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How family business practices are created, maintained, and transformed across generations from a community of practice lens

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ABSTRACT

We conceptualize the family business as a community of practice to advance an understanding of how individuals involved in family businesses collectively learn about family practices and how such practices are created, maintained, and transformed across generations. We utilize an in-depth case study of an 86-year-old family business, spanning three generations, drawing upon 50 interviews, 673 archival documents, and 25 observational instances across a 14-year period. Our findings reveal how practices are transferred across generations to family and non-family members, redefining how we view 'family business' based on shared practices.

Introduction

This paper advances our understanding of how individuals involved in family businesses collectively learn about family business practices and how such practices are created, maintained, and transformed across generations. We utilize a community of practice lens (Lave and Etienne 2002; Lave and Wenger 1991; Wenger 1998; Wenger, McDermott, and Snyder 2002) and posit the concept of a family business as a Community of Practice (CoP). CoP is a framework that foregrounds learning as socially situated in everyday practice (Lave and Wenger 2000). For family businesses, where knowledge is often tacit and embedded in the routines and activities of the business, this framework provides a valuable perspective on how learning unfolds (Rossignoli et al. 2023). The CoP lens is deemed appropriate for studying family businesses due to its focus on socially situated learning, mutual engagement, shared repertoire, and its practical utility in understanding knowledge dynamics within a community (Wenger 2000).

Participation becomes the fundamental learning process and underpins the building of a CoP. The concept has proved useful as a theory and valuable in practice (Barton and Tusting 2005). Communities of Practice are also implicated in developing a sense of identity as individuals engage in practices within and outside the business (Giovannoni, Pia Maraghini, and Riccaboni 2011; Zellweger, Eddleston, and Kellermanns 2010). In a family business, where both family and business identities are intertwined, the CoP lens helps in exploring how participation in family business practices contributes to the formation of individual and collective identities (Rossignoli et al. 2023).

CoPs consist of dimensions of the past, the present, and the future. Practices created in the past are invoked in the present, with trajectories created for the future (Konopaski, Jack, and

Hamilton 2015). As an organizational form, family firms are well regarded as embedded in situated knowledge that is transferred across generations (Clinton et al. 2021). Furthermore, forms of engagement in family businesses may emerge as shared histories, relationships, interactions, traditions, and practices (Cabrera-Suárez, Juan García-Almeida, and De Saá-Pérez 2018; Suddaby and Jaskiewicz 2020), which are all mechanisms belonging to a CoP (Wenger 1998). Therefore, for the purposes of this paper, rather than adopting a notion of community based on location or population (Li et al. 2009), our CoP perspective 'focuses on a community defined by social engagement . . . a community of practice is an aggregate of people who come together around mutual engagement in some common endeavour' (Eckert and McConnell-Ginet 1992, 95). The distinction between a community of practice (CoP) and practices within a community or networks of practice lies in the depth of shared identity, mutual engagement, and joint enterprise focused on a specific domain of knowledge or activity. CoP theory suggests a distinction between 'practice' as activity and participation as 'meaningful' activity, where meaning is developed through relationships and shared identities (Handley et al. 2006).

The emergence of a Community of Practice (CoP) is not a distinct or predefined event but rather a gradual and organic process. CoPs evolve over time as individuals with shared interests, expertise, and a common passion come together and interact. CoPs are not static, rather they are on a trajectory based on their 'shared histories of learning' (Wenger 1998, 86). CoPs are formed and change where 'the work takes place' (Brown and Duguid 1991, 41). Thus, employees are part of the CoP simply by participating and engaging in meaningful action in the family business. Taking this perspective, the entire family business entity constitutes the CoP – rather than just the family members within the business. Accordingly, we systematically apply a CoP perspective to investigate how practices become embedded in a family business, which necessitates exploring how these practices change and evolve across time and space (Wenger 1998). Therefore, our research question is: *How do family businesses act as Communities of Practice; that is, how are family business practices created, maintained, and transformed across generations?*

To address this research question, we present empirical evidence from an in-depth case study of an 86-year-old business family spanning three generations, drawing upon data collected over a 14-year period from 50 interviews with family and non-family members, 673 archival documents, and 25 observational instances. We focus on the evolution of how family business practices are created, maintained, transformed through the involvement of individuals who are both family and non-family members, thereby recognizing how the spaces of family business practices in this study are the social spaces of engagement, that is, communities of practice.

We make the following contributions: First, we build on previous literature (Konopaski, Jack, and Hamilton 2015) to develop an understanding of how practices created by the founding generation are maintained and transformed with the engagement and participation of succeeding generations. Second, we extend previous conceptualizations of the family business as a CoP (Fotea et al. 2014; Hamilton 2013; Konopaski, Jack, and Hamilton 2015) by including both family and non-family members. We demonstrate that when non-family members engage in certain practices and reproduce and transform them, they identify as part of the family. Third, we contribute to the family business literature by providing insights into multiple overlapping CoPs in the family business. We demonstrate that CoPs are not sealed off but rather overlap between family and non-family members, between generations, and among individuals from other families, with practices distributed and shared. This notion of CoPs within family businesses as overlapping systems allows for a comprehensive examination of the peripherality of non-family employees, as well as a deeper understanding of the unique role played by the family. We thus showcase how practices organize time and space with memories and expectations, connected and ordered within and beyond the family as a process.

This paper is structured as follows. First, we outline our rationale for utilizing Community of Practice lens to conceptualize how practices are transmitted and institutionalized across time and space within a multigenerational family firm. We then discuss our methodological rationale and

method and critically evaluate the empirical evidence from our detailed historical case study. Finally, the implications for theory and practice are discussed.

Theoretical framing

Family firms are a distinctive organizational form (Sharma, Chrisman, and Gersick 2012). In seeking to explain the distinctive features of family firms, Le Breton–Miller and Miller (2006) found that concentrated ownership, deep-rooted tacit knowledge, and lengthy tenures provide family firms with the resources to invest deeply in the future of the firm, with such organizational qualities being difficult for other firms to imitate. Indeed, the desire and intention to sustain the longevity of family business across generations is a distinctive characteristic and crucial mission of many family businesses (Davis 1968; Sirmon and Hitt 2003). Prior research has found that family businesses tend to have a long-term perspective rooted in intentions to pass the business onto successive generations (Chua, Chrisman, and Sharma 1999), a stewardship orientation (Eddleston and Kellermanns 2007), longer CEO tenures (Lansberg 1999; Zellweger 2007), transgenerational goals (Gimenez-Jimenez et al. 2020; Miller and Le Breton-Miller 2005), an interest in building family legacy (Zellweger et al. 2013) and longer investment horizons (Anderson and Reeb 2003; Sirmon and Hitt 2003; Zellweger 2007). However, family firms are a complex ecosystem of practices in which emotional involvement, management, and ownership overlap and can both invigorate and encumber the professionalization of practices across generations (Brumana et al. 2015).

We posit that the family business is a Community of Practice (CoP). A CoP is defined as 'a set of relations among persons, activity, and world over time and in relation with other tangential and overlapping communities of practice' (Lave and Etienne 2002, 115). This conceptualization refers to a group of individuals who share a common interest, a set of problems, or a passion and who seek to increase their knowledge and understanding of these aspects through interpersonal relationships (Lesser and Storck 2001; Wenger, McDermott, and Snyder 2002). Each CoP is a different combination of the fundamental aspects of domain, community, and practice – which evolve according to the community context (Wenger and Snyder 2000).

A CoP perspective is not unproblematic. Critics have pointed to the lack of historical and institutional understanding of the context in which CoPs thrive (or not) and how they are situated in broader social and discursive orders (Keating 2005). There are also concerns about the emphasis on participation and, therefore, the question of who is involved in the CoP or not (Li et al. 2009). The word 'community' can suggest harmony, but a CoP can be a site for perpetuating discriminatory, exploitative, and even illegal practices (Hamilton 2013). Wenger (1998) is clear that this kind of community produces its own practices, however Wenger is not asserting that a CoP is always an emancipatory force. Indeed, the understanding inherent in shared practice(s) can theoretically be a limiting force, locally ingrained, and an obstacle to learning.

Research on communities of practice has traditionally focused on the development of practice(s) and the emergence of a shared identity around a set of practices that represent a collective intention within a community context as a result of relationships and interactions among participants (Lave and Wenger 1991; Vershinina, Phillips, and McAdam 2022). A core aspect of a CoP is the ongoing engagement in a common endeavour by a collection of people who develop their own practices, routines, rituals, traditions, artefacts, symbols, conventions, stories, and histories (Eckert 2006). Community membership provides a focus or perspective, which manifests as 'a tendency to form certain interpretations, engage in certain actions, make certain choices and value certain experiences' (Wenger 1998, 152–153).

Within this view of CoP, we are specifically interested in the practices facilitating information and resource-sharing relationships between family members and non-family members (Murdoch 2000). Indeed, what makes the use of the CoP perspective relevant within a family business setting, is how CoPs may represent communities of practitioners, whereby placing emphasis on 'practice' rather than 'community', in turn also redefining community as 'an effect, a performance, realized through

the discursive practices of its members' (Gherardi 2006, 110). Given that a CoP is an ideal forum for sharing practices within a family business (Eckert 2006), it is important to underscore where and *when* practices are enacted. Since practices extend themselves by continuously renewing the conditions that determine them (Giddens 1985), this results in the evolving time and expanding space of practices. Practices are also observable and are 'understandable to the agent or the agents who carry it out, it is likewise understandable to potential observers' (Reckwitz 2002, 250).

The term 'practice' encompasses the meaning-making, identity-forming, and order-producing actions (Chia and Holt 2006; Nicolini 2009) enacted by multiple practitioners situated in specific historical conditions (Thompson, Verduijn, and Gartner 2020, 247). A practice is the 'temporally unfolding and spatially dispersed nexus of doings and sayings' (Schatzki 1996, 89) that are (a) relational, (b) embodied, (c) mediated, and (d) organized around shared practical understanding (Teague et al. 2021). Practices are inherently relational (Nicolini 2012). Practices are actions (doings and sayings) that are enacted by multiple practitioners, and they are organized and connected through their unfolding sequence (Champenois, Lefebvre, and Ronteau 2020).

Schatzki (2001) summarizes these doings and sayings within the umbrella term of the 'field of practices', comprising knowledge, meaning, human activity, science, power, language, social institutions, and historical transformation. Practices are thus repeated patterns of routinized action to the point that the similarities in performance allow for the recognition of a common practice (Champenois and Jack 2022). Practices organize time and space in that they have organizing components of aggregation and coordination, which are fundamental to social life (Schatzki 2020). The practice tradition challenges assumptions of ontological individualism (Thompson, Verduijn, and Gartner 2020) by invoking social ontologies and studies grounded in social practice theory literature (Teague et al. 2021). Social practice theories, including Community of Practice (CoP), underscore the 'importance of activity, performance, and work in the creation and perpetuation of all aspects of social life' (Nicolini 2012, 3).

While Nicolini (2012) suggests that the term 'community of practice' is redundant in that all practices inherently involve others, he does recognize that the idea of 'community of practice' has value and suggests that a 'community of practice' perspective can be a lens for seeing practices:

> A different way of expressing the same concept is to emphasize that communities of practice are, in fact, communities of practitioners constantly busy positioning themselves within the ongoing practice. Practitioners, as in the vignette discussed at the end of the chapter, do not need to share the same occupational background, the same interests, or some kind of feeling of unisonance in order to be part of the community of practice. It is the practice itself that provides the common background: as I described above, it is practice which performs community and not the other way around. In this sense, the practice which brings practitioners together also divides them, as all practices have, by definition, a plurality of positions and voices. As much as sharing some inexistent substance, knowing how to be a good practitioner implies knowing how to interact with different 'knowings' and the power position that go with them. This requires, in turn, an appreciation of the different perspectives based, for example, on the understanding of the practical concerns that guide other people's conduct. It also requires the establishment of discursive and material practices of mutual positioning and alignment. This result is that the practice consistently looks much more like a dissonant pattern of voices in search of a precarious point of alignment than a canon sung in unison by all those involved. (Nicolini 2012, 94)

It is from this understanding of 'community of practice' that we re-emphasize that a family business can be studied as practices that constitute a family business. Therefore, our research question is: *How do family businesses act as Communities of Practice; that is, how are family business practices created, maintained, and transformed across generations?* From this perspective, our interest is in advancing understanding of how individuals involved in family businesses collectively learn about family business practices.

Methodology

In framing our study, we view cross-generational business practices within a family business as a socially embedded process. To capture this contextually complex process and, in so doing, answer

our underpinning research question, we utilized a richly detailed, in-depth case study. As we were interested in exploring how family business practices were created, maintained, and transformed across generations, a longitudinal inquiry was necessitated (Anteby and Molnar 2012; Argote and Miron-Spektor 2011) that aligns with our chosen research design. For the reasons outlined above, our research design is consistent with our research question, which seeks to explore how family business practices are created, maintained, and transformed across generations.

Case selection

Our sampling approach was theoretical and purposive (Pratt 2009) in having the characteristics that aligned with our inquiry (McAdam et al. 2023). Our evidence of practices draws upon insights from a third-generation family business located in Ireland known as Dunheda. We include insights from the top management team (including non-family), non-executive family members, family office members, and stakeholders external to the business. For the purposes of our study, we decided on this family firm for our inquiry based on four key rationales. First, to ensure that firm management was financially motivated to engage in a range of practices within the family business, we chose a family firm that has of significant size to represent the family's principal income (Jaskiewicz, Combs, and Rau 2015; McAdam et al. 2023). Second, we chose a family firm with aspirations to pass the business to next-generation members (Nordqvist and Zellweger 2010). Third, we selected a family business with the incumbent generation of succession age (i.e. greater than 55 years of age) (Jaskiewicz, Combs, and Rau 2015). In addition, we selected a family firm consisting of a varied range of family and non-family members to establish that a heterogeneous community of practices existed within the business (Lave and Wenger 1991). A historical overview of Dunheda is provided below and diagrammatically in Table 1.

Data collection

The formulation of our case study database (DeMassis and Kotlar 2014) was based on three data collection techniques – interviews (both one-on-one and focus group), participant observations, and archival data spanning 14 years of Dunheda's history. Over a 14-year period, members of the research team were provided access to the family business (e.g. board meetings, family council meetings, ownership conversations, family dinners, and corporate presentations). As a result, the team had access to key informants to the family business including family and non-family executives.

Table 1. Description of Dunheda.

Family Name	Fletcher
Business Name	Dunheda
Core Industries	Renewable energy; waste management; water; infrastructure
No. of Employees	3300[a]
No. of Operating Countries	5
Turnover (€)	672 million
Year Founded	1978[b]
No. of Generations	3
Family CEO	No
Family Percent Ownership	96%
No. of Family Members on the Board of Directors	2
No. of Family Members in the Ownership Group	6

[a]Employee numbers at the time of data collection.
[b]While Dunheda was founded in 1978, the Fletcher family's association with the infrastructure industry dates to 1932. The company continued its international growth through the acquisition of quarries (mainly family owned) starting in Northeastern America.

Interview data and sources

Interviews aimed at capturing the interviewees' perspectives on events and practices (Hamilton, Discua Cruz, and Jack 2017; Radu-Lefebvre et al. 2022) were conducted with family and non-family members at five data collection points during a 14-year period (2007–2017), which totalled 27 interviews that varied in length between 90 and 120 minutes. Sample questions relating to the firm's history and practices included *'What are particular sources of pride for your family business?'; 'In what ways do your family business values affect everyday activities'; 'What is the impact of owner-founder styles and values on succeeding generations'; 'How regularly do you discuss your collective vision and your common goals?' 'Does your family governance provide a vehicle for articulating your vision and values?'* Follow-up interviews (*n* = 23) were utilized to clarify, corroborate, and confirm the interview findings. Furthermore, we conducted a focus group in accordance with the methodological procedures outlined by Krueger Richard (1988) with six members of the family, who were asked to name and describe the family business's key events. As a form of method triangulation, the focus group involved corroborating interviewees' retelling of incidents both against those of fellow interviewees and against observations and secondary sources, thus validating the events' significance.

Observations

During the research period, we engaged in participant observation in diverse professional settings such as family council meetings, AGMs, family dinners, family away-days, conferences, and plant tours (*n* = 25). Participant observation method allowed the research team to develop an intimate familiarity with the site of the practices and with the practitioners (Thompson, Verduijn, and Gartner 2020). For each observation, in addition to meticulous detailing of the practice itself, the researchers diligently noted the time and location, the participants present, and the type of event (or non-event) (Yin 2013).

Archival records

We collected several thousand pages of archives on Dunheda consisting of public records supplemented by other information sources provided by the family. These archival records assisted us in identifying the firm's practices. Moreover, these records (i.e. 673 sources) were typically produced in 'real-time' and aided triangulation (Yin 2013). A comprehensive review of our archival sources is presented in Table 2. A full review of all primary data sources is presented in Table 3.

Table 2. Archival Data.

Archival Sources	No. of documents	1970–1980	1981–1990	1991–2000	2001–2010	2011–2021
Media Articles	93	12	6	10	37	28
Company Reports	29	2	4	3	12	8
Company Filings	501	-	-	-	117	384
National Companies Register[c]	24	-	-	6	8	10
Planning Applications	8	3	2	1	2	-
Corporate Presentations	5	-	-	-	-	5
State Contract Applications	4	-	2	2	-	-
Court Proceeding Documents	2	-	-	2	-	-
Television Documentaries	1	-	1	-	-	-
Company Profiles	1	-	-	-	-	1
Company Web Page	1	-	-	-	-	1
Press Releases	4	-	-	-	-	4
Total	**673**	**17**	**15**	**24**	**176**	**441**

[c]Denotes current and previous directorships registered with the national companies register, as accessed through Bureau van Dijk's Fame database.

Table 3. Interview and Participant Observation Data (2007–2021).

Interviews	Family generation/yrs. in firm	Shareholder	No. of core interviews	Length (Min per interview)	Follow-up interviews	Focus group interview	Year of Interview					
							'07	'08	'10	'12	'17	'21
Executive Chairman	2 G/>40	Yes	7	120	7	Yes	2	1	1	1	1	1
CEO	No/<5	No	4	80	2	No	1	1	1	-	1	-
Business Development Manager	3 G/>15	Yes	6	90	6	Yes	2	1	1	1	1	-
Financial Director	No/<20	No	4	90	3	No	1	1	-	1	-	1
Non-Executive Director	3 G/<10	Yes	2	80	1	Yes	1	-	1	-	1	-
Financial Advisor	No/<10	No	2	85	2	No	1	-	1	1	-	-
Business Consultant	No/<5	No	1	85	2	No	1	1	-	-	-	-
Family Council Member	3 G/<10	No	1	90	0	Yes (3)	-	1	-	-	-	-
Total	**N/A**	**N/A**	**27**	**690**	**23**	**6**						

Observations	No. of observations	2007	2008	2009	2010	2011	2012	2017	2020	2021
Family Council Meeting	2	-	x	-	x	-	-	-	-	-
Annual General Meeting	4	x	x	x	-	x	-	-	-	-
Family Dinner	3	x	x	-	-	-	x	-	-	-
Family Away Day	2	x	-	x	-	-	-	-	-	-
Plant Tours	3	x	-	x	-	-	x	-	-	-
Conference	7	x	x	x	x	-	x	x	x	-
Court Case Hearing	2	xx	-	-	-	-	-	-	-	-
Corporate Presentation	2	-	-	-	-	1	-	-	x	x
Total	**25**	**7**	**4**	**4**	**2**	**1**	**3**	**1**	**2**	**1**

Data analysis

The longitudinal interviews were transcribed verbatim, and each source was iteratively analysed through NVivo. Following Braun and Clarke's (2006) steps to thematic analysis, our data analysis procedure of 513 pages of transcripts from approximately 38 hours of tape recordings is now detailed. First, we began by familiarizing ourselves with the data. In line with best practice, the researchers immersed themselves by reading the entire data set while searching for meaning and patterns prior to formal coding (Braun and Clarke 2006). During this process, the codes from all individual participants were scrutinized, and a list of generic codes grounded in the participants' language was formed. In the second data analysis stage, we gathered evidence of the practices from textual items (for example, newspaper footage, interview quotations, and government reports). The final list of practices totalled 172 textual items. The coding of data was undertaken by two research team members who acted as independent raters who met regularly to review their analysis and resolve any discrepancies in data coding. A third member of the research team (full professor) served as a referee, making final decisions if divergent opinions between team members could not be resolved (McAdam et al. 2023). During this process, the research team met at regular intervals to discuss the inclusion and relevance of each practice. This resulted in an inter-rater agreement of 0.93, which is above the proposed threshold of 0.70 (Cohen 1960). We endeavoured to guarantee the trustworthiness of our data as we regularly sought to clarify and validate our analysis through our traceable evidence chain and follow-up interviews with participants (Morse 1991). The use of triangulation sought to mitigate any potential issues of construct validity (Gibbert, Ruigrok, and Wicki 2008). Finally, following Gioia, Corley and Hamilton (2013) the theoretical relationships between the practices were considered, and these first-order codes were categorized into second-order themes and aggregated into three aggregate theoretical dimensions. To ensure the reliability of our analysis, the data was cross-referenced against the characteristics of participants (Elo and Kyngäs 2008) while also triangulating the various data sources (Gibbert, Ruigrok, and Wicki 2008). The final data structure is presented in Table 4. In the preceding sections, we present our findings wherein we intersperse power quotes (Pratt 2009, reflecting the most compelling and accurate data extracts (McAdam et al. 2023).

Findings

Given that 'practice' is a primary generative phenomenon of CoPs and holds responsibility for the futures, pasts, and spatialities of their participants, we explore how these practices evolved and expanded across time and space dimensions in Dunheda. Accordingly, we present the findings in a temporal sequence: (1) how family business practices are created, (2) how family business practices are maintained, and (3) how family business practices transform over time.

How practices are created

Our empirical data allowed us to identify four practices which were brought to bear within and across generations of the business: (1) *long-term orientation*, (2) *stakeholder value congruence*, (3) *entrepreneurial venturing* and (4) *resilience despite failure*. We identify mechanisms that show how practices are created including *observation and benchmarking*, *network presence*, and *early experiences* (second-order codes, see Table 4). To complement the description of these findings, additional illustrative quotes of the nature of these practices and how they came into being are presented in Table 5.

A ubiquitous feature of many family firms is seeing value in a temporal outlook, often pursuing a *long-term orientation* (Lumpkin, Keith, and Todd 2010), a practice that, for Dunheda, was created in the establishment of long-term strategic partnerships. Based on his early experience as founder of the world's third largest construction supply company, MRP plc, Bill Fletcher regularly travelled to

Table 4. Data structure.

Evidence	First-Order Codes	Second-Order Codes	Aggregate Theoretical Dimensions
abC	Actively undertaking information gathering visits outside of the host country	Observation and benchmarking	Creation of Practices
abc	Seeing value in challenging the 'status quo' through international benchmarking		
Abc	Attending trade shows, conferences, and developmental workshops	Network presence	
ac	Developing an international network of industry peers		
abc	Mapping stakeholder activities (e.g. political connections)		
abc	Referring to the influence of early life experiences	Early experiences	
ac	Recalling the lasting effect of traumatic early childhood events		
ac	Referencing the pivotal role of early childhood influencers		
Ab	Exchanging ideas, approaches and fresh perspectives, family and non-family		
Ab	Predecessors providing guidance on dealing with personal and business issues		
a	Actively resourcing intergenerational teamwork, family and non-family	Intergenerational teams	Maintenance of Practices
aB	Family business owners telling the family history in an emotional way	Storytelling	
abc	Knowing how the family business survived past perilous times/calamities		
Ab	Drawing on examples of past legacy to inform strategic decision-making		
B	Family portraits positioned throughout the organization	Artifacts and shared history	
abC	Formal documentation of a shared family history		
abC	Next-generation members creating family history books		
AB	Referring to the role of non-family in formalizing structures	Role of non-family	
AB	Family governance enabling healthy familial relationships		
Ab	Non family nurturing next-generation members		
ab	Lessons learned from expanding CoP membership (non-family)	Overlapping CoPs	Transformation of Practices
A	Knowledge exchange with an overlapping community		
Ab	Feedback and feed-forward practices between multiple family CoPs		

A = evidence from 6+ interviewees; a = evidence from 4+ interviewees; B = evidence from 4+ observations; b = evidence from 2+ observations; C = evidence from 4+ archival types; c = evidence from 2+ archival types.

Table 5. Creation of practice – illustrative quotes.

Observation and benchmarking
- 'Best value creating model for an organization is a long-term strategic shareholder preferably family married with public shareholders, you get a mixture of the family influence with the vision and the long-term strategic thinking with the dividends of the market' (Interview, Chair, 2nd generation)
- 'Much of [quarry name] was designed on the road. We researched years of quarry and concrete magazines and then organized a tour of the most advanced facilities right across the US, with helpful introductions by equipment suppliers like Nordberg, Allis Chalmers, Caterpillar, Besser, etc. Designs were deliberated late into the night in small motel rooms and bars, resisting other temptations, as we traipsed the length and breadth of America' (Family business book)

Network presence
- [emphasis on a network of partners] 'The importance of values and sharing our vision is key. Our long-term commitment to deals (i.e. public – private partnerships) helps with prospective clients' . . . ability to make judgements on whether the business we [are] investing in is a viable business. The people in the business, are they the type of people we believe in, do they share our set of values' (Interview, Chair, 2nd generation)
- (letter exchange between an elderly Bill Fletcher and the now-CEO of CSH Plc): 'All a legacy of your bold initiatives of 30–40 years ago. Much to be proud of, indeed. Thanks again, Bill, for all you have done for [company name] and for a young engineer that worked with and learned so much from you 30 years ago'.
- 'This partnership approach, is crucial . . . . it is partnering with entrepreneurs who hold common values to the Fletcher's' (Family archives)
- 'Martin travels with the management team to meet with the owners of firms the group are merging with or acquiring, very often there is a mutual agreement on the values of the firms. Martin has been invaluable in developing relationships in North America' (Interview with a former CEO, non-family)

Early family experiences
- 'Mother ran the shop, there was no money in running a little grocer's shop . . . turning the shop into a confectioner's, with sweets and tobacco' (Family archive)
- 'Hard graft was the order of the day back in St. James's Place in the 1930s. Little were they to know, but the backbreaking work they engaged in in that yard was the acorn that would grow to become one of the biggest building materials companies in the world' (Family business book)
- 'Many deals went wrong simply because we wanted different things, and this slowly came out as the contract progressed' (Family archive)
- (letter from Bill Fletcher before entering a trial with his brother-in-law): 'What I look to in times of trial is a depth of inner strength that I can call on. I think it originated in my mother. Fortunately, I can call on mental reserves. I don't need alcohol or pills. I think it also has its origins in the fact that I was grubbing for pennies when I was young. When you start from such a low base, it must condition you afterwards. As you know, we've had rough times financially and so I have had to accept the worst that can happen and learn to live with it' (Family business book)
- (on the familial dispute between Bill and his brother-in-law): 'One of the Judges who heard the long and detailed arguments advanced by [name of brother-in-law] described him as "a man obsessed" and "an eccentric and difficult person", who heeded neither advice nor caution in his bid to claim what he believed was rightfully his and what had been taken from him in a giant conspiracy that nobody but he fully understood' (Family archive)
- '[The venture with his brother-in-law] was a mistake. I was tempted by the piratical aspect and the romance of it. There were a few times when I could have got out, but I didn't have the final say. All the assets I had went into it' (Personal letters in 1986)

Europe and the USA observing and benchmarking technologies and contrasting them with mining technologies in Ireland. As Martin Fletcher, Bill's son, comments,

> He would regularly travel to Germany and the United States to benchmark current quarrying, mining, and road building techniques against the leading industrialised nations. He would then repatriate this knowledge back to his business in Ireland. Bill's leadership skills and drive were two of his most stringent traits.

It was during his visits to mainland Europe that Bill witnessed firsthand how public bodies and private enterprise could work collectively to develop large capital infrastructure during times of economic hardship. Irish Government records (1984) revealed that Bill Fletcher entered a 30-year bridge tolling rights contract with the Irish Government in the form of a public – private partnership (PPP). A feature section in a national newspaper (1985) notes how 'the creation of the PPP model heralded an opportunity for large scale infrastructure development at a time of state fiscal conservatism'. The formation of the PPP framework came at a time when Ireland's gross domestic product (GDP) was the lowest in Europe and investment in State infrastructure was poor; indeed, the country was often referred to as the 'sick man of Europe' (national newspaper 1982). The formation of long-term partnerships had mutual benefits for public bodies and private enterprise: the State secured access to new infrastructure, while private enterprise obtained exclusive ownership rights

(including tolling rights) for a specified period. On the partnerships with the Irish Government, the Chairman Martin Fletcher (2G) commented, 'we [my father and I] had the security of a state partnership; while risky at the time; we knew we would be paid'. The creation of this practice, then, came about through one of the founder's early experiences learning about the long-term value of PPPs *in* Europe and then applying this knowledge to the development of such an effort in Ireland.

A second practice that was created underpinned Dunheda's international trade strategy of *stakeholder value congruence*. Our archival data (i.e. government documents, company reports, family diaries) suggest how the founder – and later, his son – through their network presence, actively pursued strategic partners who possessed outlooks, values and principles similar to his own. Based on his early experience, Bill Fletcher had witnessed *'so many deals go horribly wrong'* (company archives 1992). Earlier in his career, Bill had shown an interest in a number of side-line activities (e.g. plant machinery), which, during the course of our interviews, we discovered had been less than successful. His advice to his children (from family archives) was to *'put all your eggs into the one basket and mind the basket'*. He was adamant about the importance of alignment of values in prospective (international) partners, asking, *'will they share what we value, loss of values can mean a loss of so much'* (national newspaper 1994). During the earlier rounds of interviews, the Chairman Martin Fletcher commented,

> when partners hear about **o**r legacy and our values, and fundamentally what is important for us, it is often the glue that binds us together.

Our findings suggest that in this CoP, 'sayings' and 'doings', such as the need for an alignment of values, emerged during the early experiences of the business and have persisted across time (Schatzki 1996). To illustrate, the Chairman Martin Fletcher (2G) commented, *'my father had clear thoughts on who we are, what we do and more importantly what we will not do in business; this has always stuck with me'*.

A third practice that emerged from our data was *entrepreneurial venturing*, a practice that formed a high tolerance for risk in the family. As was observed during an industry presentation delivered by a second-generation family member and evidenced from multiple family archives (e.g. family business books, newspaper footage, personal letters), Bill Fletcher's principal motivation to pursue entrepreneurial initiatives was driven out of necessity and largely influenced by early experiences, notably by the actions of his mother. Following the sudden passing of her husband to illness, Bill's mother was forced to purchase a small grocer shop to fend for her young family. On the passing of his father, Bill commented (family archive):

> We were thrown into the world to make a living. I was about 13 or 14 . . . . Mother ran the shop and there was no money in running a little grocer's shop. I don't know what prompted her to start offering home-made scones and bread, but she was a great cook. There was profit in that alright. She turned the shop into a confectioner's, with sweets and tobacco on the side.

At a time when businesses would have been traditionally run by men (business publication 1925), Mrs. Fletcher was not deterred by social norms. She was a hard-working woman who instilled a strong work ethic in her offspring. A neighbour who ran a barber shop adjacent to the family grocery commented (family archive):

> She was a very nice lady, a first-class baker and the shop was very well supported. My aunt said when it first opened that it would never last as all that was apparent at first was a few jars of sweets in the window, but the cakes that she started to bake became a big seller and it did a good trade. Mrs. Fletcher had a strong work ethos and the children all worked hard. Bill would carry a tray of sweets into the cinema every evening and sell them.

A fourth practice that emerged from our data was the role of *resilience despite failure.* In our case, we discovered that Bill, engaging with his significant *network presence*, made a high-risk investment in a mineral mine with his brother-in-law and former business partner (national newspaper 1986; family archives; personal letters). A bitter personal dispute emerged over financial commitments and

contract expectations, resulting in a lengthy legal battle. The process of the 11-year legal dispute (the longest civil dispute in Ireland's history) had a negative effect on relationships in the family. Reflecting on the legal dispute and the early experiences, Bill remarked *'I have made some bad decisions in my dealings with people, but this has really taught me the importance of relationships, trust, and respect . . . . But yes, I have learned the hard way'* (national newspaper 1986). Learning the hard way for Bill revolved around bitter legal disputes, where all the *'family's dirty laundry was on show to the entire country'* (national newspaper 1992). This aspect of a community of practice emphasizes the self-consciousness of the community regarding the repertoire that is being developed and its impact on practice (Wenger 1998). Martin Fletcher commented on his early experience in this business which included difficult childhood memories (family archive):

> Growing up, I was never aware of the business side of things until the age of nine. I came home from [school] one afternoon and, as I got close to the house, I could see a big truck and people loading furniture. Dad was shouting. I realised that they were taking the furniture out of our house. That always stuck with me. It has set some of my risk expectations in life. Some 20 years later, I mentioned it to Dad. He was surprised that I remembered. I am very conscious of how debt can make you vulnerable.

These four practices that were identified stem from the senior founder's previous experiences and were created through: (1) observation and benchmarking, (2) network presence, and (3) early personal experiences. This finding mirrors previous scholarship and indicates the primary role that founders play in creating initial organizational forms (Johnson 2007; Perkmann and Spicer 2014), strategic guideposts (Sinha et al. 2020), 'blueprints' (Baron, Hannan, and Diane Burton 1999) or 'simple rules' (Bingham, Eisenhardt, and Furr 2007). In conceiving of the family business as a CoP, these findings illuminate the emergence and creation of practices established by the founding generation and in which the succeeding generations engage and participate (Hamilton 2013; Konopaski, Jack, and Hamilton 2015).

How practices are maintained

Our findings demonstrate a generative process, which implies an evolving and expanding of practices (Fotea et al. 2014; Schatzki 2020). In seeking to understand how practices are maintained, we explore processes of legitimate peripheral participation, focusing on how members of one community of practice are joined by others from a subsequent generation (Hamilton 2013). Most notably, we discover an exchange of practices between and across generations of the family. Such practices show how multiple generations can share their knowledge and understanding through interpersonal relationships (Lesser and Storck 2001; Wenger, McDermott, and Snyder 2002). To complement the description of these findings, additional illustrative quotes of the nature of these practices and how they came into being are presented in Table 6. Close interpersonal relationships between two generations (e.g. father and son) are evidenced in our case in creating a series of long-term governmental partnerships. Martin and Bill verbalized the initial insight – '*we had the security of a state partnership, while risky at the time; we knew we would be paid*' (Chairman 2G). On the *inter-generational* working relationship with his father, Martin commented, *'We bounced ideas off each other all day, every day. It was always about looking for long-term opportunities with the right people'*.

While prior research has focused on intergenerational knowledge exchange in the form of preceding generations (for example, between father and son), our research suggests that through mutual engagement over time, CoPs can span generations. In the case of the Fletcher family, close familial ties existed between the founder and his eldest grandson, Liam. For the founder, community and social giving were fundamental personal values, evident in his leadership of a charity for the homeless. Through close *inter-generational team* bonding, Bill and Liam pursued a series of non-profit ventures aimed at easing homelessness in the community. Liam later progressed to lead multiple non-profit initiatives - *'from a very young age he [the founder] became our hero, we looked up*

Table 6. Maintenance of Practices – Illustrative Quotes.

Intergenerational teams
- 'My Dad went to Papa Fletcher almost every day for a chat after work, sometimes about business and sometimes not. I would often go with him' (Family business archive)
- 'I've worked my way up in the business [emphasized on the influence of parents and grandparents), from cleaning debris from highways to operational issues in waste management, to business development manager, to now working in corporate finance for the group. . .all the time improving my skills in the business' (Interview, Business Development Manager, third-generation member)
- 'My two granddads had similar values. There was an appreciation for front-line staff and an understanding that that is where the business is grounded. And everything happens behind that and is facilitated by that' (Interview, Director, third-generation member)

Storytelling
- 'Though retired and in his 68th year, Bill Fletcher is impeccably dressed in a three-piece grey tailored suit with conservative blue shirt and matching tie and answering the audio-visually-secured door to his period residence at 9.30 am. When the girl fails to clock in, he serves strong tea for two with biscuits on a silver tray and a knitted cosy on the teapot. The grounds, kept by a full-time gardener, could be part of the Botanic Gardens. For one who has ruled 8,000 quarry men, he is disarmingly quiet, human, and mannered, almost monastic in manner and tone' (Family business library)
- 'The story of the modern Fletcher family begins with a figure who, for many, was considered a heroic and inspiring individual who brought great honour to the family name' (Non-Family Advisor)
- 'It is a really important thread that is felt deeply by the people who work in Dunheda. The engineering and operations people are very vocal about that. Their pastimes often involve nature; rock-climbing, hang-gliding and sailing, for example. I couldn't see us getting into arms manufacturing. That's just not in our DNA' (Interview, Business Development Manager, third-generation member)
- 'My father made an interesting point. A lot of builders would be meeting at the races and consorting with political types. The Fletchers didn't. These builders always thought that they had one over on everyone else. My father observed that they had not heard Machiavelli's advice, "Put not your trust in Princes". They had a false confidence which never meant anything at the end of the day' (Family history book)

  Artifacts and shared history
- 'The primary objective of the book is to describe the individual characters in such a way as to give insight into their personalities and feelings, so that the reader might get to know them as individuals – to be judged by their nature and personality, and not just on the basis of their business successes or failures' (Family business archive)
- 'It will be interesting to see how things continue in the future as the family grows and we have a wider group of stakeholders. I would like to think that our children would have the emotional engagement with what has been created and why the structures have been put in place, but it will be interesting to see how it evolves over time. I think the physical structure of the Family Office and the people who run it with us will help in that regard' (Family business archive)
- 'I cannot but think what he would have done, the portrait always makes me feel like he is present, it is special' (Interview, Chair, second-generation)
- 'Documenting our heritage, as politicians and representatives of the people, has been invaluable' (Irish governmental archival documents)

to him, I spent so much time just learning from him . . . . he instilled in me the importance of working hard and pursuing opportunity but seeking to foster my skills for the good of the community'.

Another finding demonstrates that CoPs are not sealed but rather overlapping, with spatially dispersed practices distributed across CoPs, not confined to family members. As Martin notes, *'Non-family executives become more family than the family themselves'*. The cross-pollination of CoPs between family and non-family members can be seen in Dunheda's pursuit of stakeholder value congruence and its importance in its international expansion strategy. According to a non-family non-executive director, *'the values of this business are clear, and I believe we live them. The alignment of our [family] values with other stakeholders is often a deal breaker'* (Non-Executive Director 1, 3G). The non-family CEO further commented, *'We are dealing with people who possibly share our own family values. They do not like dealing with a faceless company that they cannot relate to, and particularly in the US, as most of the big companies we partner with started out as family companies'*.

Due to the different types of data collected, archival data (e.g. radio footage, newspaper reporting, governmental archives), interview data (e.g. interviews with multiple generations of family and non-family members), and observation data (e.g. family council meeting, family dinners) mechanisms of the evolution of practices emerged including forming intergenerational teams, storytelling, and the utilization of artefacts and shared history.

To illustrate, we found evidence of shared practice with family and non-family facilitating the persistence of the CoP of entrepreneurial risk-taking. In line with the entrepreneurial actions pursued by previous generations, Martin's first son, Liam, established a telecommunications company. Martin's second son, Jim, established a nationwide restaurant chain. For both Liam and Jim, inter-generational teams served an important function – *'I learned about business from my grandfather who taught me about looking for opportunities and dealing with people, my father taught me about the unique features of our business and then our executives taught me about formalization and business governance'* (Liam 3G). The family actively encouraged inter-generational work patterns through the formation of family teams, *'Dad, was adamant about passing on this knowledge and industry insights during my earlier years. He took me along to all meetings. Even today, we discuss how we can learn from each other'*. Non-family executives played a pivotal role in supporting inter-generational teams. During family office meetings, we observed non-family executives discussing the family's values and how to ensure inter-generational teams were grounded in such values, *'we are a values-driven business which is critical to our success'* (observation, non-family executive). A non-family executive commented, '*Being with the family firm so long, their values are my values, as strange as that may sound'* (non-family executive).

Storytelling and role modelling were also instrumental in ensuring the evolution of practices. Our interview narratives reveal that all of the children – who now represent the new generation of management – engaged in shared activities in the community of practice over a long period which has subsequently affected its practices: *'All of the children at this stage are up to speed, whereas if you go back 8 years ago for argument's sake, they were 22-year-olds with sort of no experience in business. [. . .] They now know how to ask questions; they also now know it's their money at risk'* (non-family Financial Advisor). Paradoxically, one of the key aspects that the children have learned through storytelling is the importance of relationship management:

> we've put so much work into our structures and family governance, I hope it will serve my children well long into the future. They know realise business is just not about the deal but about the relationships, and they've lived that experience. (Chairman, observation during training programme, 2G)

We saw the spatial expansion of practices to non-family executives, of storytelling and legacy building in the attendance of non-family executives at family events (e.g. birthdays, weddings, family council meetings) and role mentoring through their involvement with inter-generational teams. One such practice that was passed to non-family executives was the importance of stakeholder value congruence and the use of the family reputation for corporate gain. Leveraging the family reputation was considered a family practice of securing both family and company proponents for the community of practice. This practice was adopted by Dunheda management, who utilized the family affiliation in partnership pitches: *'The family element is a very important part of our package'* (non-family CEO). During an annual general meeting of the firm, we observed the non-family CEO discussing the importance of the family's legacy and its entrepreneurial appetite, an insight he learned through storytelling.

The Fletcher family actively sought to formalize their shared family history through the creation of a series of books, including the 200-page Building a Legacy. Writing in this book, a second-generation family member commented:

> In some respects, the book is 30 years or so too late in the making, in that some of the principal characters – indeed, the most important characters – have passed on, and so we are deprived of their direct and personal memories. Fortunately, however, there are sufficient third-party individuals who have provided us with contemporaneous interviews and writings as to make the contribution of those who have passed on seem current and in the present.

For members of the third generation, books such as Building a Legacy (and a second book, titled The Quarrymen 1949–1991) serve a pivotal role in embedding the family legacy over time. Jim Fletcher explains the importance of documenting their family history,

> what an incredible resource for us, it shows the hard and humbling times my grandfather came from and what he has created, I can't wait to pass it on to my children and who knows maybe even their children

Table 7. Transformation of practices – illustrative quotes.

Engaging overlapping communities
- It taught me a lot, on the highs and lows of family business, which for our business has been invaluable (Presentation, Chair, 2G)
- [on learning between families] 'You learn a lot more from those hard times than if you had an easy path. It toughens you up' (Interview, Business Development Manager, 3G)
- [learning about building relations] 'Lawyers and accountants are exiting strategy stuff and their principal objective is how to maximize value from the exit, it is not cohesiveness to relationship development' [emphasis on psychologists working on emotional issues] (Interview, Chair, 2G).
- 'Yes, I believe it is crucial, we started this after the dispute in the [name] family, Dad thought I am not going through this again, you can see the difference even in working in families, we started the family consulting earlier and you can see the difference in how the go about doing business' (Interview, Business Development Manager, 3G)
- [on learnings from outside community] 'there is a certain point when certain issues will cause an argument between the different personalities, and we know that' (Interview, Director, 3G)

Role of non-family members
- 'non-family become more family than the family themselves' (Observed during plant tour)
- '[former non-family Chair] During his long life, he was a trusted advisor and friend to three generations of the Fletcher family' (Family history book)
- 'More importantly, [former non-family Chair] was a tremendous friend to Bill Fletcher, as evidenced by their weekly lunches in [name] Golf Club where, to the amusement of those present, [name] would entertain the table with stories of his (and Bill Fletcher's) various escapades with [company] over the years. He is sadly missed by the [3 generations] of the family' (Family history book)
- 'As a result of [US family psychologist and advisor] skills and mentoring talents, the bond between the three sisters [Martin's in-laws] and their husbands became very strong. They were now acting in unison, and this served us all well' (Family history book).
- 'After that, I continued to retain [US family psychologist and advisor] to work with [wife name], myself and our children for around six years. I am absolutely convinced that had we not had that input from a family business expert, we might have broken up as a family business when the crash came in 2008' (Family history book)
- [on mentoring the next-generation and preparing them for strategic decisions] 'What was important is that each of them understood the businesses and the key issues that they faced so that, if a major decision had to be made, they would know the context around it. We achieved that over time' (Family history book)

From our many visits to the family office, the portrait of Bill Fletcher is ever present and presides over the family boardroom. A non-family financial advisor commented on the importance of portraits in the business premises when discussing international entrepreneurial opportunities:

> This [family portrait] seems entirely appropriate, even more so now that the third generation of [Fletchers] is increasingly taking on the reins of managing the family business. (family history book)

During our interviews, Martin Fletcher, pointing to the portrait of his father, commented:

> I often think what would [Jack] do in this situation, I find it comforting to have it there, an ever-present figure in all our lives.

How practices transform over time

As social, cultural, and technological contexts change over time, CoPs must also entail discontinuity and new practice introduction (Hamilton 2013). A significant limitation of the community of practice theory is that it 'tells us nothing about how, in practice, members of a community of practice change their practice or innovate' (Fox 2000, 860). In addressing these limitations, our findings demonstrate how new communities of practice emerge and become distinctive (Jaskiewicz, Combs, and Rau 2015). To complement the description of these findings, additional illustrative quotes of the nature of these practices and how they came into being are presented in Table 7.

One such example, showing the fluidity of the exchange of practices between families, emerged from a family associated with the Fletcher family. Through marriage, Martin Fletcher joined the community of practice of his wife's business, where he witnessed first-hand the need for the practice

of family conflict resolution, *'if the issues were not resolved I firmly believe it would have been the end of such an incredible hotel chain'* (observation, Chair, 2G). For Martin, given the magnitude of the in-law conflict, it was paramount to seek outside professional help (e.g. advisors), thus emphasizing how the space of the social organizes family-based practices. In their interactions with other community members, the Fletcher family learned about the role of *family governance* in associated practices such as conflict management, succession planning, and ownership consolidation. Based on his experience, Martin intuited similar governance practices in Dunheda, *'as many businesses we were very capable of running the business and had done so for many years, but the relationship stuff, the softer issues we just brushed under the carpet'* (observation family training programme, Chair, 2G). This insight was the catalyst for the new practice of family governance in Dunheda. Drawing upon their experience of working with other multi-generational family firms, non-family executives introduced governance practices that prioritized clarity, transparency, and inclusivity. This influenced how information was shared, discussed, and disseminated within Dunheda. Furthermore, the way in which non-family executives handled conflicts established norms for conflict resolution within the broader workplace.

A view exists that while incremental change is achievable, the destruction of old community practices is required before new practices can emerge (Roberts 2006). Our findings show how a practice, once prominent within the family, can wane in significance and decay over time, only to be replaced with a new practice (Schatzki 1996). For Dunheda, human resource practices with strong altruistic tendencies prevailed for almost three decades. Through professional education and prior industry employment, Martin learned about the need for stringent corporate governance driven by non-family executives. In particular, non-family executives demonstrated to Martin how robust and fair employment practices that respected the traditions and values of the family business could be embedded in the firm. Altruistic practices were replaced with *transparent employment* practices. Martin's initial learning was fed forward to the wider community of practice within the firm, where it was accessible to all organizational members. Our findings refute an assumption that CoPs are static and resistant to change (Roberts 2006). Feedback (in addition to feedforward) family practices were also used; Peter Leonard, the non-family CEO for 10 years, provided insights into the community of practice's feedback loop: *'I meet with Martin on a weekly basis and discuss [Dunheda] issues which he communicates to the family (non-family CEO) if applicable'*. In addition to one-on-one meetings, it was evident through our observations that board meetings – where the entire community of practice is represented by family and non-family members – were also used to reinforce practices, especially considering mistakes made- *'there's a recognition that we need to learn from these decisions we took that haven't gone our way or decisions that management took that shouldn't have happened. We have a very social board which I think is very important'* (Non-Executive Director 2, 3G). Non-family executives assisted Martin to introduce communication practices that prioritized clarity, transparency, and inclusivity. This influenced how information was shared, discussed, and disseminated within the family business.

Discussion

Through our study of an 86-year firm, we explored how a CoP developed based on mutual understanding, effective reflection, and knowledge transfer between both family and non-family members. Within such a Community of Practice, family and non-family members within a family business develop a sense of identity across generations as they engage in practices within and outside of the business (Giovannoni, Pia Maraghini, and Riccaboni 2011; Zellweger, Eddleston, and Kellermanns 2010). We enrich the CoP literature by developing an understanding of how a CoP is socially constructed across generations of a family business through cycles of active participation, reproduction and transformation. We contribute to a richer understanding of the intertwining of the dimensions of the past, the present, and the future in CoPs.

Over time, communities of practice can become rigid and reluctant to embrace change, as knowledge associated with an existing predisposition of a community, or a legacy from its founder, is likely to be adopted more readily than the knowledge that refutes current practices and identities (Roberts 2006). Our findings show how a CoP can avoid rigidity traps by engaging with multiple, overlapping communities of practice, not only in one family business but situated between non-family and other family firms. Thus, some practices extend the space of the CoP whereby new members, family or non-family, bring their own rituals, stories, and practices and, in so doing, extend the temporal aspects of practices. In our study, family member Martin used his stream of experience to generate insights from his exposure to in-law family business conflict, thus emphasizing the significance of learning from mistakes and encompassing family-based practices from the wider community of practice. Long-serving non-family senior executives played a significant role in the family governance practice brought from other interconnected CoPs and professional governance practices that allowed the family business to scale and grow. Our findings suggest that, for family firms, the stream of experience outside of the immediate family not only affects other individuals through conscious interactions but can also infiltrate the family firm's broader CoP through being exposed to family practices from other businesses.

In our CoP, we observed how practices are layered over time, and while some practices emerge and become distinctive, other practices, which were once essential to the business, decline in importance. For Dunheda, the founder uncovers lessons from certain incidents reverberating down the generations and throughout the CoP after his departure. For instance, the founder's idea for the nation's first toll bridge resulted from his intuition and resilience to find a way that reflected his long term oriented approach to practice. In doing so, we contribute to current debates surrounding evolutionary practices by demonstrating how family firms can construct collective identities across generations through actions within their CoP (Ferraro, Etzion, and Gehman 2015). We extend that notion by understanding how non-family members can become a part of that collective identity through extended participation in family and business matters. The temporal implications here are significant, as the founder's actions and attitudes are mirrored by subsequent family generations and long-serving non-family senior executives, as well as the wider CoP of the firm, even after his death. Conversely, practice surrounding altruistic tendencies and family-centric attitudes decayed over time to be replaced by new practices emphasizing clear communication channels and governance structures in family and business practices. Non-family members bringing new practice appears central to the professionalization of practice around governance. Our findings show how non-family practices can enhance the learning opportunities for family businesses. Our findings are particularly pertinent to legacy practices in family firms, where the attitudes and actions of earlier generations do not align with future desired behaviours, and current members (both family and non-family) work to transform undesirable practices or bad habits (Kidwell, Eddleston, and Kellermanns 2018).

Our research offers new insights into the pivotal role of non-family members in a CoP, namely how learning and resultant practices are shared. Our inclusion of non-family members in this process supports the theoretical notion of an apprenticeship model of situated learning, whereby CoP members at the periphery (i.e. non-family members) enhance their learning engagement through their participation in the CoP (Lave 1991). The CoP's concept of legitimate peripheral participation, begs the question – how is legitimacy to participate in the CoP negotiated and determined? This study contributes to understanding how participation defines the social structure of a community of practice, its power relations and conditions of legitimacy. For non-family participation in everyday practice ultimately defines legitimacy and the possibilities for learning in the family business.

Our findings advance the theoretical work of Høyrup (2004) by suggesting that, for non-family members, it is not the support for reflection itself that is conducive to collective meaning within a CoP, but rather the socially driven transfer of knowledge across time through internal communication practices that manifest as a corollary of this supported reflection. Moreover, as Roberts (2006, 635) notes, 'given that

knowledge is transferred through social interaction within communities, then businesses need to pay particular attention to their recruitment and training policies to ensure that they maintain an appropriately skilled workforce to maximize the benefits of communities of practice'. The family business literature suggests that for the family to fully integrate with the CoP, an individual member's interpretation must be supported and reaffirmed, especially when hesitation exists (Lawrence et al. 2005). In our study, we find such supportive and affirmative behaviours being extended beyond family members to include long-standing non-family members. From our findings, we suggest that the non-family members' (e.g. non-family CEOs) patience for long-range investment returns is underpinned by an engrained collective belief throughout the CoP in the family business's long-term market perseverance across generations. This ultimately leads to a willingness to engage in practices that provide financial capital for projects with future growth potential rather than what is described in the associated literature as 'immediate wealth creation' (Donckels and Fröhlich 1991). Moreover, we show how the value potential of non-family engagement can be extracted through the process of explorative or feed-forward actions across the CoP. Previous work has largely focused on the learning between generations within the family. In this study, non-family executives (long-term employees) were mentors to the next generations. A hybrid (family and non-family) intergenerational mingling of practice, using a CoP perspective, has much to offer in understanding the long-term orientation and sustainable practices in the family business.

Conclusion

In this paper, we have conceptualized the family business as a community of practice and, in so doing, have explored the nature of practices that are conducted and transmitted across generations within this community. To address this important topic, we drew upon an in-depth historical case study of an 86-year-old family business spanning three generations, drawing upon 50 interviews, 673 archival documents, and 25 observational instances across a 14-year period. Furthermore, in order to facilitate this historically based investigation, we utilized a Community of Practice Lens (Wenger 2000), which enabled a more nuanced understanding of the dynamics of a family firm in terms of how many individuals that is, family members and non-family members, collectively learn about family business practices and how such practices are created, maintained and transformed across generations.

In concluding our arguments, we make the following key contributions to theory development. First, we contribute to practice turn by demonstrating how practices are created, maintained, and transformed in a family business between and across generations. We identify four family business practices that were brought to bear within and across generations of the business; long-term orientation; stakeholder value congruence; entrepreneurial venturing, and resilience despite failure. Second, with these findings, we extend previous conceptualizations of the family business as a CoP (Fotea et al. 2014; Hamilton 2013) by demonstrating how learning and practices are shared and constructed across generations of a family business to include both family and non-family members through cycles of reproduction, transformation, and active participation. This is significant as these practices cascade across family members and to and through non-family members. Non-family members introduce the new practice to the CoP that allows the business to transform, and they participate in mentoring the next generation alongside family members. Hence, extending the collective identity of the CoP, which is the family business within and across generations. Third, we contribute to the family business literature by illuminating how family businesses can avoid path dependency sometimes associated with CoPs by engaging with multiple overlapping communities of practice. The assertion that Communities of Practice (CoPs) within family businesses are not sealed but overlapping emphasizes the dynamic and interconnected nature of these communities, suggesting a rich exchange of knowledge, practices, and experiences among diverse individuals within the family business ecosystem. This perspective aligns with the idea of viewing family businesses as complex systems where family and non-family members coexist and collaborate. The notion of overlapping systems also provides a nuanced framework for discussing the peripherality of non-family employees within family businesses, acknowledging that they may operate at the edges of the

family-centric core. In essence, this perspective encourages a holistic view of family businesses as dynamic and interconnected communities of practice where both family and non-family members play integral roles in shaping the collective knowledge and practices. The nature of practices within multigenerational family businesses also reveals a layering effect, whereby some practices emerge and become distinctive, while others decline in importance across time. We thus offer insights into Schatzki's (2020) awareness of the time-space dimension(s) of practices, such that CoPs are situated within both social spaces and a specific period of time that is mediated by both the past and future (Suddaby et al. 2023).

We acknowledge that this research has been subject to several limitations, which create opportunities in the form of future research directions. For instance, our case study dataset was expansive and drew upon a large pool of interview, observation, and archival data, thus establishing theoretical generalization (Yin 2013). However, using a single case study approach may be somewhat limited regarding external validity (DeMassis and Kotlar 2014). Accordingly, future scholars can advance our research findings by way of a multiple case-study approach to explore the same phenomena, thus attaining empirical generalization. Whilst CoP extends our understanding of forms of learning in a social context, it was critiqued from the outset for failing to address issues of conflict, power and control (Fox 2000; Contu and Willmott 2003). Indeed Roberts (2006), in assessing community of practice as an approach to knowledge creation and dissemination, presents a number of unresolved issues and difficulties including an understanding of power dynamics. This remains an under investigated aspect of CoP theory and one worthy of future investigation. Relatedly, whilst our interest was on how practices facilitated the flow of knowledge, information and resources between family and non-family employees, we acknowledge that our sample relied on non-family employees in senior positions. As a consequence, future research could look at how practices are infused across the entire family business. Finally, while CoPs evolve and transcend over time, future research could investigate practices which existed in earlier generations of the family business but did not persist across time, which in the case of Dunheda included approaches to family ownership and distinctive industry specific knowledge.

Notwithstanding the limitations outlined above, we believe that our study offers an important contribution to the family business and community of practice research domains.

Disclosure statement

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