



*Family*

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# Effective Family Meetings

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# Dispute Resolution Continuum

- ***Avoidance***
  - Decision left to chance
- ***Facilitation, Negotiation, Mediation***
  - Decision by the parties
- ***Arbitration, Litigation***
  - Decision by higher authority
- ***Unilateral Power Play***
  - Decision by force

# Building Intra-Family Consensus

Important steps in reaching consensus:

- A. Agreement to meet and build consensus;
- B. Professional facilitator
- C. Confidential interviews
- D. Series of “inclusive” intra-family meetings; closed to “outsiders” except as advisors/professionals are needed

# Building Intra-Family Consensus (cont.)

## E. Effective intra-family meetings

1. Based on consensus decision making process
2. Established ground rules
3. Encourage “silent ones” to speak and “vocal ones” to listen

# Building Intra-Family Consensus (cont.)

4. Work with different ways that people learn and listen effectively

a. Visual

b. kinesthetic

c. auditory

# Building Intra-Family Consensus (cont.)

## E. Effective intra-family meetings (cont.)

5. Provide safe space for intra-family members to vent “old emotional baggage”
6. Creative brainstorming
7. Memos of meetings

# Building Intra-Family Consensus (cont.)

F. Homework and implementation of decisions

G. Mediation, facilitation, or conflict resolution

training for advisors creates participants who can be helpful in the consensus building process

# Ground Rules / Guidelines

- Confidentiality (if people share in the group)
- Respect
  - One person speaks at a time; no interrupting
  - Address behaviors, not personalities; no put-downs
  - Set your own boundaries and respect the boundaries of others
  - Help us stay on time
- Treat one another respectfully



# Ground Rules / Guidelines (cont.)

- Speak one at a time; no interrupting or side conversations
- Take responsibility for the process
- Speak up if something is not working for you
- Anyone can call a break if needed
- Stay until the process is complete
- Speak from your perspective and for yourself, not others; use I-Statements

# Ground Rules / Guidelines (cont.)

- No blaming, name calling, shouting, finger pointing
- Confidentiality is crucial in some cases
  - (Define who to speak with and who not; what to say to community or barbershop)
- No “ru-barbs”
  - You don’t want any barbs (comments) you’ll rue (or regret)
  - i.e. don’t bring up the past unless it pertains to the present
- Use active listening skills

# Best Practices for Family Farm & Ranch Meetings

- Teach and develop communication skills
- Learn about governance
- Develop leadership skills
- Mentor the next generation
- Share power with the next generation
- Encourage lifelong learning in the family

# Best Practices for Family Farm & Ranch Meetings (cont.)

- Provide opportunity for open, forthright discussions which improve family harmony in the long run
- Share power with young children by starting meetings early. Let young ones rotate the roles of responsibility for “fun” activities

# Best Practices for Family Farm & Ranch Meetings (cont.)

- Work initially with a professional facilitator. With training, family members can take over and rotate the role of facilitator
- Practice facilitation skills

# Topics for Family Meetings

**Farm or Ranch Succession Plan:** Succession is most successful when all of the family members are involved in the process. Successful family succession occurs when the family works together to share responsibilities and power. Share your succession plan with your family. It is important that your succession plan not be a surprise to your family.

# Topics for Family Meetings (cont.)

**Estate planning:** This may be similar to your farm or ranch succession plan. It is important that your estate plan not be a surprise to your family. Share your estate plan with your family.

**Investing:** You can learn together about ways to invest.

# Topics for Family Meetings (cont.)

**Communication skills** are crucial to continuing family harmony and can be taught by a professional at your family meeting.

**Valuing all of the family's capital:** human, intellectual, social & financial.



# Levels of Agreement

**1. Strongly support**

I give an unqualified “yes” to the proposal.

**2. Support**

I find the proposal acceptable.

**3. Willing to go along with**

I can live with the proposal although I’m not particularly enthusiastic about it.

# Levels of Agreement (cont.)

## 4. **Want to be heard**

I do not agree with the proposal and need to register my views about it. However, I do not choose to block the proposal. I am willing to support the decision, if adopted by the group.

## 5. **Unwilling to support**

I do not agree with the proposal and feel the need to stand in the way of this decision being accepted.

## 6. **Call for further discussion**

I feel that there is no clear sense of unity in the group. We need to do more work before agreement can be reached.

# Sample operating instructions

- Participants use the appropriate number of raised fingers to indicate their level of support for a proposal.
- The group may want to hear from anyone voting a “4,” “5,” or “6” to find out if that participant’s concerns can be addressed by a some - what modified or refined proposal.
- After hearing from any initial “non-supporters,” the group may, depending on its decision-making standard, still permit itself to take action if a general consensus (80-90% agreement) exists.