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# HELPING FAMILIES CREATE A POSITIVELY ATTRACTIVE ENVIRONMENT

Throwing A Better Party

AUTHOR

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A common aspiration of families everywhere is the desire to maintain and deepen relationships as family members grow, mature, and move apart. This is a goal that almost all of us can relate to, but it is also difficult to attain, especially as a family expands via marriages, partnerships, births, and adoptions.

Behind this goal lies an often unidentified yet key component to achieving long-term family cohesion. A component that, when developed with intentionality, can play a significant role in attracting current and future family members to be a part of something bigger than just themselves. This component is the development of a ‘positively attractive environment.’

## WHAT IS A POSITIVELY ATTRACTIVE ENVIRONMENT?

Think of a positively attractive environment as a fabulous party that you always *want* to attend. You choose to be there (it is not forced), and, at this party, you are supported, welcomed, and even loved. It’s a place where you can be *yourself* and fully accepted by the group in its entirety. You just *belong*.

The Merriam-Webster dictionary defines the three words that make up a positively attractive environment as follows.<sup>2</sup>

### **Positive:**

- having a good effect: favorable
- marked by optimism

### **Attractive:**

- arousing interest or pleasure – charming like an attractive smile
- appealing – an attractive offer
- having or relating to the power to attract – attractive forces between molecules

### **Environment:**

- the circumstances, objects, or conditions by which one is surrounded
- the aggregate of social and cultural conditions that influence the life of an individual or community

One can extract from these meanings that a positively attractive environment is a special place where the atmosphere is welcoming - you can come as you are and be completely seen, heard, and accepted.

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<sup>2</sup> [Merriam Webster](#). Excerpts of full definitions are represented.

In the family context, a positively attractive environment represents the magnetic culture of the family. It is something deeply rooted that attracts members to be a ‘part of.’

So, how do we get the party started?

## IT ALL STARTS WITH CHANGE...

Before we can start the party, let’s acknowledge that a family will never fully achieve a positively attractive environment if they are not willing to put in some hard work on an individual and a systems level.<sup>3</sup> This work takes a lot of intentionality, which translates to dedicating a significant portion of time in developing self-awareness and in learning how to self-manage within a system loaded with potential triggers.<sup>4</sup> Having a family member who is willing to serve as an advocate to champion family change can be a huge help. It also requires time to create social change within the system itself. This work is best navigated by a combination of individual and systems coaching for a variety of reasons. To illustrate, when a person shifts behavior and it is felt in the system, it encourages others to change as well. Essentially, there is a ripple effect that can lead to a cascade of changes within the broader system.

*“If you want to create social change, you have to throw a better party.” -Rick Ingrassi*

Social change refers to the alteration of a society which may include changes in social institutions/organizations, social behaviors, or social relations. Social development refers to how people develop emotional and social skills across their lives.

Let’s define a social system (a family) as a set of interdependent entities with a common purpose or identity. *Interdependent* as members of the family rely on each other. *Entities* referring to the fact that most human systems consist of two or more people. The *common purpose or identity* is a part of the boundary conditions that a family system has set. Elements of common purpose or identity as it relates to boundary conditions might include shared goals and values, cultural or religious identity, roles and responsibilities, stories and idioms, conflict resolution, or a sense of belonging. It’s important to note that not all families have a singular, well-defined common purpose or identity. Some families may have multiple or evolving identities and purposes, which can influence the family’s dynamics in different ways.

Just like organizations are living systems, so are families. A family is an organization with complex behaviors and relations between its members. These behaviors and relationships take form, evolve, and die.

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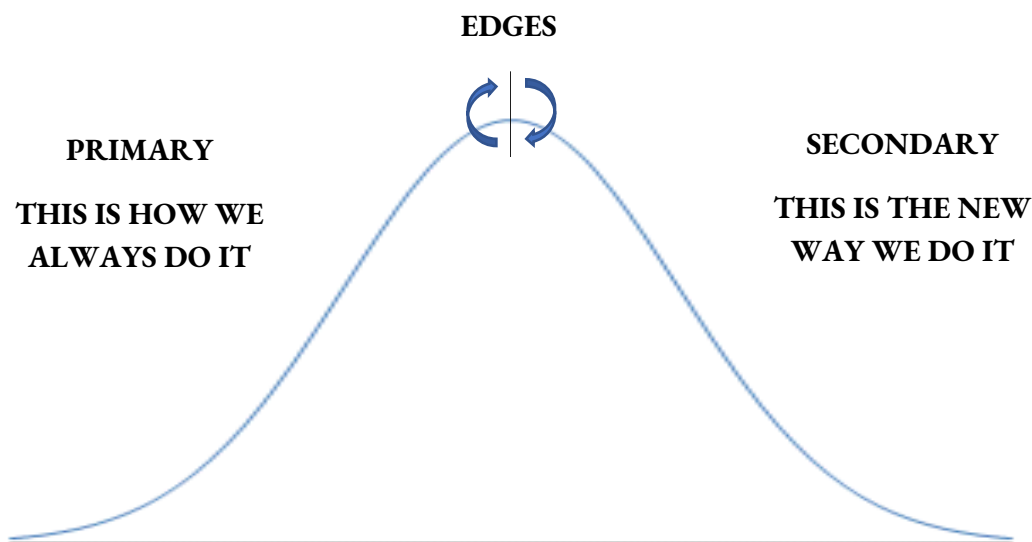
<sup>3</sup> In the context of this chapter, a system is defined as two or more individuals. A family system is comprised of all members of the family.

<sup>4</sup> Triggers being anything that causes a person to move from a state of response to one of reactivity.

How we react and move through these moments of change as individuals and as a family can have a major impact on the positively attractive environment we so desperately desire to create.

Take for example a client who would like to move bill paying off one partner's plate (let's call him John) to the other partner's plate (let's call her Sarah). Now, John and Sarah agree that this is what they want to do - there is no argument there. However, this is not their first attempt to do so, and each previous effort has failed. Why?

The pattern for this couple historically has been that 'John pays the bills,' representing their primary perspective of 'this is how we always do it.'<sup>5</sup> They now want to shift to a secondary perspective of 'Sarah pays the bills,' representing 'this is the new way we do it.' To get from the primary to the secondary, there are likely multiple 'edges' that each person will likely need to traverse and smooth.



To cross into the secondary successfully, it helps to slow down. Time is needed to uncover what the edges are for each person so that self-awareness and systems awareness can be created. Time is necessary for issues to be thoughtfully processed. If done well, the result is a new experience for John and Sarah's partnership, as well as their broader family system.

In exploring edges, John reveals an edge around trust. He has trusted Sarah to pay the bills in the past, but sometimes they were not paid on time, which resulted in a decrease in John's credit score. Moreover, Sarah has an edge around taking on the bills due to past experiences where she has felt criticized for using her own system to pay the bills. Neither John nor Sarah have intentionally named these edges to one another; rather,

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<sup>5</sup> Several concepts presented in this paper come directly from Organization and Relationship Systems Coaching (ORSC™), a training and certification program offered through CRR Global. ORSC™ is a robust coaching model centered around Relationship Systems Intelligence.™ ORSC™ is based on Systems Theory, Process Work, Family Systems Therapy, Alternative Dispute Resolution, Quantum Physics, Co-Active Coaching™, and more. ORSC™ tools and skills are directly applicable to family systems coaching.

feelings are swept under the rug and they ‘power on.’<sup>6</sup> This repeated pattern of thoughts, emotions, and behaviors represents a cycle of anxiety that can overpower thoughtful response. So instead of crossing-over to the secondary position, the couple remains in a state of conflict, which will likely spread into the family system as well.

Think about the ramifications of this to their relationship. Hidden fears and the absence of clear and honest communications is a recipe for failure. Neither is verbalizing emotions and needs. Now think of the potential ramifications to their family system. What could it potentially do to the family’s culture? Would it model a successful financial partnership for their daughters? Would it encourage their girls to be financially independent? What does it say about healthy communication? Would it model how a family can work through change or conflict?

Systems coaching can provide a framework for helping people name what is really going on, understand it, and normalize it. It can support a system’s ability to change ingrained patterns and behaviors.

Back to the positively attractive environment (that the family/that John and Sarah are wanting to create together,) while this is a simple example, these types of relational issues pop up all the time, and even the smallest microaggressions<sup>7</sup> can reverberate throughout a family.<sup>8</sup> It doesn’t sound like a party anyone would want to attend, but rather, one to not RSVP for.

## FOUNDATIONAL COMPONENTS OF CREATING A POSITIVELY ATTRACTIVE ENVIRONMENT

Next, to throw a better party, the family needs to learn how to be together in new and different ways before they gather. We touched on social change previously, so it may not surprise you that established familial social systems are a big part of the why.

All families have an existing social system that defines who is ‘in’ and who is ‘out.’ Take the common example of a multi-generational family with an operating business. Some family members are ‘in,’ meaning they may run the company, make the decisions, work together regularly, have a familiarity with one another, have established protocols and boundaries, etc. Some family members are ‘out,’ meaning that they

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<sup>6</sup> It is also possible to not be conscious of edges or have a good understanding of what is really going on. In addition, personality or communication styles may interfere with the ability to evolve *even with awareness*.

<sup>7</sup> Microaggressions are subtle, often unintentional, and brief everyday behaviors, comments, or environmental cues that communicate negative or derogatory messages to individuals based on their perceived or actual membership in a group. While they can be subtle and not immediately apparent to the person delivering them, they can have a significant impact on the well-being and sense of belonging of the recipient.

<sup>8</sup> According to research conducted by The Gottman Institute, 69% of problems are perpetual, meaning they cannot be solved. Perpetual problems are problems that center on either fundamental differences in personalities, or fundamental differences in lifestyle needs. Systems coaching can help to bring alignment (not necessarily agreement) when perpetual problems surface.

are not a ‘part of’ how things are done and most likely do not have a similar level of familiarity with each other or those that are ‘in.’

What would happen if we threw a family with such a social system into a room and expected them to suddenly make joint decisions? How well would it go? Who would play what role? How does the dynamic shift or need to shift? Would everyone feel safe speaking up?

Unfortunately, this type of dynamic plays out in numerous families in various situations, always ending in lack of honest agreement and disappointing results.

Take for example a client that had the best intentions in bringing their adult children into the inner circle by sharing their estate plan. They attempted not once, but twice, to have a discussion. Each time, it ended damaging their relationships instead of bringing them closer. It’s no wonder! They entered uncharted territory without a guide or a map.

While there are many variables at play here, two missing foundational components have consistently jumped out in analyzing these failed, but well-intentioned attempts.

## 1. Communication challenges

Establishing healthy communications patterns early on is often overlooked entirely. Three noticeable challenges include:

### *a. Not signaling a switch in lanes*

Family systems theory demonstrates that there are certain ways we operate and interact in families.<sup>9</sup> So, when someone in a family starts to act or interact differently, it can sound an alarm! What’s going on? What’s the intent? This isn’t normal, so I am going to <insert your response: flight/flight/freeze...>

Back to our example, signaling a shift in lanes might be as simple as calling it out. ‘Hey kids, we would like to have an important conversation with you about our estate plan. We realize that we have never interacted like this as a family before, so we want to acknowledge that it is new for all of us, and we invite your input on how to best talk about things as a family.’

### *b. Communicating on a one-way street*

It’s simple – if you feel someone is talking at you, rather than with you, most people will disengage. This often happens in families where there is a voice or two louder than the others.

In addition, for families that haven’t worked together much, taking the time to undergo some sort of communications or personality assessment can be enormously helpful. These can play a significant role in building self-awareness and self-management, plus they offer people

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<sup>9</sup> Gilbert, Roberta M. (2021). *The Eight Concepts of Bowen Theory*. Coppell, TX: Leading Systems Press.

strategies in how to adapt their personal style to fit the needs of others, facilitating more effective communication (a two-way street.)

*c. Not having a roadmap*

The lack of effective communication in families can lead to various problems and challenges. Communication is the foundation of healthy relationships and plays a crucial role in maintaining family unity. When communication breaks down or is lacking within a family, it can result in negative consequences such as misunderstandings, conflict, isolation, lack of trust, emotional issues, poor problem-solving, unmet needs, strained parent-child relations, or ineffective boundaries.

To address these issues, it is essential that families have a roadmap for what, when, how, and to whom the family will communicate. This roadmap should also define who initiates different types of communications. If it's an option, have a member of the family's staff function as its chief communicator. This is especially helpful when dynamics are particularly challenging. Keep in mind that improving communication within a family is an ongoing process, and it requires effort and commitment from everyone.

## 2. Operating challenges

To start working together differently, families need not only acknowledge the shift in lanes, but they must also paint some lines by co-creating new agreements.

*d. Designed Family Alliance<sup>10</sup> (DFA)*

Think of a DFA as a co-created set of ground rules and norms that a family agrees to abide by. It sets the stage for how a family wants to *be* and *not be* together.

The purpose of a DFA is to consciously and intentionally create a safe space that sets behavioral norms.<sup>11</sup> It can also reveal needs or issues that can be addressed in its design. It answers the question: 'What would help our family to flourish?' Another purpose is to create shared responsibility by asking family members: 'For what can you be counted on?'

DFAs can include simple things like 'use active listening,' all the way up to more complex topics like 'what we are allowed to share with others when we leave the room.' Each family will develop its own unique DFA that should be revisited and updated as needed.

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<sup>10</sup> The terminology 'Designed Family Alliance' is an evolution of the term 'Designed Team Alliance,' a key component of ORSC™ training and certification.

<sup>11</sup> A safe space can be defined in many ways. For the purposes of this paper, it means a psychologically safe place where family members are valued for who they are and the voice that they uniquely bring to the table. It also represents a place where vulnerability is encouraged, and constructive dialogue ensues.

e. *What to do if things get difficult...*

Think of this as a sub-component of the DFA that addresses what the family will do when a disagreement or conflict emerges in a meeting.<sup>12</sup> This co-created agreement is best designed when the system is calm, and because it is collaboratively developed and agreed to, it will be a welcome place upon which to lean when communications go awry.

This agreement can be thought of as a:

1. way to handle escalated situations in the moment,
2. set of covenants outlining how to behave, and/or
3. provision for what to do if an escalated situation cannot be resolved immediately.

The agreement might cover aspects such as how to detect the presence of cognitive distortions before pursuing a dialogue, how to use active listening and ‘I’ statements, or how to avoid blame and accusations. The covenants might state what to do if a discussion gets heated by normalizing that it is ok to ask for a meeting break or do some deep breathing, etc. The provision may contain a process that calls for a cooling-off period before returning to the matter at hand.

## WHAT MAKES AN ENVIRONMENT POSITIVELY ATTRACTIVE?

Once a family develops *and* practices the above fundamentals, it’s time to determine how to make the party magnetically attractive.<sup>13</sup>

The most powerful ingredient in helping families create a positively attractive environment is discovering and articulating the family’s ‘WHY.’ The ‘WHY’ gets to the heart and spirit of a family...to its culture. More specifically, the ‘WHY’ represents the feeling that a family exudes when its members gather. It turns all of the elements that make a family unique into an emotional state that calls its members home. Compare it to the scent of your favorite foods wafting through the air, drawing you into a warm hug. It is something deeply rooted that attracts its’ members to be a ‘part of.’ The ‘WHY’ answers the questions ‘why should I pay attention to this?’ and ‘what will it feel like to be a part of the family system?’

Then comes the ‘WHAT’ of the family. How do you define flourishing within a family? What elements are needed for a family to flourish? Perhaps flourishing means having a place where all voices are needed and valued, members feel seen and heard, vulnerability abounds, generative dialogue exists, and family

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<sup>12</sup> Note that this sub-component of the DFA is not a family conflict management agreement or process. It is merely an agreement about how things will be handled in the room when there is a disagreement or trigger. Most families will also need an effective set of guidelines for conflict management including both principles and processes. For more information, refer to: Atkins, Wilson, and Hayes (2019). *Prosocial: Using Evolutionary Science to Build Productive, Equitable, and Collaborative Groups*. Oakland, CA: Context Press.

<sup>13</sup> Fundamentals being the initial co-creation of healthy communication agreements and ground rules and norms that foster a safe space. These fundamentals lay the foundation for how the family will start to work together in new ways.



members are at ease in even having the more difficult conversations. The ‘WHAT’ answers what family members can expect to receive and give.

Together, the ‘WHY’ and the ‘WHAT’ answer the question ‘why would I give up some of my personal freedom to be a part of something bigger than myself?’

So, ‘HOW’ can families get there?

First, it’s important to note that the only group of people who can design the positively attractive environment are the family members. If designed by an advisor, coach, or consultant, it will fail. After all, how could anyone else do it without the experience of being a family member, knowing its rich history, and constantly navigating its terrain?

Questions to consider: What is the history of the family? What is unique or special about the family? What needs to be honored? What does it mean to be a <insert family last name>?

Other questions should focus on the family’s aspired future. Who do we want to be? How do we want to feel when we gather? What would make a future family member want to join us? What unites us as a group? What are we grateful for?

So, what specifically creates each family’s positively attractive environment varies. Facilitators may wish to consider some of the below suggestions in helping a family in the design process.

## 1. Educate the family on the difference between belonging and othering

Have the family discuss what belonging means to them. What does it feel like? What does it not feel like? Have them incorporate how they want to belong together as a group in their positively attractive environment.

“Belonging is being accepted and invited to participate; being a part of something and having the opportunity to show up as yourself. More than that, it means being able to raise issues and confront harsh truths as a full member of the community. Othering, by contrast, is treating people from another group as essentially different from and generally inferior to the group you belong to.” (Wise 3).<sup>14</sup>

Brené Brown’s research suggests that when individuals are willing to embrace vulnerability and be open about their true selves, they are more likely to experience a sense of belonging, acceptance, and connection with others.<sup>15</sup> This vulnerability includes being authentic, sharing one’s fears and insecurities, and taking emotional risks in relationships.

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<sup>14</sup> Wise, Susie (2022). *Design for Belonging: How to Build Inclusion and Collaboration in Your Communities*. A Stanford d.School Guide. New York: Ten Speed Press.

<sup>15</sup> Brown, Brené. *The Power of Vulnerability: Teachings on Authenticity, Connection and Courage*. Narrated by Brené Brown, Sounds True, 2012. Audiobook.

## 2. Educate and equip the family with new skill sets

### a. *Metaskills*<sup>16</sup>

Have you ever walked into a room, and you could cut the tension with a butter knife? Or have you ever attended a wedding and felt a renewed sense of appreciation for your spouse? Well, the feeling you get in both situations is likely the result of Metaskills.

Metaskills are what you ‘perfume’ a room with when you walk into it. Did you have a difficult day? Are you feeling stuck? Are you emulating joy or is love in the air? However you feel in any given moment is often palpable to others. Your feelings not only impact but create the atmosphere that everyone experiences.

Metaskills are an attitude or stance that a person intentionally chooses. This can be anything from ‘I am a person who brings you flowers’ to ‘I embrace a curious mindset’ to ‘I’m not going to help anyone.’ Think about what it would mean to step into each of these Metaskills heading into a family gathering. What would the impact be to the atmosphere?

Marshall Goldsmith recommends in his book, *Triggers*, to undergo the following exercise *before* heading into a meeting/gathering.<sup>17</sup>

Imagine at the meeting’s end, you will be tested with four simple questions about how you spent that time.

1. Did I do my best to be happy?
2. Did I do my best to find meaning?
3. Did I do my best to build positive relationships?
4. Did I do my best to be fully engaged?

Goldsmith’s questions serve as a reminder that each family member has the *choice* to intentionally control how he or she shows up! Another question for each family member to consider pre-meeting: ‘what is the energy I need to bring into the room to foster a positively attractive environment for our family?’ What a fantastic way to consciously create the magnetic culture of a family!

### b. *The emotional field*<sup>18</sup>

If you are having a conversation with a friend and they suddenly make a terrible face, you might think: ‘Wow, my friend must be upset with me.’ Now think about what that one small interaction might do to your relationship. That assumption, coupled with others you may

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<sup>16</sup> Metaskills is an ORSC™ term. Metaskills are the attitude or philosophy with which something is done. They aid in the creation of an intentional energetic field.

<sup>17</sup> Goldsmith, Marshall (2015). *Triggers: Creating Behavior That Lasts – Becoming the Person You Want to Be*. London, UK: Profile Books.

<sup>18</sup> The emotional field is a concept from ORSC™ training and certification.

make about your friend over time, can add up and quickly turn into one big fat cognitive distortion. Yikes!

What if instead, you paused your friend when they made that initial face and got super curious. ‘I noticed you just made a face. What was that about?’ Your friend might say: ‘oh, I had something in my eye,’ or ‘I guess I didn’t follow what you were saying.’ In any case, your action is an example of reading the emotional field. And by demonstrating curiosity and asking about it, you probably prevented that face from turning into a much bigger issue in your relationship!

Brené Brown often talks about the concept of generosity.<sup>19</sup> Extend the most generous interpretation possible to the intentions, words, and actions of others. Wise words that again direct us to remain curious instead of jumping to our own conclusions.

Think of reading the emotional field as double-clicking instead of assuming. You can double-click by calling out ‘hey – it feels like the weather just changed in the room. What happened?’ Or ‘I feel that in my chest like it’s glowing. Where do you feel it?’ Encourage clients to use all the senses to double-click on observations. This openness will not only eliminate misunderstandings, but also encourage others to practice similar curiosity.

By practicing and normalizing reading the emotional field with one another, a family can start to take control of its own narrative. This aids in creating healthy communication patterns which in turn foster a positively attractive environment.

### 3. Utilize a tool such as The ACT Matrix<sup>20</sup>

The ACT Matrix is based on learning to discriminate between direct experiencing (what is happening in the physical world, including sight, sound, taste, touch, and smell) with the senses

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<sup>19</sup> Brown, Brené (2017). *Braving the Wilderness: The Quest for True Belonging and the Courage to Stand Alone*. New South Wales, Australia: Generic Publications.

<sup>20</sup> The ACT Matrix was developed by Kevin Polk, Jerold Hambricht, and Mark Webster as a way of thinking about and engendering psychological flexibility. ACT stands for acceptance and commitment therapy. To learn more visit: [The ACT Matrix](#) at the Association for Contextual Behavioral Science.

and indirect experiencing in the mind (what is happening in terms of thoughts, emotions, imagery, memories, etc.)

The idea of sorting behavior into two directions called ‘towards’ and ‘away’ is then overlaid to create four quadrants that help groups and individuals notice where their behaviors are taking them and if those behaviors align with what is important. Towards meaning ‘is this an experience I want more of?’ Away meaning ‘is this an experience I want less of?’



The premise of this matrix is that “the more frequently our behavior is guided by moving towards what we want, rather than away from what we don’t want, the happier and more fulfilled we’ll be.” (Atkins/Wilson/Hayes 74).<sup>21</sup>

Certainly, this is a model that can help families to align behavior and actions with values and goals. A great tool to use in developing a family’s ‘WHY’ and ‘WHAT.’

#### 4. Consider a new name that represents the entire family

Genesis stories throughout history refer to two original people. Both people have their own stories of origin, reflecting the family into which the person was born or raised. If they decide to form a union and only one name prevails, the origin story of one person is often minimized or lost. This impacts the origin story of the entire family going forward for generations to come. Contrast this outcome to the fact that some cultures traditionally keep both names. For example, in Chinese, Spanish, Italian, and Brazilian cultures, there are always two names and a new name that connotes both original names may form later. Both origin stories remain, and both inform the identity of the family.

When working with multi-generational and/or multi-branch families, consider all the last names that now make up this incredible group. Sure, there may be a historical name that the family wealth originates from (and it may be important to honor that name in ways that resonate with the entire family), but there is likely 20+ names that now constitute who the family has become.

To honor all names, families may choose to undergo a collaborative exercise to select a new name that embodies all that they have become and even what they aspire to become. It can stem from an

<sup>21</sup> Refer to footnote eleven.

image or a place that has meaning to the family. It can be a saying or funny phrase that unites them. Encourage families to be creative and engage all generations in the process.

One family started by picking several specific images that had a connection for everyone. They then named and wrote vivid descriptions of each image and even added examples of potential logos. These actions brought the potential new names to life! It was put to a vote and a new name was selected. The new name now shows up on their meeting materials and in invitations for gatherings. It has brought inclusion and makes even the newest family members feel a part of what makes the family great. Next up, t-shirts and coffee mugs. It all aids in the development of a strong positively attractive environment.

## 5. Bring in governance at the right time

Family governance in and of itself does not make a positively attractive environment.<sup>22</sup> Family governance is utilized to develop a collection of policies, procedures, processes, rules, and guidelines used to make things explicit in families. And while important, it is often brought in too early, way before a family understands its ‘WHY’ and ‘WHAT.’ Governance is merely a part of a family’s ‘HOW.’

Of course, once a family puts the elements of their positively attractive environment together, they will need to sometimes assess ‘is this working?’ or ‘what do we need to tweak or add?’ The answers may point to the need for some forms of governance.

For families who don’t see the value in creating a positively attractive environment before leaping into governance work, it may help to ask “what if we did the work to create a positively attractive environment and it actually surpassed our expectations? What would we notice?” Or ‘what could happen if our family does not do this?’ and ‘what is the risk of not doing this?’

# APPROACHES IN CREATING A POSITIVELY ATTRACTIVE ENVIRONMENT

Of course, there are many approaches one might take in helping a family create a positively attractive environment. Some suggestions:

## 1. Set the stage

Just like signaling a switch in lanes, it is best to share a clear message that describes what a positively attractive environment is and the reasons that the family is seeking to develop it. For example, a

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<sup>22</sup> For further information on how culture in families’ interplays with the traditional structuralist perspective of family governance, please read: Wesley, Matthew (2014, updated 2022). *The Blob: How culture eats structure for breakfast*. Located at the [James E. Hughes, Jr. Foundation](#).

family could state that they are seeking to create a flourishing system that creates positive interactions, cares for the well-being of its family members, and shows resilience. A family could also go into more detail by naming and describing some of the core components supporting the positively attractive environment, such as healthy communication, emotional support, clear boundaries, and individual growth.

In addition, the family should discuss the *purpose* of the positively attractive environment. Some key considerations to include and design intentionally around are:

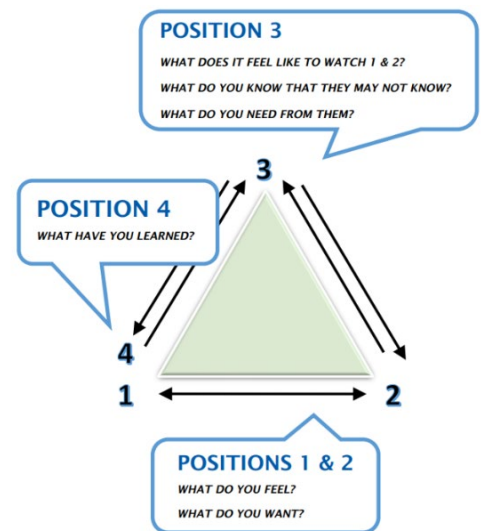
- a. where have we come from?
- b. who are we as a family and what do we want to be together when we are at our highest?
- c. how will we welcome, support, and appreciate each other (including how will we integrate the stories of those who marry into, are adopted into, or are made a part of the family in other ways)?
- d. what are the different roles members can play to contribute to the family's collective future?

## 2. Find common interests in creating alignment, not necessarily agreement

When families start working together in new ways, some members may show up with strong opinions about how things must be. The family may be stuck in its primary or 'how things have always been done *by those in power.*' But the goal is to shift to the secondary or 'the new way things are done *together.*'

One key in getting there is to understand the difference between agreement and alignment. With so many different personalities, needs, and values, agreeing on everything is rarely possible. To create a path forward, identify common interests or ground that members can align around.

One tool that can be helpful in finding alignment and in softening strong opinions to make room for new voices is The Third Entity™.<sup>23</sup> A form of systems coaching, it helps individuals to gain perspective by putting themselves in the shoes of others and in the shoes of the system. Yes, the family system is an entity all on its own! It has feelings, thoughts, and needs. This tool brings new questions into play, such as: 'what is best for the entire family system?' What is the impact of <insert changing, not changing, etc.> to the family system?



<sup>23</sup> The Third Entity™ is a concept from ORSC™ training and certification.

You may also consider using scenario planning<sup>24</sup> as a tool to get families ideating from all three different levels of reality – essence, dreaming, and consensus reality.<sup>25</sup> This tool can assist in creating vivid pictures of a family’s high and low dreams. Interestingly enough, neither of these dreams is usually obtainable or desired. Take a high dream that involves members calling or texting each other every day. Probably not ideal or welcome by all. Or take a low dream where members send obligatory Christmas cards but have little to no contact beyond. Also, not ideal.

After having some fun creating high and low dreams, members can design a realistic scenario that creates alignment. One client labeled their ideal vision as ‘comfort-food with a dose of purple stuff.’<sup>26</sup> Now, that may not evoke much for you, but it has incredible meaning for them. They now have an aspired vision to unite around as they take steps towards its achievement each day.

### 3. Memorialize in a Family Compact<sup>27</sup>

In general, compacts have great significance in the history of the world.

Take the Mayflower Compact representing the first framework of government written and enacted in the territory that is now the United States of America.<sup>28</sup> The purpose of the Compact was to preserve unity, quell conflict, and have its signers abide by certain laws that were established for the ‘good of the colony.’ Isn’t it amazing that even back then, people understood the need to sacrifice individual freedom for the common good?

Similarly, many Tribal Nations use self-governance compacts to accomplish the same. Compacts are structured so that members have an improved quality of Tribal life by benefitting around mutual interests such as services, the use of natural resources, economic development, healthcare, and more.

Today, we see modern day examples of compacts everywhere we look. Voluntary organizations, like clubs, guilds, or religious institutions use them. One can also find them in institutions like universities and hospitals or even in some corporations.

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<sup>24</sup> Kahane, Adam (2012). *Transformative Scenario Planning*. Oakland, CA: Berrett-Kohler Publishers.

<sup>25</sup> Process work highlights three distinct levels of our experience and perception, which together make up our experience of reality. Amy and Arnold Mindell refer to these levels as Consensus Reality, Dreamland, and Essence. For further information please refer to: Mindell, A. (2008). *Bringing deep democracy to life: an awareness paradigm for deepening political dialogue, personal relationships, and community interactions*. *Psychotherapy and Politics International*, 6(3), 212-225. doi 10.1002/ppi

<sup>26</sup> It is interesting to note that the family who created ‘comfort-food with a dose of purple stuff’ chose that phrase to acknowledge its members’ desire to remain independent while also seeking interdependence.

<sup>27</sup> A family compact is a ‘heart and spirit’ document, rather than a form of governance such as a family constitution or charter.

<sup>28</sup> The Mayflower Compact was signed on November 21, 1620, to create laws for Mayflower Pilgrims and Non-Pilgrims alike for the good of the colony. For further detail on the Mayflower Compact, please visit the Library of Congress at <https://www.loc.gov/>

Compacts serve the purpose of uniting people around a common set of values, goals and/or a shared purpose. In the context of family, they go beyond the Designed Family Alliance to memorialize the family's why, what, and how. They seek to bring the heart and spirit of the family to life by making the aspired culture explicit.

Just as these examples illustrate, families can also benefit by intentionally defining and documenting their own compact. Doing so helps its members to understand why they would want to sacrifice individual freedoms to be a part of something bigger than themselves. This is a critical concept in family systems as it can feel easier for individuals to just 'take what is yours' and 'go your own way.'

Bottom-lining it, a family compact aids in the unification of members by explicitly stating 'why' they all benefit from sticking together. Yet another element in creating the desired positively attractive environment.

## GETTING THE PARTY GOING...AND KEEPING IT GOING

Once a family has co-created its compact, the real work begins! Keeping the compact alive and palpable is what creates the positively attractive environment. Writing it and leaving it on a shelf does not.

Some ideas for integrating a compact into a family's culture include:

1. Review it at the start of every meeting or gathering; ask members to share what was successful about the creation process,
2. Encourage a new ritual of storytelling at family meetings that underscores components of the compact; create a family storyteller role for the elders,
3. Use it when onboarding new family members,
4. Include it in communications,
5. Bring it to life using Metaskills or other techniques,
6. Use positive feed forward/appreciation loops as members demonstrate it, and
7. Remember that it is aspired – family members should give each other the grace and the space as they learn to exemplify it.

It is also critical to help families understand that this is not a 'one and done.' All things evolve. Potential signals and best practices to work with include:

1. The family grows. There will be new values, needs, and ideas to fold in as married-ins, adopted children, or children who have come of age join the group.
2. Rising gen members need to individuate. Being a part of something bigger than yourself is wonderful, but it is natural (and needed) for younger members of the family to build their own identity. Do not force them to the table, but patiently wait for them to return on their own time.



3. People's interests and priorities change. Everyone in the family may not participate in the initial go-around (and that is ok!) Work with the willing and keep the door open for others to come and go.
4. Families need a check-up. Testing into if the family is really living into what it has designed is key. Actions need to line up with words. Another wonderful way to use the ACT Matrix.

While there are many approaches and techniques to help families create a positively attractive environment, at the end of the day, only the family can do the hard work. It will not be easy, and it will take time, but the reward is sweet. There is a lot to celebrate when family members stay committed to each other and the overall system.

## About the Author

*Katherine Dean serves as Chief Learning Officer for a Single Family Office in the San Francisco Bay Area and is the founder of Meaning Beyond Money. She assists multi-generational families and family enterprises with the intentional development of culture, wealth as well-being, and family governance. Katherine is a CTI trained Co-Active Coach and a certified Organization and Relationship Systems Coach (ORSC.) In addition, she holds a CFP, CIMA, and a Master's Degree in Taxation. Her background strongly contributes to her ability to consult at the intersection of relationships and wealth.*