

Keeping the Family Connected in Self-Isolation

Best practices for retooling the family meeting in a remote world.

BY AMY HART CLYNE

What does a family meeting look like when family members can't actually meet? In today's world of social distancing, travel bans and shelter-in-place protocols, many families are being forced to rethink family meetings. In addition to the obvious logistical obstacles, there's a deeper emotional challenge at play for many families. At a time when the COVID-19 pandemic is creating the greatest uncertainty and upheaval in recent memory, families are being forced to stay physically apart. Given these challenges, family communication is more important than ever. Today's families are feeling the stress on their wealth structures and their current decision-making and governance structures, as well as the imperative to validate the family's purpose and mission for their wealth.

To address these challenges, many families are embracing virtual family gatherings through video conferencing tools and other technologies. But getting all family members engaged, especially in a new format, remains daunting for family leaders. Each individual's own comfort level will directly influence their ability to engage in meaningful dialogue. For family leaders, achieving immediate buy-in across households and generations is no small task.

From our work with families, we've identified the following best practices in coordinating and conducting a virtual family meeting.

1. Establish a clear meeting purpose.

The issue: Now more than ever, it's important for each meeting to have an effective agenda.

We know from experience that in hosting family meetings, logistics often overshadow the agenda. In fact, agenda items are often carried over from meeting to meeting with little thought about the true intent or goals of the session. In virtual meetings, the topics, order, content and flow are even more important. An effective agenda will consider both emotional and intellectual mindsets and priorities. This year especially, different generations will have significantly different concerns and anxieties when it comes to the coronavirus and its ultimate impact on their health and their futures. Older family members may have greater concerns about their health, while younger family members may be worried about the long-term financial impact of already having lived through two economic crises. All family members should have a chance to



share what's on their minds. Make sure the meeting is structured to include discussions on how the coronavirus is affecting the family's wealth as well as any potential silver linings.

The logistics: Get input and buy-in on the agenda ahead of time.

- Identify a meeting leader. Whether it be the matriarch or patriarch, the family council chair or anyone who volunteers, someone should be the primary meeting facilitator.

- Have the leader request agenda items. Meeting leaders can survey family members via email on the topics they want to cover. Collaboration software such as Microsoft Office 365 or Google Docs can be used to give family members a chance to suggest changes to the agenda before the meeting takes place.

Commit to taking minutes and following up on action items. Rotate the leader. Conclude the meeting with a fun activity or happy hour, or ask a question that would be fun for all to answer.

Case study: One family we work with traditionally meets every May at their lake house. To drum up engagement for virtual family meetings ahead of time, they asked the cousins group to build the agenda. Each branch had a cousin check in with their nuclear family for topics. The primary purpose for gathering was to simply connect and think “positively and proactively” about something. Conversations about investments were prohibited at these meetings. The family chose to discuss their grant making plan given the pandemic. The eldest cousin drove the agenda, wrote the minutes and shared them with the family and the foundation executive director. They closed the meeting by asking participants to share one thing they're grateful for.

2. Create a safe virtual space in uncharted waters.

The issue: Technology-based gatherings are new and even daunting!

It can be a challenge to foster open and meaningful exchanges when family members are separated by screens. For many, this is uncharted and untrusted territory. Leaders can help set the tone of the meeting by sharing some of their own anxieties around virtual meetings as well as their own struggles with the coronavirus. When leaders share their feelings, it helps other family members feel more comfortable and connected. In other

cases, using a trusted facilitator to help guide the meeting can ease the transition to a new format.

The logistics: If you have family members who still don't know how to mute or unmute their audio or have trouble positioning their screen so their faces are visible, arrange a one-on-one practice session to help them navigate the videoconferencing technology. Another area of discomfort to address is cybersecurity concerns. Make sure you have security protocols in place and inform your family members of these precautions to ease their concerns about privacy and confidentiality. Most technology options offer tips and user support functions.

Case study: One family we work with has started every meeting with an exercise known as “Roses and Thorns,” and they continue to do so virtually. Each family member shares one positive thing and one negative thing that's happened since the last meeting. It creates a powerful framework where family members are all contributing and engaged right from the start and feel comfortable that this new meeting space can be safe and offer comfort during difficult times. Another family starts their gathering by asking, “What is something in the room you're in that gives you joy?” It alleviates the awkward nature of meeting over video by enabling family members to “visit” each other's homes.

3. Manage family dynamics before, during and after the meeting.

The issue: The meeting content is one thing, how to converse with ease and harmony is another.

Even though the format is different, all the best practices around productive family meetings still apply in virtual meetings. Too often, family meetings fail because the focus is limited to the few hours of group interactions. Much of the real work in managing the family dynamics happens before and after the actual meeting. Consider the family meeting as an experience of touchpoints. What do family members get in advance? How should they prepare? Where are they asked to share input? What will they take away from the meeting? Are they responsible for following up? Each of these touchpoints is an opportunity to build buy-in and engagement for the meeting — and the new format. Is there is a family champion or trusted adviser who can address family dynamics ahead of the call?

The logistics: Many video conferencing tools have features that can enhance interactions and create more equitable exchanges between family members. For example, some allow for leaders to conduct polls. Others allow participants to post reactions or comments to what's being said without disrupting the flow of the discussion. Another useful feature, breakout sessions, enables meeting participants to split into smaller groups to discuss a specific topic and then return to the larger group. Finally, virtual meetings can be recorded and shared after the fact. Transcriptions can be mailed to participants who would benefit from a tangible output.

Case study: One family we work with conducts "prep calls" with key family members ahead of each meeting to ensure potential conflicts or disagreements are discussed ahead of time. Another family asks each branch of the family to gather questions from members of their branch so all feel that their voice will be heard. Still another tasked the cousins to meet in their

"breakout room" to discuss an issue and then come back to share after the allotted time.

Future possibilities

Virtual gatherings are just one aspect of a whole new reality facing families during the COVID-19 pandemic. Yet even in this new and challenging family meeting structure, there is opportunity. As you formalize procedures, virtual family meetings can serve as an ongoing connection point and family tool even when the world returns to a more normal state.

A key challenge in family communication has long been the difficulty in gathering all members together given busy lives. Perhaps building this new muscle, one that doesn't involve physically moving across the country or even the world, will be a silver lining for those families who find logistics and travel to be a significant deterrent to building family cohesion and harmony. **FB**

Amy Hart Clyne is chief knowledge and learning officer at Pitcairn (www.pitcairn.com).