

Basic Considerations for Effective Family Meetings

Family meetings have become a widely used tool in the growth and development of legacy families. When well-facilitated, family meetings can provide a ritual structure for both family learning and development. For instance, families can discuss emerging financial, relational, and generational transitions; learn and practice more effective communication and shared decision-making skills; resolve family conflicts; and develop strong family culture and shared values. .

We believe families with strong but flexible family culture have the highest opportunity for generational stewardship. Families with no shared identity disperse, and families with rigid culture can become brittle and break. Therefore, practices like family meetings, which offer opportunity to cultivate family culture, can be essential ingredients in the growth and maintenance of legacy families. Family meetings, as cultural rituals, offer families an opportunity to celebrate family and individual successes, acknowledge rites of passage, share collective experiences, learn more about one another, acknowledge challenges and ask for support, and much more. Therefore, family meetings, if well executed, can serve to both help the family grow and learn together (a growth structure), but also to support the well being of the family (a protective structure).

We have provided a brief outline of key guideposts for both effective preparation and effective delivery of family meetings. These suggests have been discovered by years of work with families, and through the essential writing of colleagues we respect such as Matt Wesley, James Hughes, Stacy Allred, Dennis Jaffe, Mary Duke, and Jim Grubman, amongst others.

Preparation

Family meetings should appeal to all participants, be prepared collaboratively, and have an agenda and clear objectives. Outside facilitation and thoughtful ground rules can create a safe environment for discussion and effective engagement. A few key considerations along these lines are as follows:

1. **Create Shared Buy-In:** Structure the meeting so that all invitees have something to look forward to. This could be as simple as inviting the least interested participants to select the location, and inviting them to plan family fun activities after the meeting. If members express hesitation, address these before beginning collaborative planning.
2. **Prepare Collaboratively:** The leading generation usually initiates family meetings, and should express their intention for the meeting. Invite feedback and make room for other members wishes in what may be addressed, learned, or celebrated during the meeting. Doing so will strengthen buy-in by truly making the meeting for the family, rather than certain members.
3. **Propose Clear Objectives and an Agenda:** Clear objectives help all members prepare for the meeting, and adjust expectations. Family meetings main objectives could range from relational focused topics, financial updates and changes (sale of assets, liquidity events, etc), meetings with trustees, and much more.
4. **Clarify Ground Rules for Engagement:** Initial invitations can highlight basic ground rules for discussion, including insistence that everyone's voice to be heard, centralizing an attitude of curiosity, avoiding blame and criticism, speaking in "I" statements, no interrupting, and more.

5. **Utilize an Outside Facilitator:** A professional facilitator (or team) can significantly improve the efficacy of the family meeting. Skilled facilitators can help understand misunderstandings, teach/demonstrate effective communication skills, and strengthen connections. Outsourcing facilitation also ensures that the leading generation can participate in the meeting, rather than run the meeting. Additionally, family leaders are inevitably involved in family entanglements, and their leadership of the meeting would impede openness of certain members, and progress generally.
6. **Determine Who Will Attend, Who Will Pay, and a Select a Neutral Location:** Selection of who participants is entirely up to the family, and the purpose of the meeting. Be thoughtful about who can, and who should attend, and what to communicate to those who are not invited. Decide who will pay, and support members who may have less financial flexibility, including paying for their travel, expenses, babysitters, and lost days of work. Choose a neutral location, which can be enjoyed by all. This could include a vacation home, an off-site location, or other options, but most importantly, consider everyone's experience.
7. **Invite the Participants:** We recommend sending a letter or email, highlighting the purpose of the meeting, your wish for their participation, the logistics and proposed agenda, and an invitation for collaborative planning.

These suggestions can help streamline inevitable potholes in the planning and structuring of the meeting. Qualified facilitators can help with the planning process, including planning calls with individuals or dyads to define what should be discussed presently, and what should be resolved another time, or in another context.

Delivery

Skilled guidance through well-designed family meetings provide the governance and relational structures required for effective conversations, decision-making, growth, and resolution. The structure of the family meeting can help create a container for meaningful family work. Some helpful guidelines include:

1. **Start with an Icebreaker:** Insight oriented games that invite curiosity, light disclosure, group creativity, and more can help the family discover one another, recognizing that while everyone may know each other deeply, we are always in a process of changing and becoming. It can also "grease the wheels" for open and honest discussion.
2. **Outline the Agenda and Timeline:** Doing so can help members prepare themselves and feel a sense of agency and control.
3. **Review Ground Rules for Effective Communication:** Outside facilitators can be especially helpful in establishing healthy rules for engagement. Guidelines such as: emphasize curiosity and openness, respectful listening requires no interruptions, use "I statements" to limit blame and criticisms, state feelings rather than critiquing others, focus on issues rather than personalities, and more. If a topic is devolving into conflict, take a break, and return to the conflict when members are more regulated (including another day).
4. **Integrate Family Culture:** Discuss mile markers, discoveries, transitions, new additions (engagements, babies, etc), tell family stories, have a Rising Gen member teach a lesson about something they have learned, have someone sing a song, show a painting, tell a story about a recent trip. Additional ideas include:
 - A. **Celebrate Mile Markers and Triumphs:** Name recent successes, triumphs, and mile markers that members have had. Find something to celebrate for everyone. New

hobbies, finishing a semester of school, new jobs, financial goals, and more, can be opportunities to acknowledge efforts and successes.

- B. **Utilize Family Storytelling to Cultivate Family Mythology:** Tell stories about ancestors, their triumphs and struggles, what their world looked like, and more. Family mythology can be an elegant way of communicating family values, legacy, and lessons, and ensures strong connections to family roots.
5. **Learning Component:** Modules that teach a new skill in communication, present a governance principle, a values activity, a personality assessment, and innumerable other options. Family office advisors could present a topic related to financial literacy, family members could teach on a relevant topic, or facilitators could teach and lead an activity.
6. **“The Main Dish”:** The purpose of the family meeting could be varied, but should be well prepared by the leading generation and the facilitator. This could include a discussion about stewardship, future roles and responsibilities in family decision making, values discussions, business decisions, trust and estate adjustments and more. Facilitators can help support fertile and expansive discussion between members about the relevant questions and “work” involved in the main topic area.
7. **Summarize the Meeting, Fortify Learning:** The facilitator can summarize the meeting, and lead a brief sharing activity to bring the work to a close, highlighting future work to revisit, and when the next intended meeting will occur. Summarizing resolutions, agreements, and conflicts that need additional work can help
8. **Closing Ritual:** Depending on family culture and traditions, a closing ritual could include anything from a prayer, to a playful game. The ritual should fit the family and resonate with the tone/feeling of the meeting. Some families develop traditions of how to finish, such as a story that gets told and retold, a song they sing, or a slideshow.
9. **Follow with Fun and Connection:** We recommend letting family members have some time apart after the meeting, but to follow up later that day, or the next day with light and enjoyable shared activities, sharing meals, games, exploration, and time together. This can help the family further bond and grow through shared meaning and proximity.

Though these rudiments of family meeting structure and facilitation can serve as guideposts for family meetings, they are designed to be adapted and individuated to differences in each family, according to their dynamics, goals, and objectives.

Over time, families participating in effective family meetings find that stronger family culture and traditions and healthier communication patterns can take hold. This enables deeper connections, the organic development of family traditions and rites of passage, and sustaining generational practices for effective family decision making and future stewardship.

We hope this document can help encourage your family - or the families you serve - to prepare for rich and engaging family meetings in the years to come!