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Navigating Family Dynamics: Tools for when Challenges Arise

Presented at Southern CA Grantmakers Annual Conference

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Break-Out Session Intentions – generated by participants:

I. LEARNING and ENGAGEMENT:

Helpful tools for engaging/dealing with family members

Useful strategies

Ways to re-engaged family members

Make family foundation meetings better

Ways to bring up issues without causing people to be uncomfortable

Ways to incorporate consultants

II. DEALING WITH CHALLENGES

Bridging hurt

Dealing with apathy and disrespect

Better communication between two generations with different styles, values, etc.

Highly disruptive intergenerational issues/faith

Diffusing (and inviting) conflict

Differences politically and religiously

III. PLANNING STRATEGIES FOR GRANT-MAKING; SUCCESSION PLANNING –

This request was the only one not specifically addressed during our brief time together.

Please refer to the resource list handed out at the end of the session.

In particular, we recommend:

Inspired Philanthropy by Tracy Gary as a great resource for planning strategies for Grantmaking.

In terms of Succession Planning, the two books we recommend are:

Philanthropy, Heirs, and Values

and

Preparing Heirs

both by Roy Williams and Vic Preisser

Learning, Engagement and Dealing with Challenges: Tools Explored during Break Out Session:

1. Power of appreciation and what happens when it is missed – both in the giving and receiving of acknowledgements.

Demonstrated with simple exercise of having people stand and share something about themselves and then saying thank you to them after they spoke.

Remember – a person is taking a risk when they choose to speak what matters to them in front of other people.

2. Granting Legitimacy to each other's perspectives.

Importance of slowing down and reflecting back what the speaker is saying.

If someone is over talking a point, or repeating themselves, or returning to the same issue – they are not having the experience of being heard.

Experienced through exercise of having someone speak for a given amount of time about something they cared about and then, each person at the table listened and shared one thing they heard that mattered to the speaker (and it may not have been something explicitly stated).

One of the greatest gifts we can give to another human being is showing them that they matter and have been heard and understood.

3. Engaging the Body

When you get the sense that people are not engaged, get their bodies moving. This is particularly helpful when there is resignation and resentment in the space.

There are simple, easy ways to include the body in the meetings –

Inviting everyone to stand and stretch

Include some BrainGym exercises – we did “cross crawl” where our opposite arms and legs connected in front and behind the body; and we did “cook’s hook-up” by crossing wrists, intertwining fingers, and bringing our hands to our chests, then crossing ankles and putting tongues on the roof of the mouth (with and without reciting the alphabet).

Mix things up by tossing a ball, a stuffie, a water balloon (thanks Lisa!), or even wadded up paper, when someone wants to speak; then the speaker can toss it to the next person who speaks.

You’d be amazed at what tossing a ball or stuffie to an old patriarch can do to liven things up and get things to shift newly.

4. Introduce Play into Meetings

By incorporating something a bit different, yet familiar, you engage people’s curiosity and willingness to participate and even make mistakes.

We played with this by:

a. Crumpling up our specific goals and intentions and tossing them into a tub – involving everyone at the table, and having to work together in order to be successful.

b. Having playing cards on each table as people entered – the cards invited touch, play, and a mood of discovery (I chose cards that had interesting pictures on them as well).

The cards allowed for selection to be random as opposed to preferential or “how it always is” – so the speaker chose their own card (they were not “dealt”). In families especially,

people can have the feeling of being “dealt” their particular role. Having a new approach allows for a different presence and way of being in the meetings.

c. Use crayons instead of pens and have butcher paper on the table for doodling ideas and notes – engaging a different, playful mood and also creativity into your discussions.

If it does not feel safe to take a risk to introduce play, then a first step may be to have a conversation about play and games from each person’s perspective, to learn more about each other and speculate about what sorts of fun games/memories might be easily utilized in the next meeting. Then, you can rotate which family member will take on bringing something fun to the next meeting to keep things interesting and keep the curiosity going.

Play is a great way to shift the mood.

Remember – the right conversation in the wrong mood is the wrong conversation.

5. Mapping the Family

The genogram is a powerful tool you can use to get a broader perspective relative to the dynamics at play within the family system. This map of the family can show patterns, trends, and backgrounds in a snap-shot format that brings into awareness that there are other things at play in the meetings – it’s not just a personality thing.

NOTE: While this tool can be very helpful in understanding the larger perspective, there is also much that can be done with a professional who knows how to asks questions to draw out the underlying issues and nuances (like how Diane Sawyer interviewed the Binghamts to get at their painful histories). An experienced interviewer can make important connections about the various dynamics and what else may be contributing to the behaviors being witnessed in family interactions.

To learn more about genograms, refer to the resource list for our favorite book on the The Genogram Journey: Reconnecting with Your Family by Monica McGoldrick

6. Comfort Zone

We often avoid taking risks or broaching difficult topics because of a desire to avoid feeling discomfort. Anything we do outside of our comfort zone causes us to feel discomfort. What happens with avoidance of discomfort is a decrease in learning and ones willingness to make mistakes (which, unfortunately, is the only way to learn!). We also often mistake the “learning zone” for the “terror zone”, where we misinterpret discomfort for fear and anxiety. If the mood can be shifted to one of discovery and openness, then learning is much more likely.

What shuts down learning and risk-taking is fear – creating a space where it is safe to make mistakes and take risks will make learning more fluid and enjoyable – and possible. The less we move out of our comfort zone and what we are certain about, the more rigid that barrier becomes and the more difficult it is to step out and learn something new.

7. Navigating Differences

When you encounter strongly held differences in beliefs, be they political or religious or whatever, there are a few key distinctions you can incorporate to come into alignment around your shared purpose.

- a. Give each person a chance to speak about what matters to them about a particular topic, for a specific amount of time, and with the expressed desire to listen, and to share with them what you see that matters most to them about that topic. The key is for each person to speak and have the experience of being heard. This is not about agreement, not about winning over others to a particular position or point of view, not even about liking what they say or not. This is about granting legitimacy to what matters to each other. AND this is a great opportunity for someone to collect the core, underlying values that are expressed by each person.
- b. Explore the core values of all family members and see where there is alignment – again, you’re not looking for agreement – where everyone can stand in alignment that the values stated are ones that they share as well. You’re looking for overlap and commonality. The outliers exist as well, and can continue to be honored individually, not collectively.
- c. Review the purpose of the family’s philanthropic giving and goals. Look at what values you all share are also in alignment with the foundation’s mission.

This process can be done with a venn diagram with overlapping circles, looking for what’s in the common area among all the circles.

8. Incorporating Consultants

When repeated attempts have been made to shift persistent challenges related to past hurts, disrespect and apathy, this is a good time to bring in a consultant. It is better to do so sooner rather than later, as unaddressed issues have a tendency to fester and grow and can cause greater damage the longer they go unattended.

When considering bringing in a consultant, we recommend you do your research – find out their background and experience in working with family breakdowns and dynamics; ask other families or foundation staff members what consultants they have used when issues have warranted outside help and what were the results; and Test drive them! Invite three prospective consultants to demonstrate with the entire family who they are and how they work and engage all the family members.

Give all family members a chance to do their research and present possible options to the rest of the family and why they believe they are worth checking out. If it is clear that the power lies with one or two members of the family, approach them first with the idea, and see what THEY see as needed and valuable first. If they are resistant to the idea, seek to find out what their concerns are and why they believe it would not be valuable (time? Money? Opening up a can of worms/pandora’s box? ...). If they are unwilling to move forward, and the rest of the family thinks it is a good idea, then, those family members can put together a formal proposal and demonstrate their desire, intention, and level of seriousness regarding their collective desire to bring in outside guidance. The consultants you interview may also have recommendations on how best to proceed once they get a sense for the current family dynamics that are bringing the request forward at that time.

9. Physical Space

To make the most of your meetings, pay attention to the space you are using.

Tips to remember:

Have a high ceiling if possible

Have windows offering natural light, and perhaps even fresh air

Have easy access to the outdoors – balcony, patio

As much as possible, have meetings in a neutral location. Subtle power-differentials are at play when you meet at a parent's home or office. Better to have it at a location that is not run/owned by any family member in particular.