the struggle of setting up the business. However, although in its fourth generation, we were unable to identify when and how organizational fortitude originated, whether it emerged from the family, as we assume from the experiences and testimonies of family members who endured the holocaust, for example. Future studies could adopt a different approach to temporal bracketing by tracing organizational resilience from business inception.

In addition, our evidence suggests that a virtuous cycle may ultimately become vicious if organizational fortitude becomes so strong that the firm feels invincible, thereby negatively impacting its framing. This is illustrated in Formans’ fight with TVSC during the pandemic: the feeling of

invincibility led the firm to pay less attention to the mores of the external industry environment in which it operates, ultimately paying the high price of losing its contract with TVSC, leading to substantial losses in revenue. We therefore encourage scholars to investigate whether there is a too-much-of-a-good-thing effect that reduces the marginal benefits of organizational fortitude and/or triggers negative consequences. We suggest this could provide new and insightful implications for research on the dark side of organizational resilience, which remains underreported and under-researched (Branzei & Fathallah, 2021; Williams et al., 2017; Williams & Shepherd, 2016). On the other hand, there may be factors that jeopardize organizational fortitude, thereby leading firms to manifest less resilience. Future research could delve deeper into the reinvigorating mechanisms to examine what hampers this effect and unveil the deteriorating mechanisms.

Finally, we acknowledge that our results derive from the observation of dramatically irreversible and heterogeneous adversities that did not allow the firm we studied to restore the situation as before, namely just bouncing back. However, research on resilience has identified a learning process through which an organization enduring adversities becomes more capable of sensing the imminence of a (similar) adversity, so that it is better able to prevent it (Raetze et al., 2022). Our research design did not allow us to observe whether Formans would be able to prevent a reoccurrence of the same adversity, such as another fire or flood. Lastly, future studies could examine multiple firms collectively that are subject to the same adversity, tracing their evolution longitudinally to explore whether some of mechanisms that emerged in our study lead to developing more organizational fortitude and resilience.

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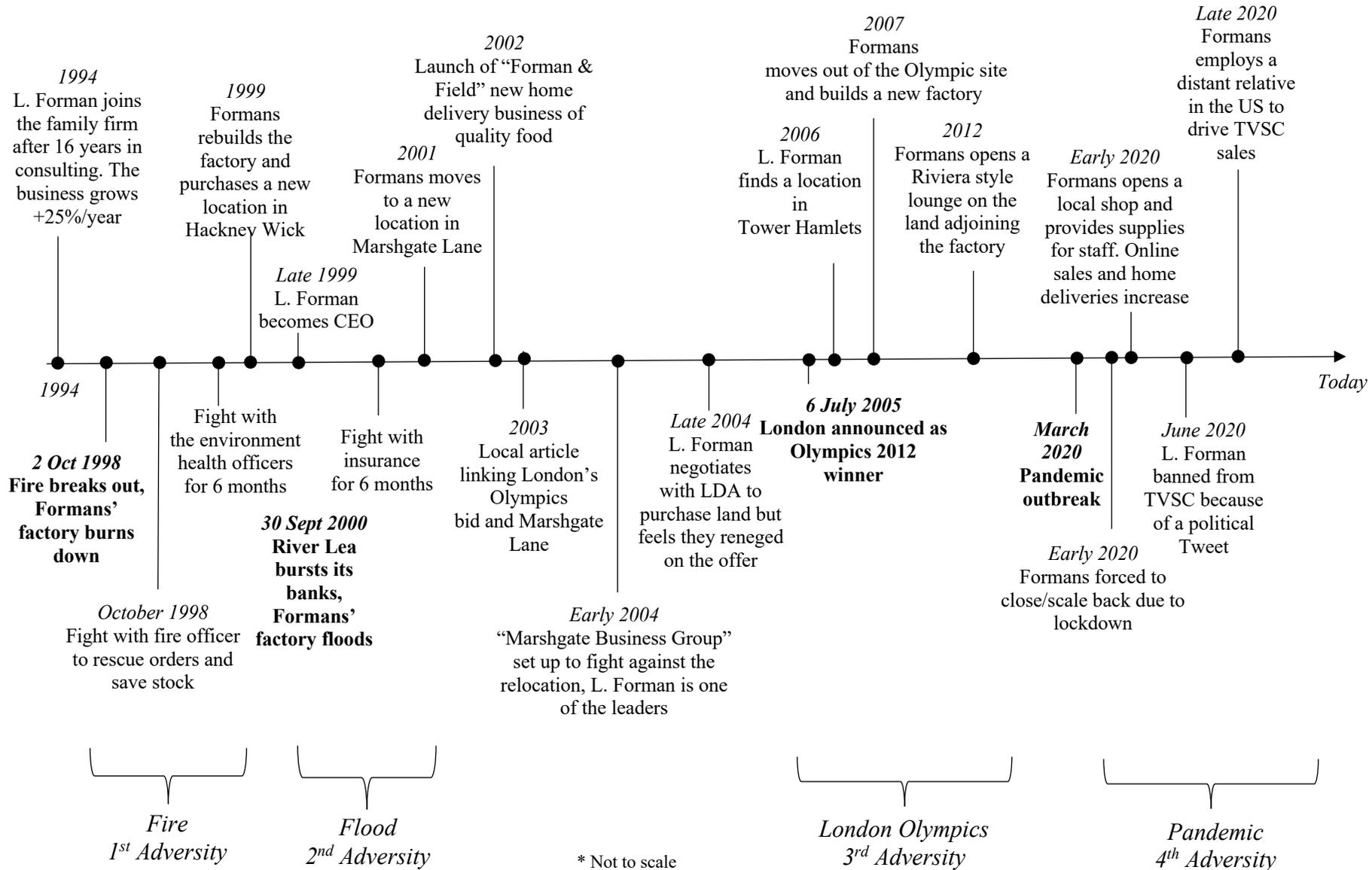
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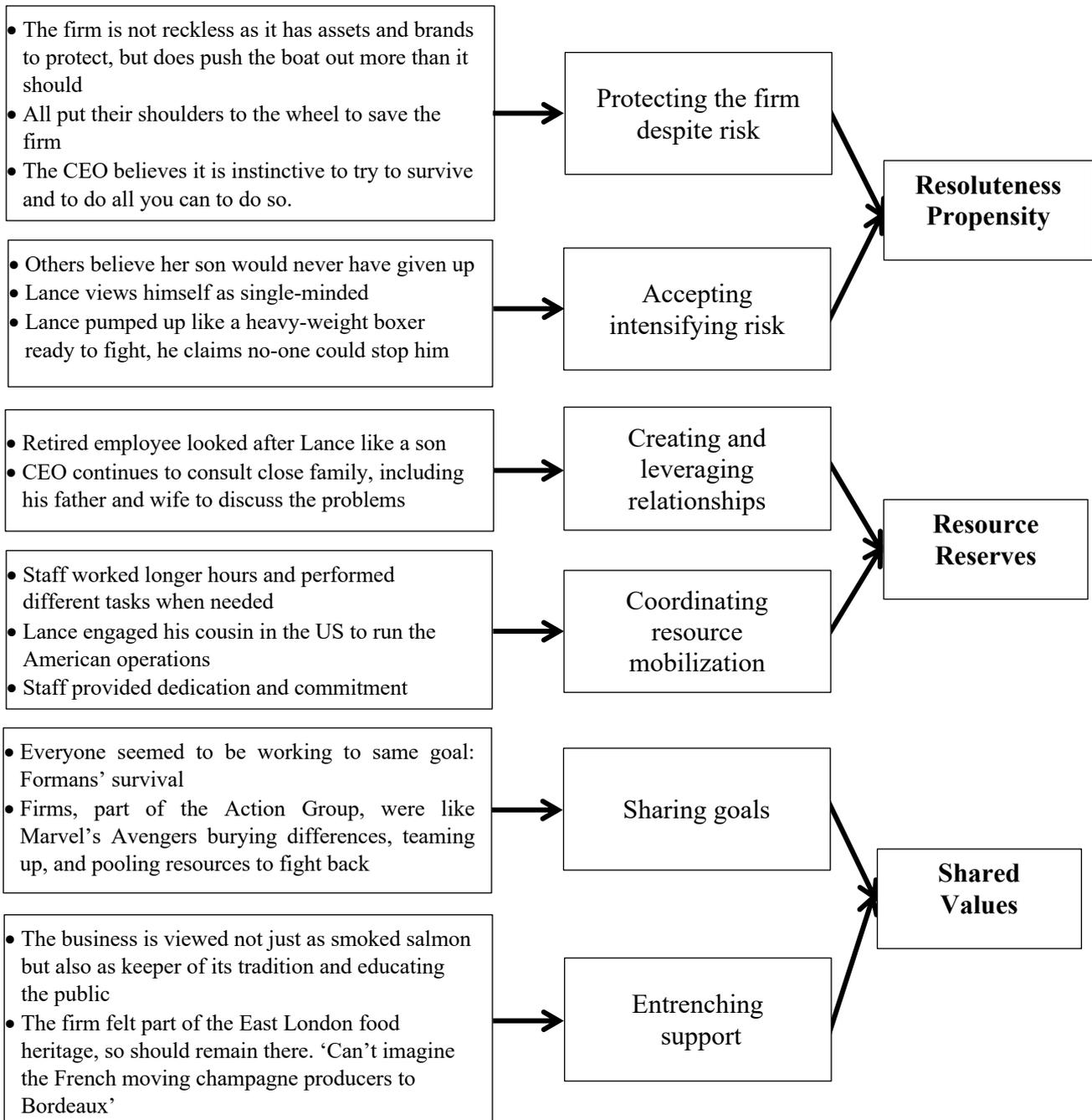
**Figure 1**

H. Forman's & Son after Lance Forman joins the family business



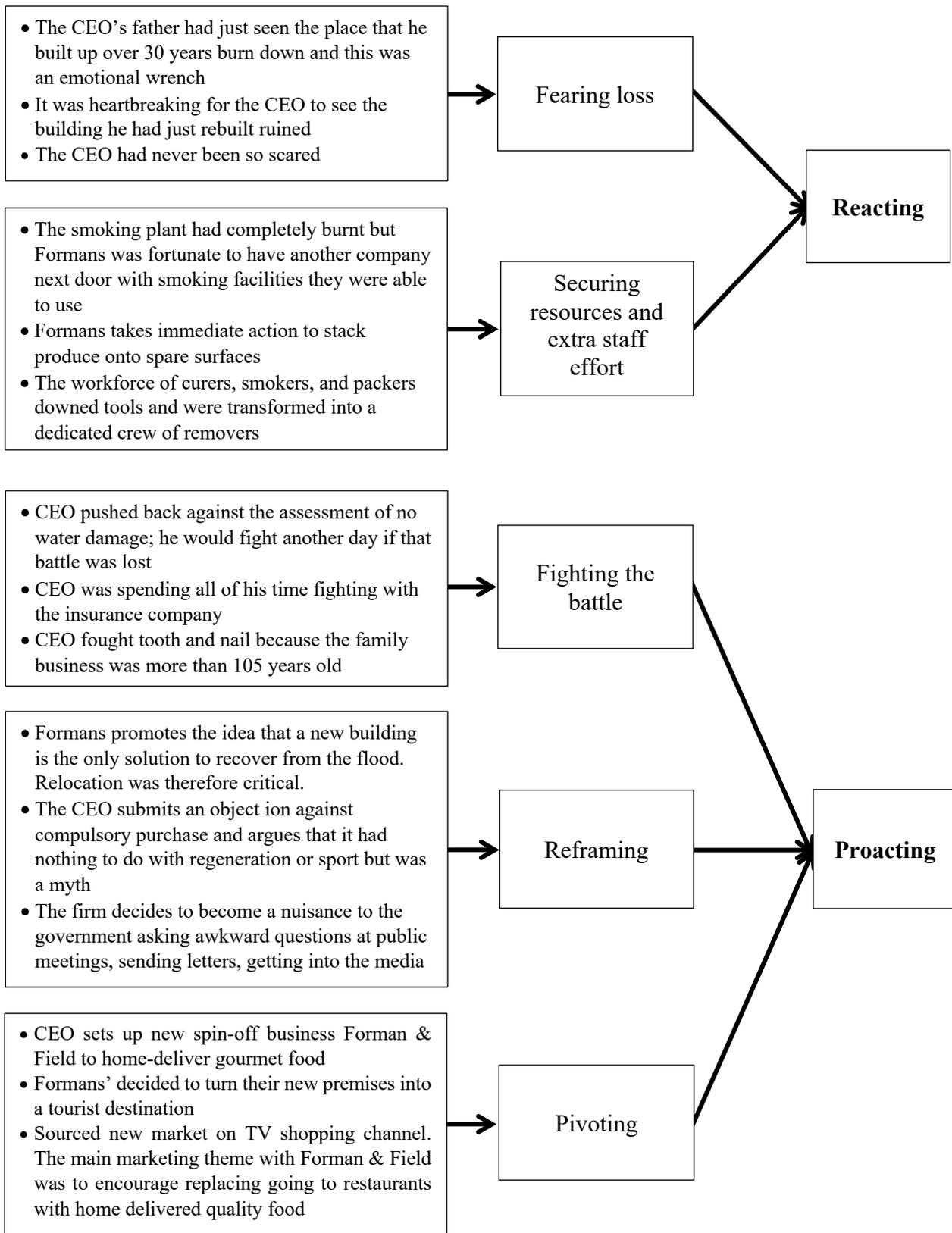
**Figure 2**

Coding structure: Organizational Fortitude



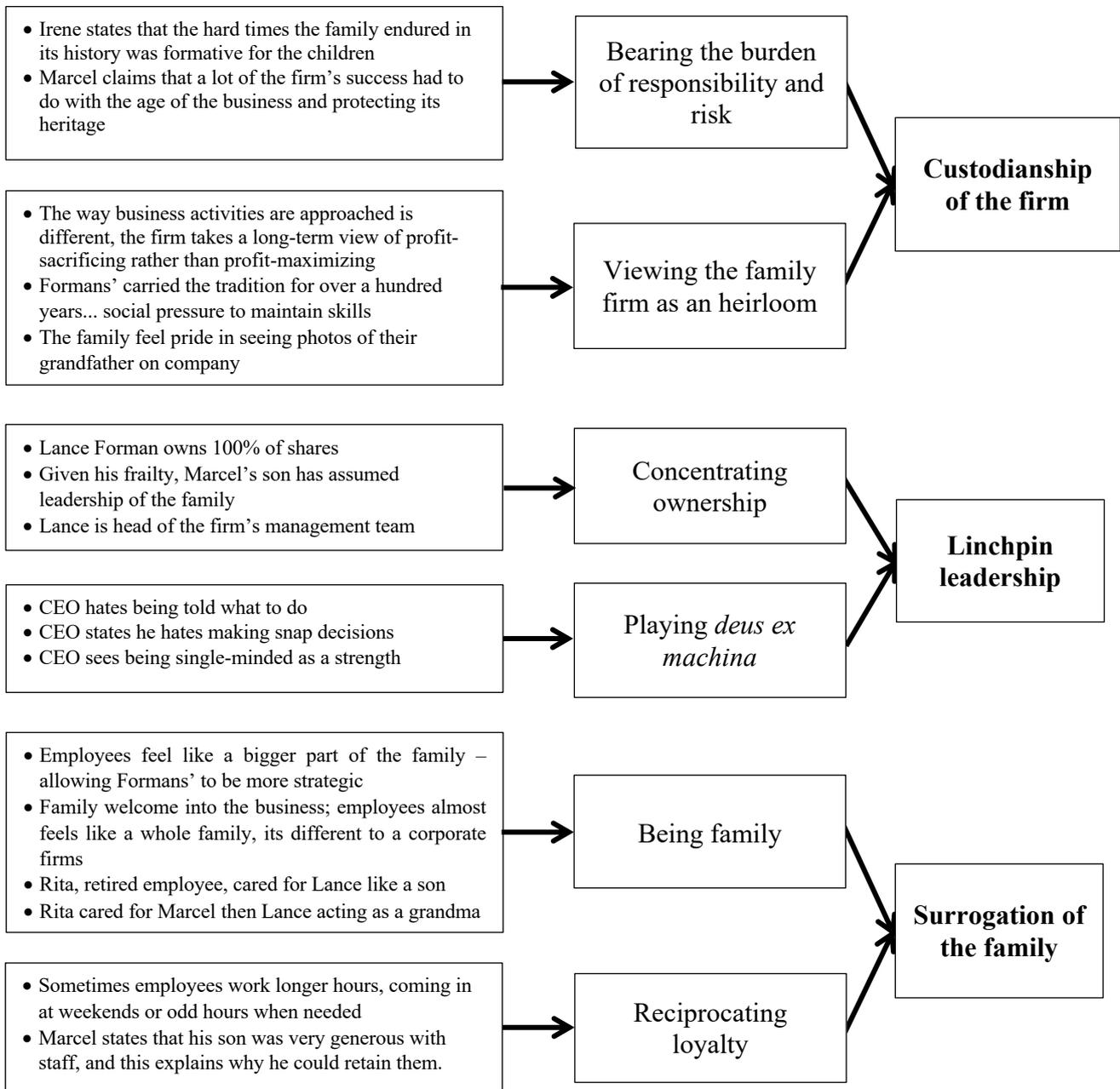
**Figure 3**

Coding structure: Response to adversity



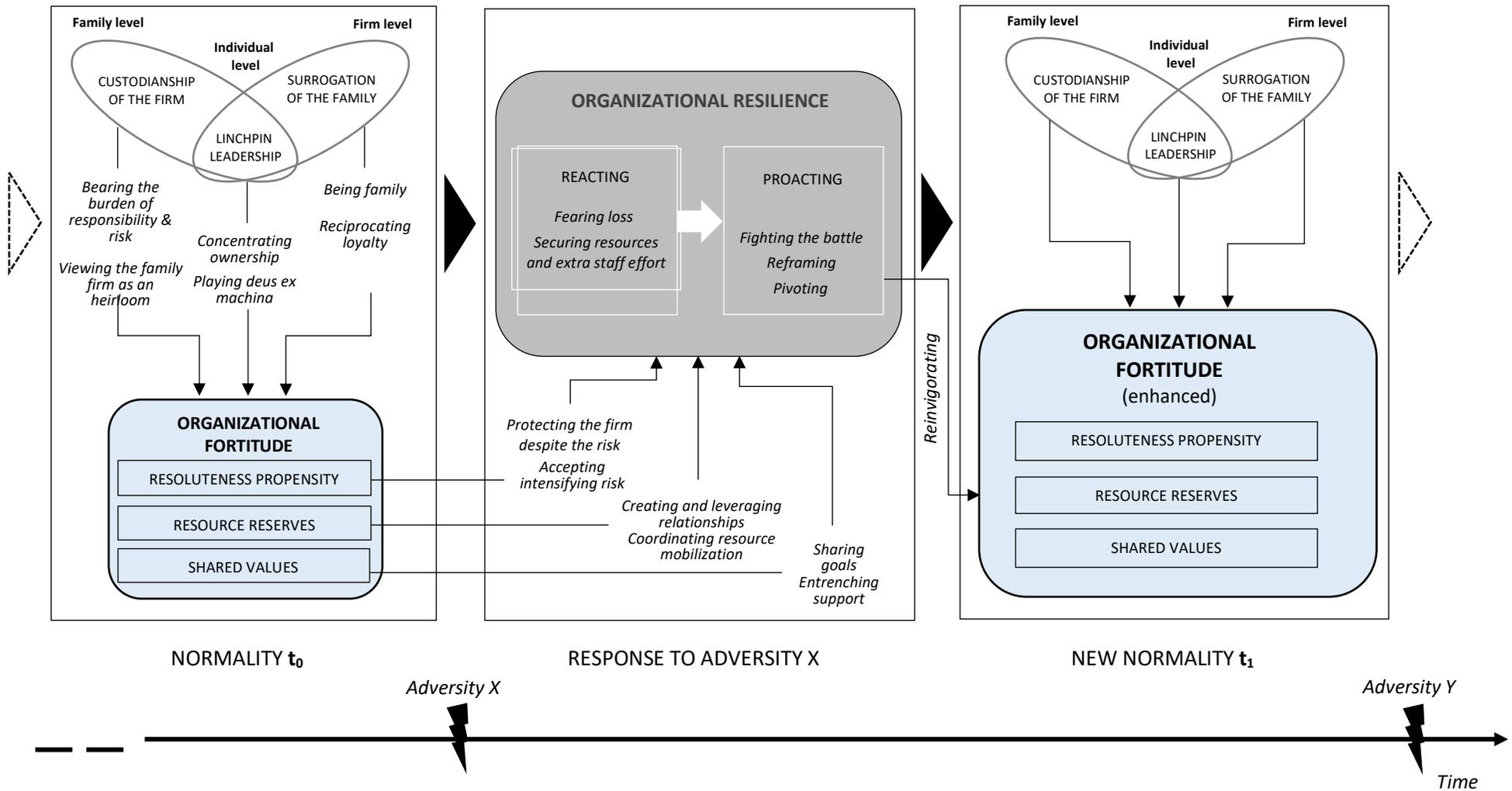
**Figure 4**

Coding structure: Multilevel influences



**Figure 5**

A process model of how organizational fortitude allows family firms to manifest resilience across multiple adversities



**Table 1**  
Data sources

<b>Data Types</b>		<b>Amount [Duration]</b>	<b>Use in the analysis</b>
<b>Primary Data</b>			
<i>Interviews</i>	Lance Forman, CEO (fourth generation)	9 [17.5h] + 7 telephone calls + emails	Gain insights of the company history, perceptions of adversity, practices employed in their responses
	Operations Director	1 [1h]	
	7 Employees	7 [7h]	
	1 Retired employee	1 [1h]	
	Irene Forman, CEO's mother, and Marcel Forman, former CEO and Lance's father	1 [3h]	
	Local Officials (3)	3 [1.5h]	
	Lawyer	2 [2h] + 1 telephone call	
	Journalists (2)	2 [2h] + 1 telephone call	
	Local business owners	10 [15h]	
<i>Observations</i>	H. Forman & Son corporate event observation		
<b>Secondary data</b>			
<i>Book</i>	Lance Forman's book "Forman's games: The dark underside of the London Olympics" (Forman, 2016)		Temporal bracketing and additional accounts of adversities. Contextualizing data in narrative accounts
<i>Company documents</i>	Formans own videos Photographs of fire aftermath at Formans Photographs of flood waters at Formans from various press articles H. Forman & Son corporate brochures		Understand the context, chart the historical roots of the business, and how the adversities affected Formans' survival
<i>Press release</i>	Newspaper articles retrieved from Nexis		Determine press coverage, interpretation of adversities and Formans' reaction
<i>TV records</i>	Various TV news reports about Formans' Olympic stadium battle including CNN, BBC, ITV		
<i>Websites</i>	Department for Digital, Culture, Media & Sport (DCMS) website East London local history websites London Organizing Committee of the Olympic Games (LOCOG) website		
<i>Other reports</i>	LOCOG reports		

**Table 2**  
Organizational fortitude: Selected evidence

Theme	Resoluteness propensity
<i>Protecting the firm despite risk</i>	<ul style="list-style-type: none"> <li>• We're not reckless because we have an asset and a brand to protect so we don't want to be reckless with it, but you know I do push the boat out probably more so than others might (Lance Forman, interview)</li> <li>• Olympics: During the battles of the company, we all just put our shoulders to the wheel to help because we knew that Lance was fighting to save the company – so we did whatever we could to help out (Forman employee, interview)</li> <li>• Pandemic: It's instinctive, it's no effort, it's just instinct, it's survival, you just do whatever you can, it's almost... it's intuitive. You don't sort of sit down and have long discussions, oh shall we try this, you just do it (Lance Forman, interview)</li> </ul>
<i>Accepting intensifying risk</i>	<ul style="list-style-type: none"> <li>• Olympics: "You would never have given up" said René. "I know you too well. But I feel sorry for the others who did. Not everyone has your drive and determination, Mr Long Game" (Book extract, <i>Forman's Games</i>)</li> <li>• I'm very single minded (Lance Forman, interview)</li> <li>• Olympics: By the night of the Town Hall meeting, I was as pumped up as a heavyweight boxer entering the ring for the final round of a world championship title fight in Las Vegas. This would be my moment, and nobody could stop me from milking it (Book extract, <i>Forman's Games</i>)</li> <li>• Olympics: We've had our eye off the ball for the last eight years really. Five of those were forced because we were fighting a battle, and people think we're much bigger than we are because we get lots of publicity. We're not a big business, we're a small family business and when the owner manager of a small business takes a five-year sabbatical, the business suffers (Lance Forman, interview)</li> </ul>
<b>Resources reserves</b>	
<i>Creating and leveraging relationships</i>	<ul style="list-style-type: none"> <li>• I got my cousin in Chicago to run the American part of it, so... (Lance Forman, interview)</li> <li>• I still chat with my dad and my wife, and my kids and you know, at the dinner table we sit down and say what should we do about this, so you're still talking about ideas and problems and challenges, and you know, even if they might not be coming to work every day, they're still... (Lance Forman interview)</li> <li>• (Talking about a long-term employee, Rita) She's retired, she was the most wonderful lady, she looked after Lance as if he were her son. She used to make sure that he was eating properly, that he was drinking properly (Irene Forman talking about a former employee, interview)</li> </ul>
<i>Coordinating resource mobilization</i>	<ul style="list-style-type: none"> <li>• Sometimes we work longer than we should, come in at weekends or odd hours when needed (Admin Assistant, interview)</li> <li>• Olympics: In the moments following the announcement, all my workforce were champions, their dedication and commitment [are] as deserving of a gold medal as anything that would be taking place on the 100m track in 2012 (Book extract, <i>Forman's Games</i>)</li> </ul>
<b>Shared values</b>	
<i>Sharing goals</i>	<ul style="list-style-type: none"> <li>• Flood: Everyone seemed to be working towards a shared goal – the survival of Formans (Book extract, <i>Forman's Games</i>)</li> <li>• Olympics: The Marshgate Lane Business Group was east London's equivalent of Marvel's Avengers. There comes a time when the threats to planet Earth are so dire that a single superhero, battling alone, cannot prevail. Facing the gravest danger, resources need to be pooled, and our heroes must swallow their pride, bury their differences and team-up to fight back against the merciless alien perils (Book extract, <i>Forman's Games</i>)</li> </ul>

<p><i>Entrenching support</i></p>	<ul style="list-style-type: none"><li>• Our business is not just smoking salmon, but to act as keepers of an extraordinary tradition, with the mission and desire to educate the public on how this traditional food should be made (Lance Forman, Forman, Website)</li><li>• Olympics: We felt we're part of the food heritage of this part of town. If it was in France, you wouldn't imagine the French moving a champagne producer to Bordeaux. Smoked salmon was founded in the East End of London and that's where we should be. So, my sole guiding principle was that I shouldn't have to be out of pocket through this process (Lance Forman, interview)</li></ul>
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**Table 3**  
Formans manifesting resilience in response to each of four adversities

Phases	Practices	Adversities and Responses			
		<b>Fire, 1998:</b> <i>Formans factory burns down</i>	<b>Flood, 2000:</b> <i>River Lea overflows and Formans factory is flooded</i>	<b>Olympics, 2003:</b> <i>Enforced relocation to make way for the London 2012 Olympics</i>	<b>Pandemic, 2000:</b> <i>Global pandemic: Formans forced to close/scale back</i>
Reacting	<i>Fearing loss</i>	The Forman family sees the building burning down and fear that the family business is lost after almost 100 years.	Lance perceives the flood as the end of his career in the brand new headquarters he has recently built.	Lance fears the family business can't survive relocation to outside the local area due to LDA plans to build the Olympic site on their land.	The firm worries about the financial effects of the national lockdown. The restaurant is closed.
	<i>Securing resources and extra staff effort</i>	Lance pressures fire officer to re-enter the burning building to recover valuable customer orders. They buy the premises next door to quickly acquire a replacement kiln.	Lance persuades health inspectors to allow smoked salmon production to continue temporarily in the flooded building despite their health concerns.	Formans tries to secure local land with LDA making the purchase on their behalf. The firm negotiates with LDA to get extra time to vacate the site. New premises are hastily constructed in less than a year.	The CEO purchases medical equipment to support staff. Impromptu grocery store set up to help staff during lockdown. Shifts are reorganized to ensure staff safety and maintain operations.
Proacting	<i>Fighting the battle</i>	Formans struggles with finding a replacement building. Lance battles with health inspectors to maintain operations on the badly burned premises.	The insurance company resists reimbursing Formans' claim, lasting 6 months. Both sides hire forensic scientists; a stalemate ensues during onsite inspection.	Pressure from government to relocate mounts. Lance is one of the leaders of the Marshgate Business Group mobilizing affected firms to fight against the relocation terms	Formans' resists expulsion from the shopping channel show selling its products on TVSC. This serious setback is mitigated by a personal ban of the CEO, Lance.
	<i>Reframing</i>	Formans' presents the threat to survival as the loss of a valuable 100-year-old family business. This narrative was used with the fire crew.	Lance argues the need for a new building and not repairs.	Lance issues a threat to take the local authorities to court; the firm is offered a deal. Formans hires a media lawyer to publicize the case/win public support	Lance presents his offending tweet that angers the channel as just a 'joke'.
	<i>Pivoting</i>	Formans realizes it can rebuild the factory on the same site and enlarge it by acquiring the adjacent business. Capacity and efficiency increase. Son takes over the business from the father.	Formans' builds new premises offering more space and opportunity for more complex operations. Lance launches Forman & Field, a new gourmet food home delivery business.	The new location is the closest building to any Olympic Stadium ever built; Formans takes advantage of the tourism opportunity, opening a Riviera style lounge on the land adjoining the factory to cater for the Olympics. A restaurant, event venue, and art gallery open on the factory site.	Lance sought a new market and identified the shopping channel, TVSC. It sells Formans' products live via a dedicated show. Online sales increase; a distant relative is hired in the US to drive TVSC.

**Table 3A**  
Reacting & proacting: Selected evidence

<b>Theme</b>	<b>Reacting</b>
<i>Fearing loss</i>	<ul style="list-style-type: none"> <li>• Fire: My father’s just seen the place that he built up over 30 years burning down, that was an emotional sort of wrench for him (Lance Forman, interview late 2016)</li> <li>• Fire: I felt heartbroken, absolutely, yes, we had a call at, I think it was one o’clock in the morning. [...] I could visualize that the business was finished (Marcel Forman, interview)</li> <li>• Olympics: I don’t think that I’ve ever been so scared (Lance Forman, interview)</li> </ul>
<i>Securing resources and extra staff effort</i>	<ul style="list-style-type: none"> <li>• Fire: The smoking plant was completely burnt out, but we were fortunate in the yard where there was another company smoking mackerel and cheaper fish, and they allowed us to use their facilities to smoke salmon there (Marcel Forman, interview)</li> <li>• Flood: First, that meant boxes and crates that had been left on the floor were stacked onto any spare table surface. Files on the lower shelves of our cupboards and cabinets were moved up. As the waters continued to advance, and the tables wobbled under the onrush, anything of business-critical value was lifted higher still. (Lance Forman, extract, <i>Forman’s Games</i>)</li> <li>• Olympics: With the deliveries under way, my workforce of curers, smokers and packers set down their tools and transformed into the most dedicated crew of removal workers anywhere on the planet. We had precious few hours to transfer everything that wasn’t nailed down from Marshgate Lane to our new facility. Steel tables, salmon blades, vacuum packers, office furniture, files, memorabilia – the mantra was simple: nothing of value could be left behind to fall victim to the blades and rippers of the returning bulldozers (Lance Forman, extract, <i>Forman’s Games</i>)</li> </ul>
<b>Proacting</b>	
<i>Fighting the battle</i>	<ul style="list-style-type: none"> <li>• Flood: Well, I just thought right at the back of the mind, even if there’s no water in there, the whole thing was so ridiculous anyway because I had photographs from before, they came down and witnessed it themselves the whole place is three feet underwater so I just thought I would sort of fight another battle if that one failed (Lance Forman, interview)</li> <li>• Flood: Oh my time was the biggest resource, yeah, this was just all my time was devoted to this battle with the insurance company. (Lance Forman, interview)</li> <li>• Olympics: He wanted to keep it as an East End business because it was 105 years old... he fought tooth and nail he did, we all did, it was worth fighting for a company like that. When the press came around we made that clear (Rita, retired staff, interview)</li> </ul>
<i>Reframing</i>	<ul style="list-style-type: none"> <li>• Flood: The only practical option was a new factory in terms of both fulfilling our immediate obligations and securing our longer-term viability. After twenty-nine years in Queen’s Yard, relocation was now critical (Extract, Lance, <i>Forman’s Games</i>, p. 106)</li> <li>• Olympics: I put in an objection to the compulsory purchase, as did all the businesses... I basically built up a case that... the reason for the compulsory purchases was nothing to do with regeneration, that was just a myth. It was really about sport and therefore the whole nature of the compulsory purchases was wrong and shouldn’t go ahead (Lance Forman, interview)</li> <li>• Olympics: “We decided to become the biggest nuisance to the government and authorities. We asked awkward questions at every public meeting, bombarded them with letters and got ourselves into the media” (Extract, Lance Forman interview in Dockland Advertiser)</li> </ul>
<i>Pivoting</i>	<ul style="list-style-type: none"> <li>• Flood: With Forman &amp; Field we started supplying private individuals anywhere up and down the country from John O’Groats to Land’s End, and they buy the same sort of quality of food that we’ll supply to Michelin star chefs, delivered to their home, dinner parties, that sort of thing. So, those two businesses were operating from that site (Lance Forman, interview)</li> </ul>

	<ul style="list-style-type: none"><li>• Olympics: I had a vision of Formans as a tourist destination. If I was to commit over £1 million to the purchase and installation of new kit, it would be a terrible waste for it to be hidden from public display (Lance Forman, interview)</li><li>• Pandemic: At Forman &amp; Field our main marketing theme was twofold. Part of it was ‘you can’t go out to restaurants so why not have restaurant-quality food delivered to your home’, that was part of it and the other part was, we’ve all got elderly relatives or vulnerable people that can’t go out to the shops because it’s dangerous, so we produced something called the Ultimate Care Package and it was like a collection of really just amazing comfort food and people bought, we sold tons and tons of that, that was brilliant. [...] So suddenly we were doing tons and tons and tons of business with TVSC, I mean it was tons (Lance Forman, interview)</li></ul>
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**Table 4**  
Multilevel influences of organizational fortitude: Selected evidence

Theme	Custodianship of the firm
<i>Bearing burden of responsibility and risk</i>	<ul style="list-style-type: none"> <li>• Marcel always talks about the past, and always has that feeling, wanting to do better, get on and do more, enough is never enough, he wants more, and I'm not talking about more financially, I'm talking about more in a different way, as you probably understand. And that's how Lance is. [...] It's the hard times that we all had... The history of grandfather, knowing about that and knowing all the connections. I've told my children and they in turn have related to their children, I think that has kept the business going. (Irene Forman, interview)</li> <li>• A lot of his success is to do with the business being, that old, and protecting the heritage. (Marcel Forman, interview)</li> </ul>
<i>Viewing family firm as heirloom</i>	<ul style="list-style-type: none"> <li>• The way we approach our business activities is different, we think long term and we don't have to present forecasts to a Board and pay shareholder's returns year on year, we just take a very long-term view, we have a profit sacrificing strategy rather than profit maximizing strategy. [...] I'm thinking even forward to the next generation, what will the next generation do with the business should they decide that they want to come and get involved (Lance Forman, interview)</li> <li>• With any family business you're continuing the tradition I guess, certainly when I was younger [...] there was a sort of pressure of history, of continuing the tradition. Formans is carrying on the tradition of what we've been doing for over a hundred years and there were lots of other salmon smokers like us but they've all died out in the last twenty or thirty years so we are now the last surviving and the way in which we produce our product is quite unique and I almost feel to some extent there's almost a social pressure to maintain the skills and the methods that we have because it's even a cultural pressure because it's a historic process. [...] it's more [than] sort of just continuing the tradition and hoping that it will carry on into future generations. (Lance Forman, interview)</li> <li>• In all the brochures come up photographs of grandfather, me, I think he's proud (referring to Lance) and he's continuing the family business which has been successful fourth generation. I feel very proud when I see the vans, the family photos around, when we go to a restaurant or we go abroad, we find on the menu it doesn't say just smoked salmon, it says, Forman's smoked salmon. (Marcel Forman, interview)</li> </ul>
<b>Linchpin leadership</b>	
<i>Concentrating ownership</i>	<ul style="list-style-type: none"> <li>• Lance Forman now owns 100% of the family business shares</li> <li>• Marcel retired from the business is now elderly and frail, and Lance has assumed leadership of the business</li> <li>• Lance Forman is head of the firm's management team but has a non-shareholding co-director</li> </ul>
<i>Playing Deus ex machina</i>	<ul style="list-style-type: none"> <li>• I hate being told what to do (Lance Forman, interview)</li> <li>• I'm not somebody that makes snap decisions, I do think long and hard about decisions that I've made but when I make a decision I stick solidly by it, I never doubt my decisions once I've made them. (Lance Forman, interview)</li> <li>• One of my strengths is being single minded when I'm determined to make something happen, I make it happen. (Lance Forman, interview)</li> </ul>

<b>Surrogation of the family</b>	
<i>Being family</i>	<ul style="list-style-type: none"> <li>• It is a family firm, I've got a team of people here, they feel like part of a bigger family and they get on with it, they've got a very good guy managing it who feels like a brother, I can totally trust his judgement and he runs it better than I would run it myself, to be honest... It allows me to actually be a bit more strategic. (Lance Forman, interview)</li> <li>• We sort of treat them, it does feel like the family and if you ask the staff that work here, they do feel part of the family in some respects which I don't think you get so much in general corporates. [...] We're not very contractual here, legally obviously you must have employment contracts but even with my key employee, we've had a bonus structure in place since he was first employed but we've never ever stuck to it, it's always been just discussion and it just depends based on trust, always based on trust and that's why he's been with me 20 years now and we're inseparable. It's just, because at the end of the day pieces of paper are worth nothing, relationships are, you know, that's what counts. (Lance Forman, interview)</li> <li>• (Talking about a long-term employee, Rita) She's retired, she was the most wonderful lady, she looked after Lance as if he were her son. She used to make sure that he was eating properly, that he was drinking properly. (Irene Forman talking about a former employee, interview)</li> <li>• She cared for me originally and then for Lance, like a big sister, and taking care like a grandma. (Marcel Forman talking about a former employee, interview)</li> </ul>
<i>Reciprocating loyalty</i>	<ul style="list-style-type: none"> <li>• Sometimes we work longer than we should, come in at weekends or odd hours when needed (Admin Assistant, interview)</li> <li>• He's very generous with staff, that's why he keeps staff, and I kept staff 20, 30 years (Marcel Forman, interview)</li> </ul>

**Picture 1**  
Photos of Formans' adversities

Aftermath of the fire: H. Forman & Son in 1988



Flood waters at H. Forman & Son in 2000



New H. Forman & Son premises opposite the London 2012 Olympic stadium



Lance Forman appearing on CNN report and in own video film



H Forman and Son tells all about relocating for the Olympic Park

Picture 1 cont....

Screenshot of Lance Forman's cousin introducing their product on the shopping channel during the pandemic. The product is later itemized as 'not available'



We're sorry.  
This item is not available at this time.

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<sup>i</sup> To preserve anonymity, we label this channel TVSC