

## **HOW FAMILY BUSINESS MEMBERS LEARN ABOUT CONTINUITY**

### **ABSTRACT**

Continuity is about connection and cohesion over time. A defining question in the study of family business is how the family and the business can endure and survive across generations. Learning about continuity is fundamental in addressing that question. This study explores how family business members learn about continuity. It draws on concepts of communities of practice and legitimate peripheral participation derived from Lave and Wenger's (1991) situated learning perspective. These are used as theoretical lenses to explore the relationship between family members and learning through an interpretive and inductive study of 18 respondents from family businesses in Canada. This study shows learning in the family business context is about continuity, but the process of learning in which the family engages is uneven, non-linear, and unpredictable. To deal with these complexities and learn about continuity, family members participate in multiple ways, often gradually over time. In this study gradual participation to build legitimacy is revealed as a multi-generational learning phenomenon. It involves multiple forms of co-participation influenced by family members from the past, present and future.

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## INTRODUCTION

Family firms are distinctive and this affects the complex processes in which they engage (Naldi, Nordqvist, Sjoberg & Wiklund, 2007; Sharma, 2004). While various theoretical frameworks have been used to explore the peculiarities of family firms and how these influence their distinctive nature (Lubatkin, Schulze, Ling & Dino, 2005; Miller, Le Breton-Miller & Scholnick, 2008; Zahra, Hayton, & Salvato, 2004), there is a paucity of conceptual and empirical work targeted at understanding learning in family firms (Hamilton, 2013; Moores & Barrett, 2002; Sharma, 2004). When it comes to understanding how family members learn from each other in a way that ensures the continuity of the family business and its practices, this is especially the case (Discua Cruz, Howorth, & Hamilton, 2013).

A situated learning perspective offers a way to deal with this gap. It adopts the view that learning takes place in situated practice, that it is socially constructed, and/or socially situated in everyday practice (Contu & Willmott, 2003; Hamilton, 2013; Lave & Wenger, 1991; Roberts, 2006). The social context of any family business is unique and represented by a specific set of behaviours, skills, norms and values shared by the family through social interaction (Hall and Nordqvist, 2008; Kotlar and De Massis, 2013; Sharma, 2004). Given how relevant the social context is for family businesses, a situated learning perspective seems a critical approach to understanding learning processes.

For the theoretical foundation of this study, we draw on two concepts from Lave and Wenger's (1991) situated learning theory. The first is community of practice. A community of practice is a social structure where learning takes place through participation in every day practice (Lave & Wenger, 1991). It consists of a set of social relations where learning is embedded (Brown & Duguid, 1991; Handley, Sturdy, Fincham & Clark, 2006). Building on

Lave and Wenger's (1991) original approach we argue that family business can be conceived as a community of practice and theorised as such; it is not static but on a trajectory based on 'shared histories of learning' (Wenger, 1998, p.86). The second concept is legitimate peripheral participation (Lave & Wenger, 1991). Legitimate peripheral participation is a dynamic relationship where those with experience, knowledge and understanding work alongside others who need to learn from the existing community of practice. This concept describes how newcomers join a community of practice through engagement in social practice. Increasing levels and different forms of participation, establish the legitimacy of participants and enable their becoming full members of that community (Hamilton, 2013; Handley et al., 2006; Wenger, 1998). Adopting this concept, we interpret how learning takes place over time through examining the processes of participation integral to everyday practice in the family and the business.

Through our study, we address the research question, *how do family business members learn for continuity?* We examine empirical material from 18 respondents from family businesses in Central Ontario, Canada, using an interpretive and inductive approach (Gephart, 2004; Hall and Nordqvist, 2008; Jaskiewicz, Combs and Rau, 2015). We focus on "know how" learning, that is how family members learn to ensure continuity, how they learn about, for example, core values and specific business practices. Through iterative analysis we show learning for continuity takes place at the intersection between the family, the business and the wider set of overlapping communities in which the individual family member is embedded. Drawing on the concepts of communities of practice and legitimate peripheral participation, we develop knowledge about how older family members are eventually replaced by younger family members in a way which ensures continuity of the business.

This study makes the following contributions. First, we build on Habbershon, Nordqvist and Zellweger's (2008) ideas about transgenerational aspects and Salvato and Corbetta's (2013) calls for more understanding about the nurturing and development of successors. In challenging the assumptions of Habbershon et al. (2008), we show learning for continuity is an unpredictable process between individuals engaged in a specific family business context. Previous work points out that the transfer of formal business knowledge and skills is core to the succession process (Salvato & Corbetta, 2013). We reveal the relevance of informal mechanisms and illustrate different routes to establishing legitimacy to run the family business. Hence, we bring into question typical timeline assumptions surrounding the concept of legitimate peripheral participation and existing models such as the 4Ls framework (Moore & Barrett, 2002). Second, recent studies have called for more work to consider how context might influence family business (Wright, Chrisman, Chua & Steier, 2014). Learning has been described as an inherently social as well as an individual phenomenon (Tusting, 2005). And while the literature notes that previous researchers have 'embraced the theoretical strength of situated learning theory', it also recognises that 'conceptual issues remain undeveloped' (Handley et al., 2006: 641). Learning about continuity is about family members developing the capability to sustain the business across generations (Habbershon et al., 2008). Through our study we demonstrate the relevance of family bonds, engagement and the social situations encountered to show why social context needs to be taken into account when theorising learning.

Through their relationship with their social context, our respondents gained legitimacy at different times and through different levels and degrees of participation. This shows that for those involved in educating family business members, the nature of learning and how it varies needs to be taken into account. It can be argued that education programmes for family

business need to be more specific – even bespoke – in their design and implementation. Situated learning settings may help develop a family member’s understanding of the past, present, future, and how it all fits together. Family members may not automatically develop the skills, knowledge, and behaviors that lead to meaningful participation in a family business. By examining a key aspect of situated learning theory, we argue that the concept of legitimate peripheral participation can be better used to inform the design of education for family businesses.

### **LEARNING IN THE FAMILY BUSINESS: LITERATURE REVIEW**

Learning is a difficult concept to define (Hergenhahn & Olson, 2005; Illeris, 2009). While there is no single definition of the term, it is understood that learning represents an ongoing *process* through which knowledge is acquired and generated and that through this process changes in behavior are apparent and can be observed (Harrison & Leitch, 2005; Hergenhahn & Olson, 2005).

Although several explanations of learning are offered in the literature, including cognitive (Mitchell, Busenitz, Bird, Marie Gaglio, McMullen, Morse & Smith, 2007), experiential (Corbett, 2005; Rae & Carswell, 2001; Zhang, Macpherson & Jones, 2006) and behavioural (Holcomb, Ireland, Holmes Jr. & Hitt, 2009; Lumpkin & Lichtenstein, 2005;), such approaches have been criticised for failing to account for the influence that others can have on the learning process. Hence, there is an emerging view that to understand how those engaged with business learn, interest needs to move away from approaches that separate learning from the context in which it takes place and instead look at the role and influence of context on the learning process (Brown & Duguid, 1991; Lave & Wenger, 1991; Wenger, 1998).

Learning is a process which is integral to everyday situated practice in business, family and other social settings (Hamilton, 2013; Handley et al., 2007). Some suggest that the most effective learning occurs when knowledge is specifically tied to the context in which it is used (Zhang et al., 2006). This situated learning perspective has generated support for three reasons. First, it allows us to appreciate that learning is not entirely a cognitive process. Second, it recognises that experience does not always lead to learning. Third, it emphasises the critical role social relations and social context can play in the learning process.

In their development of the situated learning perspective, Lave and Wenger (1991) introduce the concepts of communities of practice and legitimate peripheral participation. They argue that the processes of legitimate peripheral participation in existing communities of practice provide the means of achieving continuity over generations (Lave & Wenger, 1991:114). Legitimate peripheral participation is a dynamic mode of engagement in practice, implicated in social structures. Legitimacy within a community of practice is established by increasing the levels and extent of participation alongside those with experience and knowledge (Wenger, 1998; Handley et al., 2006; Hamilton, 2013). It therefore helps explain how through social interaction, newcomers join existing members of a community of practice.

### **Communities of Practice and Legitimate Peripheral Participation Within the Context of the Family Business**

Family businesses rely heavily on interpersonal social relationships (Hall & Nordqvist, 2008). These relationships inform how family business members learn. So in turn, social context shapes and forms learning outcomes and the nature of the family business. Building on Lave and Wenger's (1991) original approach we argue that family business can be

conceived as a community of practice and theorised as such. Lave and Wenger (1991) in setting out their choice of apprenticeships as empirical illustrations, state that they could have focused on the process of children joining adult worlds (p.32). One of their empirical examples describes learning how to become a midwife, detailing forms of legitimate peripheral participation as family members join the community of practice of the midwives (p.68). The family as a site of situated learning, and making a living, is clearly acknowledged in the original theorizing of communities of practice and we extend that to the context of contemporary family business.

Through different forms of participation newcomers are integrated into the community of practice by experienced members (Lave & Wenger, 1991). Newcomers gain knowledge of family business norms and practices, rules and obligations. They may participate in ways that are prescribed and limited, that is at the periphery. However as newcomers become more experienced, fuller participation is negotiated and this becomes more valuable to the functioning and the continuity of the community of practice. As they are recognised as being more competent, they move to full participation at the core of the community of practice.

While communities of practice have been under-investigated empirically by learning scholars, what this concept seems to offer is a mechanism for understanding the dynamics between individuals and the social context in which they are immersed (Cope, 2005; Hamilton, 2013; Taylor & Thorpe, 2004). And, while very little is known about how family members learn about their family businesses (Moore & Barrett, 2002), what we do know is that younger family members engage in the learning process early on in life, and often they learn about the family business before entering it (Jaffe, 2007). Experiences are shared between family members and through communicating and interacting with each other,

understanding about the family business builds (Tagiuri & Davis, 1996). As a consequence, family members become better positioned than non-family members in communicating about that particular family business. Indeed, these shared experiences and interactions create a sense of identity (Wenger, 2009; Hamilton 2013) and so family members have a better understanding than non-family members about the way the family business operates, its rules of engagement, norms, practices, obligations and commitments and the etiquettes for how business in that particular context is done.

In applying the lenses of communities of practice and legitimate peripheral participation to the context of the family business, we take the view that learning is an interactive process between family members and their social context (Hamilton, 2013; Zhang et al., 2006). Our choice of lenses helps us to consider the bonds between members of a family and how these family bonds might represent a way to ensure continuity of the business. Moreover, they allow us to look at things within the context in which they take place. We therefore see that appreciating the socially situated nature of learning offers a particularly promising avenue to further understanding about learning in family business.

## **METHOD**

Our research question was *how do family business members learn for continuity?* Our qualitative approach was interpretive and inductive and purposefully aimed at generating understanding about the lived experiences of respondents (Gephart, 2004; Hall and Nordqvist, 2008; Jaskiewicz, Combs and Rau, 2015). Through this approach we were able to focus on understanding interactions associated with learning which takes place within the family business context.

### **Empirical Setting**

For the study reported here, respondents were individuals in small- and medium-sized family businesses located in a relatively small city (population 75,000) in Central Ontario, Canada, located 100km away from Toronto. All interviews took place in this setting. As a result, it is acknowledged that the experiences and events observed may be exclusive to this specific situational boundary (McKeever, Jack & Anderson, 2015).

### **Sample and Data Collection**

Purposeful sampling was used (Pratt, 2009) but as the research progressed, we drew on snowball sampling (Martin & Eisenhardt, 2010). In the early stages of the study, decisions were required about whom to interview within the locality. Since there was no existing local family business database, the decision was made to generate one. This database was developed based on knowledge of the local population. Names of individuals were drawn from, for example, organizational memberships, personal contacts, phone books, websites and local publications. This led to a database of 200 potential respondents. These potential respondents were then sent invitations to participate in the research project. This led us to identify 40 respondents who were involved in different family businesses and who were willing to be interviewed. Those contacted had to acknowledge that they were involved in a family business as a family business member and what their role in that business was. Where the individual who had been contacted was not the appropriate person, the invitation was passed to a member of the business who was. These individuals were all involved in private business and so details regarding annual revenues and the numbers of employees were not publicly available.

The lead researcher then began the process of interviewing respondents in-depth. The extent and depth of data collected was monitored and considered throughout the data collection process by the research team. Of these 40 respondents, 18 were of particular interest for the issues we were specifically concerned with here and so we purposefully took the decision to work closely with these respondents. The rich and informative manner in which these respondents explained their situations provided quality and depth in data, allowing our research question to be addressed (Chenail, 2009; Pratt, 2009; Reay, 2014). Details of these 18 respondents are included in Table 1.

#### **INSERT TABLE 1 ABOUT HERE**

Field work and data collection were carried out by the lead member of the research team who was familiar with the locality and research context. His background and knowledge meant he was theoretically sensitized with the knowledge, skills and awareness required for carrying out qualitative research (Glaser & Strauss, 1967) but he was able to be neutral and non-judgmental in interviewing and reporting.

The literature generated pre-understanding and helped inform the questions asked. Respondents were interviewed for up to four hours about their experiences of learning for continuity and the situations they found themselves in. Interviews were loosely structured but a flexible interview schedule was used. This schedule started with fairly broad questions to get conversations going. Subsequent questions came about in conversation between the lead researcher and respondents. However, the interview schedule also contained a list of topics relating to our interests to guide the conversation. Approaching the interviews in this way increased the researcher's confidence; it also meant he could focus on the participant, the way

the conversation was progressing and so plan ahead. This approach also permitted notes to be generated to support the emerging discussion and the coaxing of respondents where necessary about experiences and situations. Like previous work (McKeever et al., 2015), this approach ensured insight emerged from the data and the actual situations respondents found themselves in.

Of the interviews, 14 took place at the location and premises of the family business, allowing behaviour and environmental conditions to be observed and anecdotes, actions and processes to be recorded (Charmaz, 2006; Yin, 1984). The remaining 4 interviews were held in the researcher's office, since there was no convenient or quiet place to meet at the participant's workplace. None of the businesses were sold or bankrupted during the period of this study. They could, therefore, be understood as a sample of family businesses achieving continuity in the sense of enduring and surviving over time, across the generations.

### **Data Analysis**

Interviews were recorded and then transcribed verbatim. Field notes, observations and raw data were pulled together. This material was then reduced before being sorted into descriptive categories and explanatory themes through a process of searching for emerging patterns and commonalities which explained the situations of our respondents (Bruton & Ahlstrom, 2003; McKeever et al., 2015; Miles & Huberman, 1994), and hence fitted with our research question (De Massis & Kotlar, 2014; Eisenhardt, 1989; McKeever et al., 2015).

The explanatory themes identified in the data and also present in the literature were: family bonds, engagement and social situation. Data were examined for detail relating to these themes. So, conversations around experiences and situations such as "parents learning from

children” and “going to the market with dad” became key. Throughout, analysis was iterative in that ideas emerging from the data were held up against the literature (Hall & Nordqvist, 2008; Salvato & Corbetta, 2013) with the constant comparative approach providing a way to review data with emerging categories and concepts (Alvesson & Sköldbberg, 2000; Bansal & Corley, 2012; Glaser & Strauss, 1967; Jack & Anderson, 2002;).

So, our data analysis process was guided by Jack and Anderson (2002) and McKeever et al. (2015) and informed by De Massis and Kotlar (2014) and Graebner et al. (2012) in that first we searched all data for patterns or themes relating to our interests. Second, we refined these themes into descriptive categories. An identified theme became a category when we were able to define it descriptively in such a way that we could distinguish it clearly. Descriptive categories were then synthesized into analytical categories which when brought together helped explain the situations of respondents (Bansal & Corley, 2012). This process took several months but through interpretive analysis we were able to generate understanding about how our family members learn through social interaction. This process of grounded research was supported by the interaction between the lead researcher, respondents and data (Suddaby, 2006).

## **FINDINGS**

In this section we present the evidence from our findings to illustrate how family business members learn about continuity, organized around the emergent explanatory themes of family bonds, engagement and social situation. This section is informed by Bansal and Corley (2012), Salvato and Corbetta (2013) and Reay (2014) and their suggestions about how qualitative work should be presented. To ensure we reflect the situations of respondents, we use “power quotes” from the data (Bansal & Corley, 2012; Pratt, 2009).

## Family Bonds

For each business, family was very clearly present and connected to the business in some way, shape or form. Family was an integral part of its activities, albeit in different ways. For some – Beckett, Catalano, Fulton, Harvey, Mitel, Parte, Swain, Triport and Winson – this involvement was direct whereby family members were very engaged with the day-to-day operations of the business. While others – Bark, Block, Fosken, Jaker, McGorman, Scone and Stewart – did not have family members directly employed in the business on a day-to-day basis, but their engagement and influence was still very evident. Jaker and Block explained the importance of the family bonds in supporting continuity in the family. Jaker pointed out that this acts as a reminder for all about what the business actually stood for and represented: *“In terms of involvement in the store, she’s [Mother] not there too often but when she is, everybody loves her and it brightens the place up and reminds everybody that it is a family business”*. Block, on the other hand, described how one of the defining characteristics of a family business was that “one person” holding things together *“There’s always one person in the mix that holds it together. In the old days it was the mother that held the family up. It’s not always the mother anymore. I think there’s somebody that’s involved in the ongoing day to day business that keeps it together”*. Family presence is therefore important, even if it can take different forms.

The family relationship was a bond which worked to bind things together, even when the relationship with family was difficult, as in the case of Block for example: *“I think a common thread is that blood is thicker than water in the sense that you could yell and scream and bitch and throw things but when it comes right down to it, family’s family”*. Alternatively, Westwood articulated how family bonds clearly influence all aspects of the business because

the business in effect is the family: *“We’re also very finicky as to what type of business we wanted to do and my parents were of the mind that this isn’t just a business. It’s our family. It’s our home, and we want to do things that make us happy, so we don’t want to fill the entire resort, run off our feet, to make a pay cheque”*. Fosken also showed the relevance of the family bond but especially talked about the influence of his father and the passing of knowledge about how things were done from one generation to another: *“My dad is going to write a book on the history of our farms so that we can understand it because once he passes away there’s a lot of knowledge of past generations that goes away with him. Most importantly, how each generation passed on their influences to the next generation and how they dealt with transitioning the farm to the next”*. The importance of the family bond impacted on decisions that were made about the business and the way it operated. But this also worked to retain, maintain and strengthen the family bond and provide continuity over time. Discussions showed it was the family itself, what it stood for and represented, which was important. The additional data provided in Table 2 works to support the strength of this family bond and shows how it impacts on operations, the sharing of knowledge and understanding but also how it works to ensure the continuity of the family business and the family bond.

### **INSERT TABLE 2 ABOUT HERE**

Table 2 shows family bonds as significant to the business and its continuity. It also shows that family connectivity meant the business was not about the individual respondent but about the family. What especially worked to support this were the family situations respondents found themselves in. Family history and the distant past provided a foundation for shared participation. These shared experiences and practices were passed on between generations

and so became very embedded in the way the family business went about its activities, as well as what the family business actually stood for. Respondents articulated engagement and shared understanding but this was very clearly driven by family connectivity with shared experiences and practice being fundamental. Shared experiences came about through interactions with family members but especially parents, grandparents and even those family members who were deceased. These interactions were quite vividly described in a way which showed how links from the past endured. They also show the relevance of family members who have taken on a different role in the business and family members not *present* in the traditional sense.

Take for example the situation of Parte. There are four generations currently active in Parte's business. Parte's grandparents have no plans to retire from the business and Parte's son currently has the opportunity to learn from his father, his grandparents and his great grandparents simultaneously within the business. Beard's husband is considering writing a play about how his deceased parents might return to the family farm where they have their outdoor theatre company only to notice that the barns have been converted into outdoor stages. Beard's father and mother-in-law passed away several years ago, but they continue to have a significant impact on her husband's playwriting. By handing the farm down to their son, the past was linked to the present. By transforming the farm into an outdoor theatre, the Beards' present was linked to the future. By writing a play about his deceased parents returning to the family farm, the story will last forever. This is an example of how change, growth and creating something new (Habbershon, Nordqvist & Zellweger, 2008) is linked to learning about continuity across many generations. This helped develop "know how" about the business. Engagement and shared understanding was maximized due to the level of intimacy and the interpersonal relations which existed through family bonds. Furthermore,

the level of engagement and interpersonal relations does not necessarily decline as family members get older.

### **Engagement Within and Across Generations**

It appears that these shared experiences were used to connect generations. They were also used to learn for continuity about the business and the role that family played in the present and the past. This could especially be seen in the way respondents spoke about business practice and how this passed between generations. This connectivity came about through participation in aspects of the business from a very early age. This not only acted as a way to engage the next generation, but also to generate understanding about know-how and the everyday practice of the business. This seemed a critical element for respondents who referred to things like sayings they had learned and used that were passed on from generation to generation (Triport), how they had extended relationships through family (Beckett) and how connectivity and continuity was represented by other things like the maple tree that will never be cut down at Fosken's farm. The maple tree represents more than just the past to Fosken. It represents a family legacy; life's lessons, values and wishes from previous generations.

Indeed, symbols, sayings and relationships became mechanisms through which generations were linked and able to connect. However, this also represented a learning environment for the respondents. Often early engagement was important, providing a way for families to connect to the business while simultaneously learning about it. Bark, for instance, talked of how he was encouraging his daughters to get involved. Catalano demonstrated how different his situation was to his friends and what that meant for him in terms of how he learned how to find time with his father. The experience of Jaker shows how participating was fun and

living through this very clearly stayed with him. In other situations, participation was associated with understanding of the link between the level of participation in the practice of the business and material rewards. This is very clearly the case of Fosken who from an early age learned the monetary value gained through participation in the business.

Respondents described how their grandparents' nurturing of their parents impacted their parents' later nurturing of them: "*My grandfather who's passed on had a great influence on my father. A lot of the same things that I did with my father, he did with his father*" (Westwood). The influence of grandparents was also indirect and could also have a negative impact, as well as a positive one: "*I didn't have a great relationship with my grandfather because he didn't have a relationship with his father. My aunt is telling me stories and I'm thinking, well, no wonder*" (Catalano). What these respondents also show is that grandparents indirectly influenced respondents but in both positive and negative ways and how this worked seemed to pass between the generations through being situated in the practice of the family business.

What the data show is that participant's earliest memories involved the family business. In early childhood, the interactions with other family members in the business helped to shape individual ways of thinking and their learning processes. Although respondents may not have had an awareness of the family business as such, they remembered 1) the physical premises of the family business and 2) the social nature of the family bond. In some situations, respondents lived in the same property as the family business, making it difficult for them to differentiate between family and business life. In other situations, the family business acted like a daycare for infants. This participation and the intensity of the family relationship was

the context for their learning about the family business and this engagement shaped their practices.

### **The Social Situation for Learning**

Social situations created strong bonds between family members and also across generations. Living together, working together, sharing experiences, and exchanging ideas meant that family became socially and materially indebted to each other. While family could conflict with each other, at the same time family supported each other. Family bonds are a critical element across the data and time together in social situations was fundamental. What time spent together did was provide a context (a community) which shaped the learning process for respondents but also influenced the form of the family business and the nature of its continuity.

As discussed in the previous section, respondents were very engaged with the business from an early age. This engagement led to participation which took various forms. Participation led to learning for continuity. But, learning through participation related to both positive and negative events. If we take, for example, the situation of Scone for whom the most important day in the history of his business involved the potential purchase of a struggling manufacturer of ice cream products. As he and his father drove out to the country to look at this business, they discussed how they would work together using his mechanical background and his father's financial background; *"He's always sort of had his ear to the ground trying to figure out what other opportunities might be out there. He came across Canadian, and my first experience here was just following him up the road just to have a look at it, just to see if we could both see the potential in it. It was a cold winter's day about the same time of the year as we're talking right now, and it seemed kind of odd to talk about ice cream but it seems to*

*have worked out*” (Scone). While this was a positive experience that led to positive learning outcomes, other interviews revealed the importance of negative experiences that led to positive learning outcomes. The situation of Block showed this particularly well: *“The day I bought my dad out. Our business was going downhill and I bought it..... It’s no secret. My dad wasn’t going to sell it to me..... I pulled the trigger on our contract that we had and he’s the one that wrote it and he forgot how we wrote it”* (Block). After Block triggered the clause and ousted his father, he endured a distressing period over the next few years. However without the day-to-day conflict with his father, he was stimulated into action due to a change in perception of the future possibilities. In hindsight, both Block and his father realized that this was a necessary step for the business to flourish, and they have now reconciled their differences.

The data presented in our discussion and in Table 2 shows that the family is a social unit sharing common practices and understandings. Family members influence and affect other family members but as a cohesive unit the family takes on the form of a community. It is only through participating in this community that family members were able to learn about the business and how it operated. Learning for continuity through this community often occurred because respondents had seen how family bonds and forms of participation had influenced those before them. Mutual co-operation, trust and high quality relationships amongst family members provided the foundations, criteria and rules which governed the practices and ways in which these communities operated. In doing so, systems and processes were generated for how the family business should operate. These provided the boundaries for the business and the family as a community. And so, each family as a community became discrete and unique. But, these characteristics also provided the opportunity to share experiences with other family members and hence the opportunity to learn. This was certainly the experience for Mitel and

McGorman who both show how they learned from working closely with a parent. Fulton, on the other hand, described the situation with his older brother. These close family relationships have very clearly led to the development of the business. This co-participation in the day-to-day business forges and configures the learning in a family business. In the situations reported here this strengthened the business as well as the family bond.

Participation in the business with other family members, at an early age, contributed to learning for continuity through observation, daily interaction, and mutual understanding. In some situations, learning resembled a developmental relationship in which an older, more experienced and a more knowledgeable family member helped a younger, less experienced and less knowledgeable family member.

## **INTERPRETATION AND ANALYSIS**

What the findings illustrate is that participation in family business leads to learning about continuity because of the family bonds and the nature and extent of the engagement between and across the generations, in particular social situations. This study contributes to understanding learning continuity as a social process which takes place through complex patterns of participation in family business.

Our findings show that family members are engaged in a community of practice where both action and connection underpin learning because of the family business. It is through being a part of this community of practice that family members learn and understand the practice of family business. This clearly resonates with Wenger's (1998) theorizing of communities of practice and the concept of legitimate peripheral participation (Lave & Wenger, 1991). Previous studies on learning have highlighted the relevance of frequent interaction with co-

workers (Brown & Duguid, 2000; Lave & Wenger, 1991; Wenger, 1998). However, the difference between the navy quartermasters and meat cutters discussed by Lave and Wenger (1991), the insurance claims processors studied by Wenger (1998) and the Xerox customer service reps discussed by Brown and Duguid (2000) is that in the study presented here participants had known the family members with whom they interacted all their lives. Frequent interaction with family members and the willingness and ability of those engaged to nurture and develop others was common practice and the effects and implications of this were more profound than interaction with co-workers. This empirical study adds to our understanding of communities of practice and patterns and processes of legitimate peripheral participation.

### **Participation Across Generations**

In the context of family business, legitimate peripheral participation can be used to describe how young members of a family business learn, by simply being present in the family business context at a very early age. This contributes to the literature which has pointed to the limited understanding of the complex notion of participation and what forms it might take (Hamilton, 2013; Handley et al., 2006; Wenger, 1998).

While our findings seem to resonate with Hall and Nordqvist's (2008) "arenas" of communication, what we do here shows that the family business as an "arena" includes family members who do not retire, family members that have passed away and other family members not *present* in the traditional sense. This is evident through examples such as Fosken's deceased grandparents who made plans for one maple tree to stay in the middle of their main field and Beard's deceased in-laws who appear in a play script about their family farm/theatre business. Further, the level of engagement and interpersonal relations by our

respondents in their family business is so high, they are always learning about continuity. While Hall and Nordqvist (2008) differentiate between “formal” and “informal” arenas of communication, we find that family members’ learning and work practice is indivisible. In this sense, learning is not a separate activity from participating every day in the family and the business (Lave & Wenger, 1991; Wenger, 2009).

Through peripheral activities such as driving in the truck (for example, Catalano) or visiting potential opportunities (for example Scone, Bark) or hanging out in business premises (for example, Fosken), younger members become acquainted with the family business. As they become more knowledgeable, through what Brown and Duguid (1991) describe as ‘learning-in-practice’, they increase their participation in the practices of the family business. Gradually, their participation becomes more essential to the functioning of the family business as they participate both physically and socially. As they observe the practices of older family members, they learn about the broader context into which they contribute and become ‘engaged in the generative process of producing their own future’ (Lave & Wenger, 1991).

At the same time, younger participants reflect on what they learn from older family members. Combining these processes helps establish legitimacy but also provides better understanding about the broader context into which the efforts of individuals fit to allow continuity. The family business is a community of practice composed of ‘shared histories of learning’ where practice evolves (Wenger, 1998). However, our findings show how the patterns and nature of participation in the family business define the possibilities for learning for continuity. Figure 1 draws together the different elements we found from our study about the nature of the

relationship between family, business and learning for continuity. We then discuss this relationship thereafter in more detail.

## **INSERT FIGURE 1 ABOUT HERE**

### **Patterns of Participation and Legitimacy**

Our data reveal that the relationship between family and business means it could take years for younger family members to achieve legitimacy and their own identity in the family business. This is because older generations often remain in the business. As a consequence, the whole notion of “younger generations” involved in a family business may need to be reconsidered since fifty-year-old participants who have been involved for thirty years may still lack full legitimacy. Indeed, we found here that even as older family members became less active in day-to-day activities, in most situations younger family members are never really separated from the “experts” due to family bonds. Rather than being replaced through, for example, retirement, older family members take on different roles within the business and so remain active and very present. But even when older family members are no longer active in the family business, they remain important members of the community of practice despite their lack of day-to-day participation and/or changing role. Wenger (1998: 87) emphasizes the importance of shared practice enduring over time and refers to evolving ‘shared histories of learning’ as fundamental to communities of practice and their temporal continuity. What this means for the concept of legitimate peripheral participation is that family businesses are non-linear systems with different types of co-participation trajectories.

The notion of full participants being replaced is also challenged. While older family members may become more peripheral, they may never withdraw from the business. Instead, they can

become mentors for children and grand-children but often in a way which allows the next generation to focus on running the family business. Brown and Duguid (1991) made the point that to develop a better understanding about the process of learning it is important to look at it in the context of a community of practice. Our findings support this point but also show that different patterns of engagement and participation are negotiated over time, defining and shifting the conditions of legitimacy and consequent learning for continuity.

This study also brings into question the traditional view of the learning process, which typically focuses on critical stages of development which occur in a sequence (Moore & Barrett, 2002). Critical experiences cause ripples and affect how both new and old members function in the community. One such example would be the early death of a parent or grandparent. What this means is that the developmental cycle of legitimate peripheral participation proposed in situated learning theory (Lave & Wenger, 1991) is not necessarily a gradual and linear process, since defining moments do not happen gradually nor can they be planned for. Unexpected events happen and shocks occur which can impact on the process and nature of participation, and these critical events trigger learning (Cope, 2005). This understanding challenges existing theoretical assumptions that legitimacy is established by gradually increasing levels and extent of participation (Hamilton, 2013; Handley et al., 2006; Wenger, 1998) and contributes to a new understanding of the non-linear nature of the situated learning process triggered by critical episodes.

### **Learning Continuity**

This study shows that within the context of the family business, learning for continuity takes place through a social process and in situated practice. It also shows that within the context of the family business, learning for today is related to the situated past. It is a social process

whereby knowledge is co-constructed with other family members of a specific family business but in a specific family context. Learning alongside older family members provides a trajectory for future practice. As younger family members became increasingly adept, they advance in functional responsibility. Motivation often emerges with a desire to co-participate and co-contribute as a member of the family business community of practice. This shows that co-participation in the situated present is not always a linear process whereby the child is the less knowledgeable family member who learns from the parent, who is the more knowledgeable family member. Younger siblings often learn from older siblings from the same generation.

Previous work has shown that many years of sharing experiences between family members means special words, phrases, expressions, and body movements evolve that have shared meanings (Tagiuri & Davis, 1996; Tusting, 2005). Frequent informal discussions can also expedite learning (Miller & Le Breton-Miller, 2006). Another family member joined in the conversation with Swain and we found they often finished each other's sentences. Wegner et al. (1985) refer to this as "interactive cueing", i.e. a combination of individual minds and the communication among them. In another example of interactive cueing, Harvey shared an office with her husband for over 20 years. The communication between her and her husband was so frequent that she said "*she was complaining about her husband to her husband*" not realizing it was her husband. While this is beneficial for family members, it could raise issues for non-family members who are not party to the specific situations and practices through which learning takes place. Furthermore, the family bond means it is unlikely that they will be able to fully participate in the accounts, sharing of experiences and exchanging of ideas to the same extent as family members. This could affect the learning opportunities available to non-family members of the business.

This study shows that understanding of the social context in which learning takes place is critical to appreciating the continuity of family businesses. Learning occurs in a shared social context in which family members are linked to one another between and across many generations. It seems that legitimate peripheral participation goes beyond the relationship between new and old members of a family business as there are multiple forms of co-participation spanning generations. This contributes to understanding how the family and the business can endure and survive by learning for continuity.

### **Implications for Practitioners**

From this study, key implications for practitioners and educators emerge. Klandt (2004) stresses the importance of educating the consultants who might advise businesses. What this study shows is that advisors to family businesses need to think beyond current succession models to understand more fully the interplay of generations and the implications of complex patterns of participation and legitimacy in the family business. They must ask the questions: “who participates? And, how?”

For members of family business there are implications in terms of considering what participation overlapping communities of practice may contribute to the business. If learning for continuity is implicated in participation, in what other contexts might there be opportunities for family members to learn beyond the family business. Furthermore, the interconnection between the generations, and issues of legitimacy through different forms of participation should be considered and understood by family business members in order to inform the succession process.

### **Implications for Educators**

There is a need to develop learning theory (Kolb & Kolb, 2005). Linked to this are the debates about putting situated learning theories into practice, particularly in relation to classroom settings (Hamilton, 2013). The belief is that situated learning takes place in everyday settings (Fox, 1997) and so would be difficult to replicate through structured programs (Sharma, Hoy, Astrachan & Koiranen, 2006). If, as this study shows, situated learning environments help develop a family member's understanding of its past, present and future and how this fits together and influences the family business and its sustainability over time, then this is something that educators need to bear in mind when developing family business programs and courses. As educators, we are in a very fortunate position in that we can facilitate and implement effective business and management education and training that better suits the learning needs of family business members. Awareness of situated learning environments and/or scenarios could provide family members with more thoughtful education about the family business construct and familiness, opportunities to network with family business peers, curriculum relevant to local situations and specific circumstances, and a safe space to discuss sensitive and private family business issues. Patterns of participation and the issues of legitimacy and learning for continuity could also provide useful frameworks to explore family issues and lead to greater understanding.

### **Future Research**

Further investigation of the dynamics of intergenerational learning in family business would offer fruitful avenues for research. This research looks outside the family business literature, to bring new theoretical and methodological perspectives to bear, in an effort to more fully understand the complex social phenomena of family business. There is more work to be done in understanding the learning processes and their content. This current study draws on one

particular theoretical perspective from the learning literature but there are many more. Sexton et al. (1997) proposed that individuals need to learn about management succession and the problems and pitfalls of growth. Cope (2005) added that individuals need to learn about themselves, the business, the business environment and how to manage the business and relationships. The opportunities and problems family businesses face during their day-to-day activities create the potential for unlimited learning opportunities which offer fruitful avenues for future research.

## **CONCLUSION**

Our research question was *how do family business members learn for continuity?* This study shows learning for continuity is a complex social process which takes place in everyday situated practice and through patterns of co-participation between family members. Family members become part of the family business through participating in its everyday practice. Legitimate peripheral participation is an evolving form of membership that goes beyond the relations between new and old members of a family business. In the context of family business, legitimate peripheral participation is a multi-generational phenomenon with multiple forms of co-participation. This study revealed the importance of family bonds, engagement between and across generations and the social situation for learning how to ensure continuity in family business.

Social context provides the structure and meaning for shared practice (Wenger, 1998). New family members become acquainted with the business through peripheral activities and learn through observing others. As their knowledge, experience and participation increases, so does their legitimacy with new family members gradually becoming more essential to the continuity of the family business.

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Table 1: Respondents

<b>Respondent</b>	<b>Length of Interview</b>	<b>Age</b>	<b>Industry</b>	<b>Founded/Acquired</b>	<b>Total Employees</b>	<b>Family Involved</b>	<b>Generation Involved</b>
Harvey	1:43:26	60	Printing	1988	6	1 other	1 <sup>st</sup>
Bark	1:49:07	45	Real Estate	1998	16	1 other	2 <sup>nd</sup>
Beckett	1:43:56	60	Conglomerate	1964	125	2 others	2 <sup>nd</sup>
Block	1:57:29	49	Insurance	1973	50	N/A	2 <sup>nd</sup>
Catalano	2:01:45	55	Dry Cleaning	1958	7	2 others	2 <sup>nd</sup>
Fulton	1:59:15	50	Marina	1974	30	8 others	2 <sup>nd</sup>
Jaker	3:23:02	17	Motorcycle	1991	30	1 other	2 <sup>nd</sup>
McGorman	2:43:12	37	Printing	1980	18	1 other	2 <sup>nd</sup>
Scone	1:51:34	50	Manufacturing	1978	22	1 other	2 <sup>nd</sup>
Stewart	2:43:07	44	Travel Agent	1974	42	1 other	2 <sup>nd</sup>
Westwood	3:43:54	37	Resort	1991	Between 10-40 Seasonal	5 others	2 <sup>nd</sup>
Winson	1:58:01	60	Trucking	1952	54	2 others	2 <sup>nd</sup>
Parte	1:31:09	36	Construction	1975	65	7 others	3 <sup>rd</sup>
Triport	2:13:47	33	Construction	1980	250	3 others	3 <sup>rd</sup>
Mitel	1:46:26	45	Grocery	1987	6	2 others	4 <sup>th</sup>
Swain	1:53:44	31	Farm	1892	0	2 others	4 <sup>th</sup>
Beard	2:07:53	45	Theatre	1992	50	1 other	5 <sup>th</sup> (farm)
Fosken	3:02:32	22	Farm	1870	9	1 other	6 <sup>th</sup>

Table 2: Family Business as a Community of Practice: Participation, legitimacy and continuity.

Moving from data to thematic categories to theoretical dimensions				
Empirical data	Description	Thematic categorization	Thematic interpretation	Theoretical implication
Bark - "I have this property that I'm getting listed and this is a busy week so I said to the girls, come on with me. So they came out to this property. It's a vacant duplex. So they were there measuring the rooms and making notes, and they were the ones taking the pictures. My oldest daughter is thirteen, grade eight, and she says to me, I think I'll just be your sidekick, Dad, and help you out now."	Older generation encourages 'being around' the business at an early age, describes the practice of measuring and taking notes, eldest daughter proposes becoming dad's sidekick	Family bonds fostering engagement with practice in a business situation.	Legitimacy being established through participation, becoming part of the community of practice.	Joining the community of practice- Early years participation
Catalano - "My dad worked six days a week, and all the other kids in our neighbourhood, most of their dads worked at GE. So their dads were home at 5 o'clock, supper at 5 o'clock every day, and that just didn't happen in our household. He was gone at 7:30 in the morning and came home at 6 or 7 at night and worked Saturdays. If you wanted to see him, I rode in the truck with him."	Levels of participation in the business articulated as exceptional and impacting on family life. Participation by riding in the truck.	Family bonds lead to particular forms of engagement in the business participation in a social situation (riding the truck).	Family and business one and the same community of practice.	
Scone - "My first experience was just following him [father] up the road just to have a look at it just to see if we could both see the potential in it."	Father engaging son in assessing a business opportunity	Family bonds and engagement in business decision making (social situation)	Invited to participate in the community of practice	
Fosken - "I was 14 years old, and we did maple syrup every March and strawberries every June/July as well as hay, and there's 40 head of beef cattle. And once I started putting in a lot of hours into the farm, I was given a cattle or cut of the profits from the maple syrup or the strawberries. And once I realized the more effort I put in the more money I made, then that attracted me	A certain level of participation in the business 'once I started putting in a lot of hours' leads to material reward, which encourages further participation	Engaging in a social situation (the annual farming cycles)	Legitimacy to share the rewards of the business established in childhood by levels of participation in the business. Joining the community of practice linked to	

into the business.”			material well-being	
Beard - “What would it be like if they came back and saw this all going on at their home, in their barnyard? It’s set back in the ‘50s and they’re all having a family dinner and actors playing his mom and dad on stage.”	Making connections between the past and the present in terms of speculating about the forefathers being present	Family bond, social situation (family dinner)	Community of practice connected to those no longer present, acknowledging continuity with the past	Learning continuity in the community of practice
Triport - “I have little sayings and things that my grandfather might have said. For example, ‘I’d rather explain the price than apologize for the quality,’ is one of them. It’s kind of an old thing my grandfather used to say, and my dad says it, and I say it now.”	Particular business practice (the relationship between price and quality) replicated over time	Family bonds a vehicle for promulgating business practices	Engaging in community of practice, replication of business practices through family relationships	
Beckett - “I maintain various circles of friends. I keep an older circle of friends that used to be 20 years older than me. Then we became friends with our eldest son’s friends and my youngest son’s friends. We have four circles of friends. Through that experience, you can slot yourself into where you are, where they are, and where we’re all going to be, and you can pick up things that are important to them, which may mean absolutely nothing to our older friends or things that are important to us which means nothing to the younger ones.”	Building relationships across the generations and understanding what is important to different people at different times	Family bonds and social situation	Community of practice Consists of different levels and types of engagement and knowledge	
Fosken - “There’s so much history involved. My grandparents made plans that they wanted to stick through the years. Specifically one maple tree has to stay in the middle of the field. It was one of my grandfather’s wishes so it has to stay.”	Family members discussing the wishes of the previous generations and how it influences the present, learning about continuity.	Family bonds and social situations, the past influencing the future	Community of practice includes those no longer present, implications for theorising forms of participation, legitimacy and membership of communities of practice.	
Mitel - “Fortunately for me, we always kind of got along and I’ve taught him [his father] things and he’s taught me things.”	Good family relationships support mutual learning	Family bonds and social situation	Community of practice and learning	
McGorman - “My father and I, we’re responsible for doing all the work. The business planning and for the	Articulating the ways in which he and his father worked together,	Family bonds and engagement in business	Engaging in building the community of practice	

<p>bank, crunching all of the numbers and getting all of the quotes. It was a six-month project from start to finish. A lot of research, a lot of logistics. We had to strengthen the floors in the building, we had to move a wall, we had to arrange the trucking, we had to sell the other press, we had to print test the new press, we had to upgrade the electrical.”</p>	<p>specifying the practice they engaged in to achieve a project</p>	<p>practice</p>	<p>through participation in shared activities, building continuity of practice across the generations.</p>	<p>Joining the community of practice – Legitimacy and participation</p>
<p>Fulton - “There is a lot of stuff I have learned from my brother. I’m four years younger than him. So he’s been around that much longer to learn that much more in life, and even when you think you’ve got the right answer, he’ll come along and give you a different perspective of it. I run the propeller end of the business. He runs the service department end of the business. And that’s a great little marriage. We help each other out in any aspect.”</p>	<p>Age difference (4 years) and different roles in the business (‘propeller’ versus ‘service’) articulated as important for learning.</p>	<p>Family bonds, engagement in different ways and social situations</p>	<p>Clear articulation about learning fostered by family bonds. Different perspectives on the business and different ages provide opportunities to learn within the community of practice</p>	
<p>Stewart - “She [sibling] um, she ah, was working for me at the time and then felt because I was the only son, 4 years older, did I have um, you know, the reason that I was the only one that would be able to have ownership in this company and I, and I said no, that that wasn’t fair.”</p>	<p>Sibling questioning his legitimacy as the oldest son, challenging the right of primogeniture</p>	<p>Family bonds and engagement</p>	<p>Legitimacy and the type of participation (leadership or employee) questioned in terms of the community of practice</p>	
<p>Beckett - “In their early twenties, I started the process of moving them in. And that wasn’t done arbitrarily. That was done in discussion with them saying, if you’re showing an interest here, I can make a couple million dollars a year so I’ll gladly give you \$400,000 each of that and we can all have some fun.”</p>	<p>Participation discussed and organized ‘moving them in’</p>	<p>Family bonds and engagement</p>	<p>Joining the community of practice articulated in terms of participation and material reward</p>	
<p>Winson - “My son basically right now is looking after the administration and management of one of our subsidiaries. That’s a division of our main holding company. That’s his sole function.”</p>	<p>Articulating form and level of participation in the business</p>	<p>Family bonds and the form of engagement in a particular situation (the subsidiary)</p>	<p>Peripheral participation(the subsidiary) to establish legitimacy in the community of practice</p>	

Figure 1: Learning continuity through legitimate peripheral participation in family business

