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# A FAMILY BUSINESS AS A SPACE FOR INTERGENERATIONAL LEARNING INTERACTIONS

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## **Abstract**

*The broadening use of the concepts of lifelong and lifewide learning has opened space for exploring learning processes beyond official educational institutions providing formal education. Environments where adults learn intensively in both informal and non-formal ways include businesses. The specific environment of family businesses is an attractive research topic in the context of intergenerational learning and consistent with the concept of workplace learning (Evans, Hodgkinson, Rainbird, & Unwin, 2006; Novotný, 2009). A family business is a place where intergenerational learning is a necessary and desirable part of its everyday operation. One might even speculate that the success of the family business depends to a certain extent on intergenerational learning among the employees, who happen to be family members. This aspect of family businesses has not yet received research interest in the Czech Republic.*

*This paper presents findings concerning intergenerational learning interactions in family businesses, what initiates these learning interactions, and their form and content. The findings are then related to organizational culture, i.e. the culture of the family business.*

## **Keywords**

*Family business, organizational culture, workplace learning, intergenerational learning, learning interactions*

## Theoretical framework

While family businesses control nearly 80% of the GDP created by the private sector on an international scale, their share of the GDP in the Czech Republic is slightly below 25%, despite the fact that the number of family businesses keeps growing (Odehnalová, 2009). This situation is due to the developments after 1948, when private property was taken over by the state, and the private sector, including family businesses, was nearly wiped out of existence. The turning point was the political changeover of 1989, when new businesses could be established and traditions of the interwar republic resumed.

Now, more than 25 years after their re-emergence, family businesses are not exempt from demographic trends, particularly population ageing. Many family businesses are thus facing a change of generations and have to deal with passing the legacy and family tradition on to the next generation. This co-shapes the space for intergenerational learning. Although there has been a lot of literature concerning age-heterogeneous work teams and the ensuing challenges, most of this research focused on management or economic issues rather than the andragogic point of view. These studies, with smaller or greater empirical emphasis, define ways to cope with age variety in the workplace while preserving continuity and effectiveness of operation (e.g. Ilmarinen & Tuomi, 2004; Ropes, 2013; Spanning, 2008; Vendramin, 2009). Empirical studies explaining cross-generational learning processes in environments as specific as the family business are less numerous, and are very rare in the Czech Republic. Such studies address teaching or learning the family business (Lansberg & Gersick, 2015; Sorenson & Milbrandt, 2015), continuity and stewardship (Konopaski, Jack, & Hamilton, 2015; Le Breton-Miller & Miller, 2015), or organizational culture specifics (Ruiz Jimenéz, Vallejo Martos, & Martínez Jimenéz, 2015; Barroso Martínéz, Sanguino Galván, & Bañegil Palacios, 2013). Our approach integrates these topics to a certain extent, attempting to provide a comprehensive view of intergenerational learning in family businesses.

### *On family businesses*

What businesses should be regarded as family ones? It is evident that labelling businesses simply as family or non-family is not sufficient. The two labels are rather two opposing poles of a continuum, the scale including countless variants differing by the role that family plays in the operation of the business and by the extent of its influence.<sup>1</sup> This assumption is the starting point for the definition of family businesses by Shanker and Astrachan (in Koráb, 2008, p. 20), who describe family businesses as having “efficient control of strategic management and interest in the business on the part of families.”

Their further specification of family businesses requires that “the founder, or their successor, lead the business and own its stock, which gives them the right of voting in general assemblies.” Specifically, they refer to family business as “business in which several generations are involved while the family is owning and managing the business, and one or several family members possess major executive power.” In our research, we follow Strážovská and Strážovská (2002) in defining family business as a business whose owner regards it as a family one, intends to pass it on to a close relative in the future, and employs at least one other family member who is involved in its daily operation. This definition, although incorporating the subjective view of whether the owner regards it as a family business, is in agreement with the definition by Shanker and Astrachan quoted above.

Family businesses offer many advantages but also have some risks. The cohesiveness of the family plays a role and informal relations are important. The emphasis on high quality motivated by the wish to maintain a good business reputation in association with the family is a potential advantage (Lukeš & Nový, 2005). In addition, family businesses are usually built with a view toward long-lasting existence spanning several generations (Koráb & Kalouda, 1998). This is confirmed by Aronoff and Ward (2000, p. 22), who claim that “family businesses are run with the idea in mind that they are going to be passed on to another generation in the family.” The idea of building up the business and passing it on to the coming generations is typical of family businesses, which emphasize building a family tradition rather than generating profit. This is a major influence on organizational cultures of family businesses, as the successful handover to the younger generation dominates the list of values of the owner/s (Aronoff & Ward, 2000).

A research project called “The Situation of Family Businesses in the Czech Republic” (*Association*, 2015) confirms this idea, specifying that in two-thirds of family businesses the tradition is expected to be passed on to the younger generation. On the other hand, half of them have not initiated the handover process yet. It is also a fact that family businesses anticipate the whole

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<sup>1</sup> A model for measuring the influence of family on the business referred to as F-PEC was created in 2001; it is based on three factors: Power, Experience, and Culture. Each of these factors has subcomponents. Power is defined by equity, control, and management. Experience is defined by the generation membership of the owner, the generation active in business management, and the number of members actively involved in the business. Culture is defined by the overlap of the values of the family and of the business and by the culture of the family business.

handover process to last a fairly long time (*Situace*, 2015). One reason may be the fear of differing values, goals, expectations, and working habits between the younger and older generations. Typical qualities of young staff include value flexibility, informality, refusal of boundaries, a desire to achieve fast results, mistrust of authority, energy, enthusiasm, knowledge of cutting-edge technologies, and use of social networks. Qualities typical of the older generation of staff are fixed and structured values, insistence on clear boundaries, tendency to formality, respect for authority, experience and healthy distance, and preference for personal contact and personal bonds (Ramsey, 2011). These differing qualities indicate differing attitudes toward work and career as well as differing styles of giving and taking in new information and learning (Spannring, 2008).

These differences may be perceived as a discrepancy between the generations sharing the same working space. On the other hand, age diversity may provide a number of benefits, such as acknowledgment and activation of older employees, opportunities for their involvement and integration in society and their engagement in support networks, as well as problem-solving inspiration from the experiences of other generations (Schlimbach, 2010). Vendramin (2009) believes that the factors differentiating the individual generations<sup>2</sup> are not limited to age; attitude toward work and other factors may also play a role.

#### *On intergenerational learning*

The general definition of intergenerational learning has been published by the authors of the present paper many times (e.g. Rabušicová, Kamanová, & Pevná, 2011). We will now link the concept to learning processes associated with the workplace, specifically with a family business. Within this narrower focus, we regard intergenerational learning as a part of workplace learning. The concept of workplace learning, as Novotný (2009) points out, does not have a strict definition, as it comprises both learning for the workplace inherently based on the needs of the workplace and learning that is directly supported and organized by the workplace. Intergenerational learning, which is at the centre of our attention, does not concern formal structures and formal learning, but learning at the level of “informal contacts, spontaneous

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<sup>2</sup> There are undoubtedly differences within the generations, which are not homogeneous groups. We are naturally aware of the fact but do not reflect it in our research.

interaction and communication, social structures and spontaneous learning” (Novotný, 2009, p. 49). To be more precise, “the goal of this learning is to achieve a change in the knowledge, skills, attitudes, and experiences which are necessary for handling the job and to contribute to desirable changes in company operation” (Novotný, 2009, p. 48). This is not achieved through activities deliberately organized by the company. In this sense, therefore, family businesses may be regarded as communities of practice, i.e. environments in which informal learning takes place, and members of the community, i.e. family members of differing ages, are learning through everyday activities (Wenger, 1998).

To approach this complex topic, we opted for the model of the learning process proposed by Illeris (2007): learning is conceptualized as a process in which learning interactions (intergenerational in our case) mediate transmission of learning contents, thanks to *incentives*. The whole process depends on the *societas*, i.e. an external social context in which specific learning interactions take place. This learning is learning between generations in which three components are of key importance: incentives, interactions, and learning content. The dimension of incentives involves motivations, emotions, and will; it provides the mental energy necessary in order for learning to take place. The dimension of interactions involves the way in which the learner relates to the surrounding environment in a specific learning situation. Illeris (2007) distinguishes the following forms of interaction: perception (learning based on a stimulus which was not actively sought), transmission (the educator<sup>3</sup> is passing learning content on to a learner), experience (learning through experiencing), imitation (learning through imitating), activity (an active search for content on the part of the learner), and participation (learning through being involved in a specific situation the learner is co-shaping). All these forms of interaction can manifest as covert or overt, as will be shown. The content dimension, as Brücknerová and Novotný (2015) explain, must be understood as a change broader than just a change in knowledge, skills and attitudes; for instance, it includes a willingness to find the meanings for what has been learned and acquisition of a general readiness to understand and critically view the world around as well as oneself.

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<sup>3</sup> We are using the term *educator* as a counterpart to the learning *recipient*, i.e. the learner.

*On organizational culture*

The implicit framework for intergenerational learning is provided by the organizational culture, which is rather specific in the case of family businesses. In agreement with Lukášová et al. (2004), we view organizational culture<sup>4</sup> as “a set of fundamental assumptions, values, attitudes and norms of behaviour which are shared within the organization and which are reflected in the thinking, feelings and behaviour of members of the organization and artefacts of material and immaterial culture” (p. 22). This definition generalizes the perspectives of a number of authors dealing with organizational culture (see Hofstede, 1999; Senge, 2007), who usually address several fundamental elements.

Schein (2004) structures the elements of organizational culture into three basic levels that are differentiated in part by the degree of external manifestation of these elements, i.e. their visibility for an external observer. The most visible level of organizational culture, i.e. the conscious level which is the easiest one to observe and to change, is artefacts. Artefacts may be material (spatial organization of the company, technological equipment, advertising, etc.) or immaterial (language, stories, myths, company history, company heroes, etc.). The level which is partly conscious involves norms, values, and attitudes influencing people’s behaviour in certain situations. These elements of organizational culture can be observed and changed to a certain extent. The last level is represented by premises, i.e. unconscious and hard-to-change assumptions (ideas) about how things work.

Sources of organizational culture may be diverse, ranging from environmental factors (national culture, business environment, competition) through the influence of the founder, a dominant leader, owner, or manager, to company size, length of its presence on the market, or the use of technologies. Sources which should not be overlooked also include the organizational structure of the company, the type of management, and the leadership type (Lukášová, 2010).

In addition to the content of the organizational culture, its strength is important – simply put, strength is the degree to which the content is shared. This affects the homogeneity or heterogeneity of the organizational culture – a company may have, for instance, a strong organizational culture with all

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<sup>4</sup> It is necessary to distinguish between organizational culture and organizational climate, the latter being a level of perception, i.e. how an individual perceives and experiences the situation in the organization.

employees sharing more or less the same values and norms and using similar behavioural patterns, or a weak organizational culture in which people's behaviour is more strongly influenced by their individual characteristics and opinions (Lukášová, 2010). In family businesses, a rather high degree of sharing the contents of the organizational culture, i.e. a strong organizational culture, can be expected.

### **Research methodology**

The objective of the research is to describe and analyse reflected intergenerational learning situations in family businesses, i.e. such intergenerational learning of which the respondents can give an account. Using the concept of learning proposed by Illeris, we break down learning situations into three components – incentives, interactions, and contents. We answer questions about the origins of these interactions: what leads to them, what forms they take, and what contents are transmitted within them. All of this is viewed within its embeddedness in the organizational culture characteristic of family businesses.

The research presented in this paper is part of a project supported by the Czech Science Foundation<sup>5</sup> devoted to intergenerational learning across different social environments. It focuses on family businesses as a specific kind of environment: the very nature of the operation of family businesses creates expectations of processes of intergenerational learning. Organizational learning usually takes place at three levels: for individuals, for groups, and for the organization as a whole (Tichá, 2005). The intergenerational learning in family businesses takes place at the level of individuals who are members of different generations.

Qualitative methodology was used. To collect data, we used interviews focusing on pre-defined areas of interest; apart from these, further areas appearing to be of interest during the interviews themselves were also explored. The interviews were conducted with people representing various generations of owners/employees of family businesses and families owning

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<sup>5</sup> The project, called Inter-generational learning across social environments was conducted in 2013–2016 with the support of the Czech Science Foundation.



these businesses. The interviews<sup>6</sup> lasted from 45 to 60 minutes. One interview per respondent was conducted. Full transcripts were made based on the recordings.

The set of interviews contained 15 interviews with respondents from six family businesses. The selection was purposeful and employed specific criteria. The features these family businesses shared were their size in terms of number of employees, the structure of the business, family ownership, and co-existence of two or more generations within the business. The specific fields of operation do not play an important role in the research (they included both manufacturing and service-providing businesses). All of the family businesses had two to ten employees – they were all small businesses. The organizational structure of the selected family businesses was defined by the majority of employees being members of the owner family. All of the family businesses were owned by a family member who was an active agent influencing how the business was run, usually in the position of the general manager or its equivalent. Four of the businesses were three-generational and the remaining two were two-generational. The youngest generation was represented by people aged 20-29, the middle generation by people aged 30-60, and the oldest by people aged 61-70. The selection was made by the snowball method. If a business met the criteria, the people representing it were asked for an interview. The interview included questions concerning further potential family businesses. The individual respondents and their characteristics concerning age, self-classification within a generation, and work position in the business are presented in Table 1.

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<sup>6</sup> Interviews were conducted in the framework of data collection for the project and within two master's theses (Horáková, 2013; Ležáková, 2015). Data from the interviews for our analysis was used with the consent of the authors. Our analysis was carried out separately from their analysis.

Table 1  
*Overview of Respondents from Family Businesses*

name	age	generation	business	position in businesses
Alžběta	29	youngest	technical (car) inspection centre	administrative staff
Alan	26	youngest	technical (car) inspection centre	odd jobs
Gréta	49	middle	technical (car) inspection centre	administrative staff
Vilém	70	oldest	technical (car) inspection centre	owner, manager
Viky	24	youngest	second-hand bookshop	shop-assistant
Karel	50	middle	second-hand bookshop	shop-assistant, manager
Hynek	20	oldest	undertaker's	administrative and technical staff
Jindra	39	middle	undertaker's	administrative and technical staff
Slávek	61	oldest	undertaker's	owner, manager
Milan	39	middle	furniture manufacture	owner, manager
Marcela	43	middle	furniture manufacture	administrative staff
Drahoš	26	youngest	furniture manufacture	salesperson
Honza	23	youngest	furniture manufacture	salesperson
Libor	24	youngest	liqueur manufacturer	manager
Šimon	51	middle	watch-maker	owner, manager

The interviews were first scrutinized by three researchers in order to identify core topics for more detailed analysis. The first analytical step was thus thematic analysis. Following a joint discussion, subtopics were selected and the interviews were open-coded. The next analytical step was applying an external data structuring model – the model of the learning process proposed by Illeris. Using this model enabled us to break down individual intergenerational interactions into segments and infer what motivated the learning situations

(incentives) and what their content was, as well as the external framework of the learning process. We carried out an in-depth analysis of these categories within the model and connected them, where possible, with findings by Brücknerová and Novotný<sup>7</sup> (2015).

## Findings

### Intergenerational learning interactions in family businesses

Following Brücknerová and Novotný (2015), the intergenerational learning interactions were analysed as overt and covert. An overt intergenerational learning situation is one in which at least one of the participants perceives the situation as a learning situation, i.e. as a situation with an educational purpose. According to Brücknerová and Novotný (2015), three forms of interaction distinguished by Illeris (2007) are typical: transmission, imitation, and experience. In transmission, the educator who wishes to pass on some content is a key person. Transmission can be illustrated, for instance, by quoting Libor: *“But as I’m saying, Dad tells me once and leaves me to it, and if he sees that I’m a bit lost, he may tell me, ‘That’s fine Libor, you need to do it this way and be careful about this next time.’”* Similarly, Šimon observed, *“But when I tell him when he is opening a wrist-watch: ‘Look, there it is, careful, this might snap apart, that, that, and that’, and he knows what to do then.”* With imitation, the learning content is acquired by imitating the activity of the educator, who assumes the role of a model to be imitated by the learner. This type of learning situation is very frequent in family businesses. Viktor’s account refers to imitation in this way: *“Well, sure, I watched my father communicate with a client, I had never done that, you know, how to greet them and all that concerns clients.”* Viktor was watching his father at work and learned by observing him. His father was his role model for that activity. With experience, the educator is reflecting an activity performed by the learning recipient. This type of interaction was illustrated by Libor:

*When I’m ordering dried milk, which is something we’re putting into milk liqueurs, a top product of ours... or I’d say what we’re known for, I have to watch out for milk prices... how much it costs there, and there, because the prices are so very...*

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<sup>7</sup> The procedure was analogical to the one used in the study “Typology of intergenerational learning among teachers” (Brücknerová & Novotný, 2015), which proposes a typology of intergenerational learning among teachers and presents findings which arose from analysis of in-depth interviews with teachers in 22 basic and secondary schools. This study was conducted within the same research project (GAČR 13-07234S).

*variable. You always need to find the best, to avoid making some stupid mistake... It is important and you need to keep checking things. But as I'm saying, Dad tells me once and leaves me to it, and when he sees that I'm a bit lost, he may tell me, 'That's fine Libor, you need to do it this way and be careful about this next time.'*

A covert learning situation does not arise in order for someone to learn; learning is an unintended consequence of a situation. These situations are primarily perceived as learning situations by neither the educator nor the learner. According to Brücknerová and Novotný (2015), two forms of interaction distinguished by Illeris (2007) are characteristic of this type of learning situation: perception and participation. Perception can be grasped from Alžběta's account:

*And me specifically, I never liked making phone calls, but as I found out that one can do it and it's not a problem, I could see that a lot of things can be arranged over the phone, so I learned from my mother to get on the phone, and look at me, it's not a problem anymore... It used to be I was experiencing [repeatedly] a little difficulty, but I learned from my mother that there was nothing difficult about it.*

Similarly with participation, learning is not the main goal of the interaction. It is often unconscious learning and this type of interaction is also frequent in family businesses. Alžběta, for instance, described a situation when she is tackling work issues together with her mother, discussing possible solutions and learning from each other: *"We all do everything, or we all understand everything one could say, there is no typical teacher role, it is mutual, it is about one person coming up with something and then us discussing it among ourselves."*

The typology of learning situations distinguishing overt and covert learning and the five types of interactions (transmission, imitation, experience, perception, and participation) as adapted from Brücknerová and Novotný (2015) proved useful in our analysis of learning in family businesses.

### **Contents of intergenerational learning interactions**

Contents passed on in learning interactions may be categorized using a variety of criteria such as types of learning (social, cognitive, affective, motor), or by differentiating between knowledge, skills, and attitudes. Beyond this general framework, in analysing data from family businesses, the categorization of learning contents used by Brücknerová and Novotný (2015) in terms of open and closed contents proved useful.

Closed content is not transformed by the learner in any way and the learner accepts it as it has been delivered by the educator. With open learning contents, the given learning content is transformed or elaborated on by the learner. This type of content is defined from the perspective of the learner, as it is the learner at whom it is aimed and the learner who uses its results further on. As for activity or passivity on the part of the learner, we can say that recipients of open contents<sup>8</sup> assume an active role, while recipients of closed contents are passive.

In addition to distinguishing active and passive processing of learning contents by their recipients, it proved useful to consider whether the contents being transmitted come about thanks to operations in the company, or independent of them. Thanks to the specifics of family businesses, intergenerational learning interactions in them hardly ever cease; both internal and external contents are transmitted.

Internal contents are contents connected to the operation of the family business and arising because of it. The learner would not be able to acquire them without working for the family business. The contents are directly dependent on the learner's presence and work involvement in the family business. They are at the same time essential to the operation of the business and specific to the particular working environment. They concern knowledge of colleagues as persons, workplace relationships, knowledge of cooperating businesses, of competition, ways of handling customers and taking care of them, etc. Drahoš describes how internal learning contents are acquired in the following way:

*I don't want to flatter myself too much but I guess I'm the only person who is in social contact this much and I collect feedback from customers by meeting them, by having appointments with them. I think I'm crucial in this and a source of information concerning all this in the company. Well, my brother is younger, he has little experience of this kind, he has never worked elsewhere.*

Marcela emphasizes acquisition of internal contents which help her better understand activities in the business:

*When I saw this in the shop, I was asking why this was done in that way and he was explaining things. He is like that, when he sees that I'm interested, he wants to explain it to me in detail. And I'm glad to know then. Now I know a lot of things I don't even need to know, but it is useful to have an idea of the whole thing.*

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<sup>8</sup> In addition to the open and closed categories, Brücknerová and Novotný (2015) categorize learning contents by applying the criterion of change to the existing state of knowledge experienced by the learner and by scope (specific thing or situational aggregate). We did not include this categorization into our analysis.

Continuously learning internal contents is reflected in career growth for which having and using skills specific to the business is very important.

External contents are not connected to the family business as such; the employee has acquired them somewhere else: at school, for example, or in a previous job. External contents are acquired outside the family business. Typical examples are ICT skills, competences in foreign languages, etc. Despite this or for this very reason, external contents concern expert knowledge and skills important for working at a given position, as Alan's example shows: *"Well, I occasionally taught Granddad to communicate using the PC, so those new technical technologies, I helped there."* Or Hynek described a situation when he helped to innovate the business thanks to 'owning' an external content: *"So I had the idea that I would write, make out invoices when orders arrive, when a person comes, that I would do this straightaway on the PC."* Applying knowledge and skills acquired outside the business is beneficial for keeping up the business or developing it. This is why acquiring them continuously is important both for the individual and for the business. Transmission of external contents leads to disintegration of long-established processes and stale work routines. This may cause a sense of refusal or disrespect on the part of the educator or the recipient, and potentially stir up conflicts.

Our findings show that individual types of contents are linked to specific generations. External contents tend to be connected with members of the younger generation while the older generation tends to carry internal learning contents. Older generations direct learning at younger generations because they want to pass on internal contents, and they learn because they want to acquire external contents. The younger generation is learning from their seniors because they need to acquire a maximum of internal contents linked to the operation of the business as fast as possible, and they help the older generation to master external contents. This categorization of learning contents thus reveals a clear correlation with the generational view of learning.

### **Incentives leading to intergenerational learning situations**

This part of the text focuses on how intergenerational learning situations arise and answers the questions of what stimulates them and what is at their origin. In the model by Illeris (Illeris, 2007), this impulse involves incentives, i.e. "energy which drives us to learn." Incentives are a set of motivations, emotions, and will on the part of the participants to be involved in learning situations. The data on family businesses allow us to differentiate family-business-oriented incentives and own-benefit-oriented incentives.

Family-business-oriented incentives can be regarded as primarily from the perspective of the family business. If incentives are the motivations and

mental energy necessary for learning, then one of the family-business-oriented incentives is the effort to keep the business going and/or expand it. Gréta said:

*Some new legislation or programmes we have to stick to, new regulations and so on ... we have to go by them ... we have to adjust, learn it and work obeying these regulations ... I of course study it and then we talk about it because when I don't understand I need someone to explain it to me and I also need to ask questions ... So we naturally learn from one another if the business is to keep running, if everything is to be fine.*

The motivation to learn oriented on maintaining the function/s of the business is evident in this excerpt.

Another incentive is the effort to keep the family tradition alive and maintain family know-how, as evidenced by Libor's words:

*The field makes me likely to take the business over one day, so I take it to be my kind of destiny to take the business over one day and work here. I wanted to do something else but then I changed my mind and said to myself – why do something [else] when we have a family business bearing my name.*

Libor stated that his primary reasoning involved a decision to become involved in the business, not for the sake of his own interest, but to keep the family tradition alive. He put family and business-related interests above his own. Another important incentive is investing in one's own nest: "So he learned what he needs to know and when he needs to, when he wants to learn something new, it's mainly from the young generation ... because it benefits him and he wants to learn" (Gréta) or "Of course it is good because there is more control and more interest that the company is doing well because it is a way to make a living for the family" (Vilém). Hynek said: "I may own the business one day and I have to learn all that somehow and I cannot think it out all by myself." This motivation was very frequent with the respondents. They perceive their operation in the business, their time investment in it as an investment in their own – family – business. Everybody learns and teaches others as a way of investing into their own business. These are relatively stable and long-lasting incentives.

Another type of incentives is own-benefit-oriented incentives. They provide benefits from learning situations that are essential to the recipient or educator. They bring immediate tangible profits to the individual staff rather than the family business as a whole but they do have a positive impact on the operation of the business in the long run. Respondents often mentioned their willingness to deliver the best work possible or to perform their role in the best way possible because a failure in their job gets reflected in their family life as well. Focusing on delivering the job flawlessly is in the respondents' own interest because this benefits their private and family lives best. This



incentive creates a great opportunity for the creation of intergenerational learning situations.

Getting involved in intergenerational learning interactions is often also the easiest solution for respondents, and this is why they opt for it: “*Well when I, for instance, teach someone to do something with the PC, then it makes my own life easier because I don’t have to do it myself, etc.*” (Hynek) or as was also suggested:

*When I’m not sure and I can’t find it on the internet I ask and he has the experience of what we can and what we cannot do ... Like in dealings with authorities, I do not hesitate to draw on Grandpa’s experience because it makes everything so much easier. In a single moment I resolve the issue I need to resolve and draw on the experience of my senior because he’s got it. (Alžběta).*

Getting involved in intergenerational interactions also acts as a time-saver because the person with more experience in a particular area is teaching and can thus go straight to the core. The learning person need not search through a number of sources, or sort out, evaluate, and check the information. It is also important that the information being transmitted is a close fit with the situation that has provoked the need to learn. As Jindra explained, “*From the most experienced one I guess, which is my father, and as the saying goes ... why ask a little expert when you can ask the real one.*” Hynek presented similar reasoning: “*... well if I had to learn all that by myself and prepare for everything on my own, it would take me four times as long compared with when someone who already knows tells me,*” as did Alžběta: “*As for Grandpa, I gained a lot of time by teaching him because at the start I had to be by his side whenever he was sending an email or answering one.*”

Respondents in the educator role experienced a sense of altruism thanks to intergenerational learning. Gréta’s account demonstrated this: “*Well, when I succeed, it brings me a sense of satisfaction that I did something for someone, that I helped someone, that I did it and he or she now understands it and can do that.*” Besides an impulse for intergenerational learning, which is based on a need to help another person, a part of the motivation is to achieve a sense of satisfaction that one can benefit others, as Alan commented: “*Like a sense of satisfaction that I’m smarter than others. And that I know more than others ... That smugness,*” or, “*One feels kind of important in a certain way, that someone comes and asks you for advice. That’s a great feeling*” (Alžběta). This type of incentive is shorter-lived and changeable. It is also more closely connected to the role and position the respondent has in the business.

It is necessary to say that these incentives support, rather than exclude, one another. It cannot be said that some would be more frequent among educators or recipients or older or younger family business employees. Such regularities, although they would support the intergenerational dimension of learning situations, cannot be traced among the data we analysed.



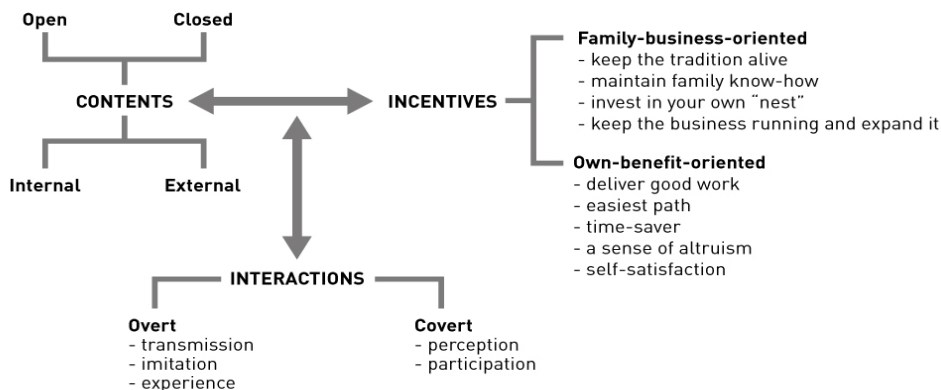


Diagram 1

*Learning interactions in a family business*

Summarizing the findings on the individual components of learning situations in family business (see Diagram 1), two basic types of learning situations can be distinguished: overt and covert. Overt interactions consist of three types: transmission, imitation, and experience. Covert interactions consist of two types: perception and participation. These intergenerational learning interactions concern various types of contents being transmitted, which can be overt external, overt internal, covert external, and covert internal depending on whether the knowledge or skill has been acquired outside the business or is connected with its operation, and depending on whether the learner uses the knowledge or skill and develops it, or just accepts it. The nature of the contents and the type of learning interactions are activated by, and vary according to, the incentives at play. In family business, family-business-oriented incentives are common, namely the wish to keep the business running and expand it, the wish to keep the family tradition alive and maintain the family know-how, and the motivation to invest in one's own nest. Own-benefit-oriented incentives get reflected in efforts to complete the tasks assigned as well as possible, to choose the simplest way, to save time, and to achieve a sense of altruism or self-satisfaction.

It might seem that intergenerational learning interactions are directed mainly from older learning participants to the younger ones, in other words, that the older generation is teaching the younger one, but this is not the case as learning also occurs in the opposite direction. It is similarly true of incentives that one cannot say that one type is dominant with the older generation and vice versa, as learning situations may be initiated by both older and younger employees of the business.

## Organizational culture of family businesses

Intergenerational learning in the workplace, which we have described in terms of learning interactions, learning contents, and incentives, is now to be further described by defining the specific conditions of family businesses. To do this, we draw on the concept of organizational culture, namely organizational culture in family businesses, which shapes the conditions informing all three components of the model of intergenerational learning in companies.

The data allow us to identify two levels of organizational culture in family businesses: social and instrumental. The social level is linked to communication within the business, to interpersonal relations, and, more broadly, to the climate in the business. The values of the employees also play a role. The instrumental level is linked to the everyday administration and technical operation of the business.

### *The social level*

One factor essential to the social level of organizational culture is communication. Thanks to relations based on family membership, irrespective of the situation in the particular business, communication seems more open than in other (non-family) businesses, against which the respondents tended to pit themselves. Some of their accounts illustrate this: “*We talk about everything, discuss things, and that’s it. Nothing is a problem to communicate*” (Slávek) or “*That we communicate things simply as they are – that’s an advantage that a family business has. Not like in normal companies*” (Jindra). It is evident that open communication simplifies the operational processes in the business and creates extra opportunities for intergenerational learning interactions, as described by Alan: “*That’s for sure, you cannot ask the same question thirty times at school without making someone angry ... but here I can ask even thirty-five times and then I know ... [laughter].*” Open communication does bring advantages such as speeding up company processes, but the same openness can also potentially cause hurt when used negatively. Since that negativity concerns a family member, its transmission of the negative emotion into family life is not rare. Some respondents mentioned that the negative impact of excessively open communication gradually led them to set rules helping them to cope with similar situations: not talking over business problems with the family outside the business environment, separating job-related and personal issues, respecting the roles of family members in the business irrespective of their family roles.

One of the aspects supporting open communication is trust between staff and family members, something noted by Vilém: “*You can, of course, trust them more and ask them no matter what. With people who are your employees but no relation, it is sometimes more difficult to ask them about things they think you should know. But*

*with family members, such as with my granddaughter, I can talk in a completely different way, you could say, than a stranger.”* What makes family businesses what they are is, as the respondents expressed, this very trust they can build on, which is making company processes easier: *“Overall, the relationships within the family are very friendly, we do even leisure-time activities together, we have common interests, so that influences communication. But mainly there is trust, trust you won’t be deceived and trust that we have been given the responsibility from the start”* (Honza).

The specific feature of family businesses evident at first glance is the kinship relations in the workplace, which creates prerequisites for close relations connecting individual members of staff in the business. Jindra:

*Well, I think that this defines it, that the relation works like that, because it’s a family business, which means that we’re not dealing with issues common in other businesses ... strangers among strangers ... that we know one another well, which removes a lot of unnerving issues, so I guess it works harmoniously without us needing to tell one another many things.*

Close relationships thus also support open communication indirectly. Drawing on the specification of intergenerational relations proposed by Bengtson (2011), respondents in our sample of family businesses have relations he refers to as close-knit. This type of relation is characterized by positive mutual emotions, closeness, frequent contact and mutual help. Respondents’ accounts also indicate that they are aware that they need to give relations in the business attention so that the family works well even in the private sphere of its life, i.e. beyond the sphere of business activities. It is not just the business but the family which is at stake. In addition to cooperating on business, tasks, they have to cultivate relations to prevent conflicts spilling over into their private lives. Family businesses seem to pose much greater demands in this respect, even outside working hours.

Reliance on close family relations may also pose a threat to the expansion of the business in case the family relations are put above the rational specifications of job-related responsibilities of the employees (family members). In non-family businesses, employees are selected based on their abilities, skills, knowledge, etc.; the selection in family businesses is based on blood relations. Kinship relations may also hinder the careers of individual business employees, if they choose to work in the family business only to be loyal to their relations or when they artificially block their career development for the same reason.

Respondents tended to mention mutual help in connection with closeness of relations: *“I believe it is a great thing we always help one another; it is one of the advantages of the relations”* (Slávek). What is also evident is the respect paid to the founder of the business, stemming from his/her undeniable role of a founding father/mother and of a person who has the greatest experience

with operating the business. Thanks to these roles, the respect has to do with an effort to learn from the founding father rather than to do with a fear of him. This is irrespective of the fact that the founding father may not be an expert in a number of areas such as handling information technologies. Reports by respondents nevertheless show that the respect for the founder of the business or the general manager need not transmit into the private life of the family and vice versa. Respect in the family is won and based on other things.

*The instrumental level*

Open communication, trust, and close-knit relations among staff who are members of the same family provide for a less formal working environment. One of the number of specific indicators of this observation is the absence or low incidence of formal organizational-coordination mechanisms, such as meetings, supervision appointments, etc. These happen in family businesses rather spontaneously. This can be illustrated by an extract from the interview with Hynek: *“It all happens on the go, when I need something I just ask, it’s not that we would sit down and focus on something or ... It happens during other things.”* Interviewer: *“So you don’t plan to have, say, a meeting for instance every Monday?”* Hynek: *“Certainly not, we explain things to one another on the go.”* The absence of formal organizational-coordination mechanisms can, however, lead to some work processes being too spontaneous; opportunities for conflicts occur. Our findings in this respect are identical with those which emerged from research focused on the situation in family businesses.<sup>9</sup> People working in family businesses are aware that personal relations often overrule the systemic approach. The above-mentioned attributes of organizational culture in family businesses (open communication, trust, close-knit relations, mutual help and respect, less formal working environment) also cause a weak competition environment inside the business, i.e. among the staff who are members of the same family.

The individual components of intergenerational learning in family businesses and its organizational culture are summarized in Diagram 2.

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<sup>9</sup> Research undertaken by the Association of Medium and Small Businesses in CR, which was based on questioning 100 respondents representing family businesses over the phone.

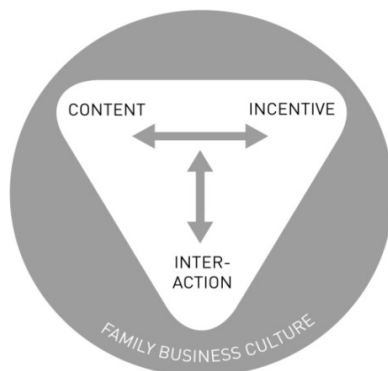


Diagram 2

*Intergenerational learning in family businesses*

### Discussion of results and conclusion

We would like to discuss and emphasize four findings in particular that were arrived at through our analysis of learning interactions in family businesses: *The model of learning interactions proposed by Illeris describes learning in family businesses in a useful way.*

How people learn can be described and analysed in various ways. We had tested a number of these ways prior to this research (Rabušicová, Kamanová, & Pevná, 2011), but this time we employed a theoretical model of learning not directly focused on intergenerational learning. We were inspired by a paper by our colleagues Brücknerová and Novotný (2015), who used the model by Illeris to analyse learning in teaching staff teams. Can the model be legitimately applied to other workplaces, such as family businesses? It can, because the typology of learning interactions differentiating overt and covert interactions and the five types of interactions (transmission, imitation, experience, perception, and participation) has proved to work with concepts useful in the analysis of learning in family businesses.

*The intergenerational dimension is evident but not omnipresent in learning situations.*

The differences commonly and repeatedly ascribed to individual generations (Ramsey, 2011) may, as has generally been known, pit two generations sharing one working space against each other. Beyond that, age diversity in the working environment may have a number of benefits; they were described, for instance, by Schlimbach (2010). This influence was clearly reflected in the contents transmitted in learning interactions in family businesses. It turned

out that the younger generation transmits mainly external contents while the older generation transmitted mainly internal contents. In the exchanges, as we observed them, truly intergenerational learning situations arise, helping the family business operation. Everybody benefits, as the appreciative comments by the respondents show: if a family business is to expand or at least remain in operation, it is dependent, among other things, on intergenerational transmission of external and internal contents. The fact that their transmission may generate certain conflict situations seems to be rather marginal in this context. As for the learning situations the incentives lead to, the message is less clear: intergenerational learning interactions are not directed, as one might expect, from older to younger persons but learning is initiated by people working for the business regardless of their age, position in the business, or generation. It cannot be said concerning learning incentives that some motivations prevail among the older generation or vice versa.

*Family businesses are a specific environment not only for learning.*

The specificity of family businesses is reflected in organizational culture. The typology by Goffee and Jones (in Lukášová et al., 2004) differentiating two dimensions, sociability and solidarity, is a tool which can be used. Sociability refers to the amount of friendship among members of the organization. If the degree of sociability in an organization is high, there are warm and caring relations among people in the organization, which is reflected in a high amount of social interaction and information sharing. Solidarity, on the other hand, refers to cohesion based on rational reasoning rather than emotions. This is to say that it is based on joint tasks, common interests, and shared goals which benefit all people involved. Consistent with this typology, the culture of the family businesses studied within our research can be characterized as one of togetherness and positive orientation. In businesses with this kind of culture, both these dimensions have high values and are well balanced: people in the organization have warm relations, they are deeply involved and loyal, communicate openly, and are open to new ideas. People's individuality is respected in the organization and their good performance is appreciated. Organizational culture is also manifest in the conditions in which learning can originate and in the focus of learning of the staff. In this context, our findings concerning the motivations for learning situations originating or being shaped are interesting: we recorded no explicit formulations of efforts to increase the profits of the business. All of the incentives that we recorded – whether at the individual or at the organizational level – concerned strengthening and expanding the business and the development of its staff, the family members. Family businesses are thus specific in not aiming at fast profits but at building something that can last and provide continuity for the present generation as well as future generations.

*The family and the family business are connected*

This connection manifests in at least two ways that we were able to identify among the data: organizational culture as a learning environment is very similar to family culture as far as the dimensions of relations, communication, cooperation, trust, and mutual help are concerned. The open communication in family businesses that the respondents described, however, may not bring only positive effects, especially in cases when some negative emotion gets transmitted from work to family life (and vice versa), so, as the respondents were aware, business-related and personal/family issues need to be separated. We already concluded as to family culture that if the above-mentioned attributes characterize a family, it has a pro-learning family culture (Rabušicová, Kamanová, & Pevná, 2011). The analogy with pro-learning organizational culture is evident. The same observation was formulated very similarly by Jimenéz et al. (2015), who pointed to the influence of family social capital on the social capital and performance of the business owned by the family. A second kind of interconnection is evident in accounts by those respondents who emphasized their wish not to disappoint others, cope with their role the best way possible, etc., adding that should this be otherwise, the fact could get negatively projected into their family relations and family climate. The family can thus also play a role by putting rather strong pressure on the staff, making up for the role of internal competition mechanisms or formal hierarchical structures.

What makes a family business a stable and successful one is the central goal of the owners (the founder generation) to pass it on rather than sell it. For that, they need to be sure that the person to whom it is passed on can manage it and has the necessary knowledge and skills and a certain set of values – in other words, is up to it, perhaps thanks to intergenerational learning.

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