NATIONAL CENTER FOR
FAMILY PHILANTHROPY

PASSAGES issue brief

EXPLORING KEY ISSUES IN FAMILY GIVING

Avoiding Avoidance: Addressing and Managing Conflict in Family Philanthropy

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Conflict is normal in any family or organization. Yet, many of us avoid conflicts, even if that avoidance affects relationships or how the foundation operates. In this issue of *Passages*, you'll learn about the most common conflicts in family philanthropy, the creative "tactics" some boards use to perpetuate the avoidance, and how you can use simple tools to address conflict in a healthy, productive way.

"Conflict will always occur in an organization that's growing, evolving, and changing. What makes it a positive or negative experience is if it's addressed, and how it's managed."

—Virginia Esposito, president of the National Center for Family Philanthropy

Picture this: You're at a family foundation board meeting (be it with your own family, or a family you work with).

Across the table from you is Dad, the founder. Dad makes a good show of wanting to include other opinions, but when it comes down to it, his word is the last word—and everybody knows it. Next to him, there's Mom, co-founder and secretary of the board, who is advanced in age and is becoming more forgetful by the week (something that no one wants to bring up with her, for fear of hurting her feelings). An aunt sits next to her, a fireball who speaks her mind and refuses to take any flak from the founder (her baby brother).

Then there are the "kids"—the second generation—a son who is so focused on his own career and family that he barely shows up; and the other, a daughter who shows a genuine desire to one day run the foundation, and yet, has different political views and interests than those of her parents. Both have children of their own in their late teens and early 20s, and no one has invited or talked about these grandchildren taking part.

Can you sense the underlying tension in the room? While this example may seem extreme, these scenarios are not as uncommon as you may think.

Families who come together in philanthropy, be it a foundation or other giving vehicle, bring their strengths, their passions, their identities, *and* their conflicts with them. Out of fear or out of love, some will go years or decades (generations even!) keeping their differences under wraps and avoiding difficult conversations.

Conflict most often occurs when people perceive that there is a threat to their needs, interests, or concerns. "Although conflict is a normal part of any organization's life, there's a tendency to see it as negative and caused by difficult circumstances," says Bobbi Hapgood, trustee of the Educational Foundation of America and founder of Philanthropic Ventures, a North Carolina-based consulting firm.

Yet conflict is neither good nor bad. It's a natural part of human relationships and a dynamic in all group settings. For the most part, disputes aren't caused by "bad people" trying to be difficult. They often result from people with good intentions trying to accomplish shared goals.

According to Ginny Esposito, president of the National Center for Family Philanthropy: "Conflict will always occur in an organization that's growing, evolving, and changing. What makes it a positive or negative experience is if it's addressed, and how it's managed."

When treated as an opportunity for growth and creativity, conflict can actually be a positive experience that leads to great outcomes. According to Jeffrey Sonnenfeld in "What Makes Good Boards Great" (*Harvard Business Review*, 2002), "The most effective boards may be those that are contentious, that regard dissent as an obligation and treat no subject as un-discussable."

By developing the skills to manage conflict—early and often—you can create a culture of healthy dissent, and save a lot of frustration and challenge later on.

COLLEAGUE SNAPSHOT: AVOIDING SUCCESSION

"I worked with one family, comprising four family branches, that has a patriarch in his 90s. He is sharp and active in the foundation, but quite elderly. There were many next-generation family members waiting in line to participate in the board; however, no one in the family wanted to bring it up with the patriarch. Similarly, he never brought it up with them. There was some misunderstanding among the different branches, because each branch thought the others knew what the plan was and that they were being kept in the dark. When I interviewed the patriarch, he shared his plans to step down from the board in the next year. When I asked him why he hadn't shared this other any other family members, he said he was confounded that no one else had brought it up!"

—Lisa Parker, executive director and president, Lawrence Welk Foundation and vice president of philanthropic services, Whittier Trust Company.

The Nature of Conflict—and Why We Avoid It

If conflict isn't bad, then why do we avoid it?

While some people are willing to fight a good fight at a moment's notice, the majority of us tend to steer clear of conflict when we can. This is part of a natural desire to work collaboratively, live in harmony with others, and get along well in society.

In families of origin, there are dozens of reasons why people avoid conflict. First and foremost, it's uncomfortable. The perceived differences, hurts and misunderstandings among family members may feel so entrenched, emotional, and personally risky, that people may choose not to "go there" when it comes to conflict. Perhaps they think: "It's never going to change; why should I even bring it up?" or "Can't we just all get along?"

Some family members might fear escalating the anger, hurt, and drama in a given situation. They might want to avoid criticism, judgment, or being seen as vulnerable. Or they might be afraid of retribution—that if they confront an issue, someone might try to "get them back."

Avoiding conflicts might keep the status quo for the moment, but it ultimately stifles the growth of both the individual and the family relationships. For families who work together in a foundation setting, the stakes are even higher.

According to Hapgood, "Conflict avoidance keeps a foundation from being able to evolve its governance structure and management. It may help alleviate tension in the short-term, but it's bad in the long-term for the foundation and the family." She notes that avoiding issues can lead to a poorly run foundation, ineffective grantmaking, ongoing miscommunications and misperceptions, and, in extreme cases, even the demise of the foundation.

One thing is certain: If continually swept under the rug, conflict will escalate.

"Some people honestly believe that if you don't deal with a problem, it will go away—and that isn't true," says Frank Merrick, trustee of the Merrick Family Foundation and principal of Foundation Management, Inc. "You can hold hands and sing Kumbaya all you want, but sometimes people just need to have it out, even if it risks hurting someone's feelings."

Merrick suggests that open, honest dialogue is key. "Nobody wants to be the jerk in the room, but sometimes you have to be that person and speak up in order to get things on the table. The board ought to welcome that dialogue, with a 'thank you for making us discuss this.'"

"I'm not opposed to a knock-down, drag-out fight in a board meeting. We don't try to have total harmony."

—Frank Merrick, trustee of the Merrick Family Foundation and principal of Foundation Management, Inc.

Top 7 Conflicts Families Avoid

"People avoid succession like crazy."

– Alice Buhl, senior consultant at Lansberg, Gersick & Associates

Family relationships among board members can be both a blessing and a challenge. Here are some of the most common conflicts a family foundation board might experience:

- ***Succession***. No one likes to think about his or her own mortality or "aging out" of the foundation. Younger generations may feel it's too sensitive a topic to bring up with their parents or grandparents. The kids may be afraid to step into their parents' territory, and the parents may be worried that the kids aren't interested. The result? No one talks about it—or if they do, they are often unsure how to go about it.

  A family foundation that develops a succession plan early can prevent family difficulties later. Without a clear plan in place, a board may select successors arbitrarily, causing resentment or frustration on the part of those not included. (For more on succession, see the *Resources* section.)

  Succession is more than training the next generation—it's also about *valuing* them and their participation. "You can train kids all you want, but if you don't show you *value* them and their point of view, you won't hand over the foundation well," says Merrick.

- ***Access to the foundation***. Sometimes related to succession (but not always), conflict can arise when it comes to *which* family members or family branches are chosen as board members. There are only so many seats on the board, which means some family members or branches must wait their turn (and that's *if* the foundation has a rotation policy). For example, if one brother is chosen as the succeeding board chair over his other siblings, this may lead to tension, anger, or hurt feelings among individuals or branches. Or if one family branch has more representatives on the board than the others, again, it can lead to suspicion of favoritism or of feeling "left out." In addition, there may be resentment between family members who devote a considerable amount of time to the foundation, versus those who just show up to board meetings or don't have as much time as they would like to participate.

- ***Who's on the board?*** If new family members join the board, such as spouses, in-laws or non-family members, it may create uneasiness among the current board. They may feel these new members do not share a common bloodline, history or reverence for the original donor's intent, which can create a culture of clannishness among family-only board members.

  In addition, if there are no set policies about board qualifications, eligibility and the number of board seats, it may create a perception that the foundation is "up for grabs" for any family member, with any level of education or experience, to join. This can create an awkward situation for both the current board and those waiting in the wings.

- ***Minority rule***. Minority rule is when one personality dominates the foundation or board meetings, and the rest of the board bends to meet this person's demands. "An example of this is when Granddad is still at the board

table getting old and cranky, and no one wants to contradict him," says Merrick. "It can also happen when one of the board members bullies the others." (See *Poor performance and inappropriate behavior*, below.)

If this person happens to be the original donor or board chair, sometimes this is called *founder's syndrome*. The founder may think of the foundation as "his" or "hers" rather than a public trust governed by the board. He or she may micromanage or have trouble letting go. When minority rule goes unaddressed, it can lead to board (and staff) turnover, internal resentment and fear of the founder/dominant person, and board members who feel they don't have a voice.

- ***Rivalry among siblings or family branches.*** Rivalry is built into sibling relationships from an early age, and can continue well into adulthood—manifesting itself into long-standing rifts among entire family branches. Siblings are often sensitive to unequal treatment—either real or perceived—and this can cause eruptions around the board table.
- ***Poor performance and inappropriate behavior.*** Sometimes family members have personal issues that affect the way they relate to the rest of the board. These issues might be rooted in their perception of the foundation or the wealth itself, or it could be outside issues that then present themselves at board meetings. Poor performance might be anything from missing meetings, not participating even when *at* meetings, and not following through on what is promised. This could be the result of a board member's busy career and family life, or simply not having time to devote to the foundation. Or, it could be that the member feels obligated to be part of the foundation, even though he or she isn't really interested.

  Inappropriate behavior could include any range of activities that thwart board operations. Some examples include: spreading misinformation (either deliberately or unintentionally), repeatedly contradicting, disrupting or manipulating the flow of discussion; stifling others' ideas; verbally attacking or giving the "silent treatment;" denying that problems exist; etc.

COLLEAGUE SNAPSHOT: FOUNDER'S SYNDROME

"My impression before I came to the foundation as the first non-family president was that the board just 'sucked it up' when it came to the founder. He was such a large and powerful presence that, even if they voiced their displeasure, they had to stick it out. Eventually, the board wanted to do a strategic planning process, and the founder was dead-set against it. Finally, one of the younger family members had to say to him: 'If you're going to be obstructive to our strategic planning process, you need to get out of the way.' And he did. He didn't like it, but he did step out of the way."

—Family foundation trustee

COLLEAGUE SNAPSHOT: ACCESS TO THE FOUNDATION

"Access to the foundation has been a big point of contention in our family. There's a huge discrepancy among members when it comes to personal resources. Some of the family has to work full-time and can't afford to take off work for board meetings. Others don't work and have the luxury to put more time and energy into the foundation. This causes tension on both sides: The family members who work think the others have more access and power in the foundation; and those who devote themselves to the foundation say, 'Well, you're not putting the work in so you shouldn't get to decide what happens.' The question we're left with is, how much do we bend the board's operations to increase access for individuals?"

—Bobbi Hapgood, trustee, Educational Foundation of America and founder, Philanthropic Ventures

Poor performance and inappropriate behavior call for the board's leadership to swiftly intervene, identify the nature and cause of this behavior, and, if necessary, remove the member from the board. Of course, if the board leader is the one behaving badly, or has an alliance to the troubled board member, then this can make for an especially difficult situation for the rest of the board.

- ***Disagreement around program or geographic areas.*** Board members may have personal, religious or political differences, or the younger generation may have different interests than the elder generation. In addition, some board members may live in different cities or states, and have little to no connection with the geographic area where the foundation funds. This can cause these board members to lose interest or push for other funding priorities.

  When not taken personally, however, individual differences among the board can be positive and important, as they allow other family members to learn new perspectives and gain respect for beliefs outside their own.

"In our family, one branch is thought of as the bad actors. This perception has rolled down the family line into the kids. Family members assume there's a hidden agenda instead of getting to know these kids as the individuals they are."

—Family foundation trustee

The Many Faces of Avoidance

Avoidance doesn't always look like avoidance. This can make it confusing for family boards to recognize or navigate it when they fall into an avoidance trap.

In some cases, avoidance tactics can present as if the board is doing a good thing. For example, one family foundation devoted hours at its board meeting reviewing word-by-word the punctuation in their trustee manual. On the surface, this attention to detail may have been seen as helpful or positive; however, this left no time in the meeting to tackle the real issues of tension that were undermining the foundation. The "avoidance" was covered up by the task-at-hand, giving the board a built-in excuse to not address the conflict.

Here are some of the most common "masks" of avoidance:

1 | Simply not making the time.

"Not making time to address conflict is a big one in family foundations," notes Frank Merrick. "The real issues are often left to the bottom of a meeting agenda, and time runs out." When there's a difficult conversation that needs to happen, he said, it's best to place it at the top of the agenda—and dive right in.

2 | "Keeping the peace" or protecting others.

The emotional desire to maintain family harmony or protect one or more people in a group can actually block open, honest dialogue. For example, a parent might want to prevent her children from getting their feelings hurt, and therefore might inadvertently sidetrack or shut-down conversations that risk doing so.

3 | Stonewalling.

Rather than speaking directly about what's bothering them, some board members might use subversive behavior to make a statement. For example, one might show up to meetings but refuse to participate in the discussion. Perhaps they exhibit passive-aggressive body language, such as eye rolls, grunting or sighing, or stay glued to their cell phone or laptop the whole time as a way to avoid taking part.

4 | Overuse of consensus.

Consensus decision-making is a positive way to come to a mutual understanding and agreement around a shared goal. As an avoidance tactic, however, the need for all-consensus, all-the-time, can be a way to quash differences of opinion and the freedom to express them. According to Frank Merrick, "Families ought to be encouraged to disagree, and if someone wants to vote no, they should be able to do that."

5 | Overuse of discretionary grants.

Discretionary grants can be a wonderful way to honor and encourage individual giving and allow board members to be charitable in their own communities. In the extreme, they can also be a way to "work around" conflict, to appease certain members or avoid agreeing on a common mission or funding priority.

6 | Splitting or dissolving the foundation.

In some cases, different personalities, family branches or generations may come to an impasse. The differences may run so deep, so far divided, that the family chooses to split the foundation or allocate giving by branch or generation. Splitting can be a way to avoid difficult discussions and the need to come to some mutual agreement around mission and program priorities. Rather than tackling issues head-on, a split allows everyone to scurry off into their own separate camp.

Splitting can also be a healthy way of admitting there's such a high level of conflict that it won't get resolved. In this case, it's the right solution. If splitting isn't a viable option, the foundation might also decide to spend down or dissolve.

If a family foundation wants to survive over time as an effective, outcomes-based organization, conflict is something that can't be ignored.

COLLEAGUE SNAPSHOT: OVERUSE OF CONSENSUS

"In the past, we had huge conflicts around how resources were used. In the 80s, the foundation almost split into two or three foundations. The three family branches had very different views about what should be funded, and there were complaints that grants were funded based on one family's side or one person's interests. We brought in a consultant, and the result was that 98 percent of the proposals got passed for the next two decades. Everyone passed proposals to get their own proposals passed—people were afraid to be too critical."

—Bobbi Hapgood, trustee, Educational Foundation of America and founder, Philanthropic Ventures

Healthy Tools to Manage Conflict

Now that you've learned about the most common conflicts and the tactics typically used to avoid them, you might be thinking: What can be done? Can a foundation that is riddled with conflict and stuck in avoidance be saved?

The answer is yes. It takes work and a quorum of people who want things to change. Yet it can be done. There are tools that can help.

First, it's important to know that *the family culture sets the tone for how families behave.* Alice Buhl, senior consultant at Lansberg, Gersick & Associates, advises that if you don't know how your family works, it's hard to change anything.

"The more a family is aware of its culture, the better they can understand how they operate within it," says Buhl. "It helps to give people words to talk about their family culture so that they can be more conscious about how they interact. That way, they can call themselves out on it or change it." (See the Resources section to learn more.)

In addition, good leadership matters. "Families do well when they have a leader who creates a healthy climate for meetings and board interaction. A good leader frames the issues and manages conflict as it happens, rather than shutting it down," says Buhl.

In addition to awareness and leadership, what else can be done? Here are 10 tools to address and manage conflict, both preventatively and after-the-fact. You can experiment with these tools and see what works for your board.

1 | Create policies and guidelines for the foundation before they become issues. Having policies in place before a conflict arises can be the best medicine. Consider policies on board qualifications; eligibility for board membership (include language that addresses spouses, in-laws, step-children, etc. and what happens when there's a divorce); succession; terms and rotation policies; reimbursement; decision-making; and more. Be sure to apply those policies equally, and not in reaction to one individual. In addition, be sure the foundation has a clear mission and grant guidelines. This can help prevent confusion and personal agendas when it comes to grantmaking.

2 | Set clear expectations for board members. It sure helps create clarity when board members actually know what it is that's expected of them. As a committee, create a clear statement of board member expectations, and share it with all members—new and seasoned alike! In addition, orient new board members about the foundation's history and values, and about their legal, financial, and grantmaking roles and responsibilities.

"When we opened up the board to spouses, we came up with a set of guidelines for every potential problem we could think of. One policy we set: If you're divorced or separated for more than six months, the non-family spouse has to leave the board."

– Lisa Parker, executive director, Lawrence Welk Foundation and vice president, Whittier Trust Company

"We surveyed our grantees with the help of an outside consultant, and used this data to reflect on ourselves and how we operate. Having this data from the outside world helped us address some of the unspoken conflicts in the family."

– Bobbi Hapgood, trustee, Educational Foundation of America and founder, Philanthropic Ventures

3 | Create a safe space in meetings. Try to create an atmosphere of mutual respect, listening and empathy in the boardroom and beyond Establishing meeting rules can help (but be sure those rules don't contribute to avoidance!). Rules can be about openness, about airing issues, about hearing everyone's voice equally. People can take turns enforcing the meeting rules in a friendly but firm way.

Offer a "parking lot" for issues that seem too overwhelming or heated in the moment. The board can always come back to these issues once people have a chance to calm down.

4 | Make time for conflict. Schedule time on a regular ongoing basis for people to air their differences and problems. This can be part of a more formal "conflict management process," or an informal "okay, let's get our issues on the table" talk. By creating a set "time" to bring up difficult issues, you can give people an opening to talk about conflict in a responsible way.

5 | Name the issues. Don't let uninvited elephants stay in the room—call them out. This isn't always easy, and in some ways, can escalate the conflict before it assuages it. However, naming conflict is often the first step in managing it. Naming can happen in the moment of conflict, in retrospect, or to acknowledge ongoing conflicts that keep rearing their head.

6 | Keep track of conflicts and why they occur. During meetings, track and see what issues rise to the top, and decide which need to be addressed now—and which can be addressed later. Notice if there are certain times of year (e.g., grant cycles, holidays, stressful times) when conflict seems to be more present than others. The more you can understand these conditions, the better you might be able to predict conflicts that are likely to arise.

7 | Appoint a team to seek out best practices from other foundations around conflict management, and report back the learning to the board.

In this way, the board can approach conflict as an opportunity for learning and professional development, rather than something to take personally.

8 | Develop terms for board leadership. Some believe that board leadership (or membership, for that matter) shouldn't be a lifetime appointment. If you have not already done so, consider instituting terms and term limits to give other qualified family members the chance to lead or be on the board. At a minimum, be sure that you have identified qualifications for the chair role and make sure you have a chair that can meet them.

9 | Consider including nonfamily board members or "wise counsel." Family members behave when there are others in the room. If you include nonfamily board members or others whom the family respects for their wisdom and perspective, family members may act kinder and more professional in the foundation setting.

10 | Break bread together. Recognize the value of the foundation to the family beyond its grantmaking mission or money. Socialize! Remind people that they are part of a family. Share a meal, or dedicate the beginning or end of meetings with time to catch up and nurture relationships. Getting to know each other outside the boardroom can lead to more productive and collaborative environment inside the boardroom.

When do you need outside help?

Sometimes families can navigate their way through conflict, and other times they can't. If your family foundation is struggling or stuck, it's time to call on outside support. You can either engage a professional family advisor or call on a trusted, unbiased colleague. A neutral party will hear from everyone, and reflect back the things family members cannot say to one another. They can help you identify trouble spots, and suggest options for working through them.

Here's a quick self-assessment tool that you can do yourself or share with your board. Make it anonymous to see how everyone views conflict and how it affects foundation's operations. You can use these questions, or create your own.

How strongly do you agree or disagree with the following statements? (Options can be on a scale of 1 to 5—1 being "strongly agree" and 5 being "strongly disagree.")

- We handle conflict well in this family; disputes and disagreements rarely interfere with our interactions with each other.
- We have a clear policy in place that describes board member expectations, and all members adhere to this policy.
- We do not have a history of holding grudges.
- Individuals are valued in this family for their unique voice and contributions.
- We talk about and value differences in opinion, even if it means agreeing to disagree.
- When conflicts arise, we work together to resolve them in a timely way.
- We have strong board leadership that fosters a safe, respectful, problem-solving environment.
- Family politics (alliances, loyalties, hierarchies, etc.) do not get in the way of our work together.
- We communicate clearly and directly with one another. There is rarely any "side-talk" that goes on behind backs.
- We talk about the future openly, and have a clear succession plan in place.
- Even when tasks are hard, working together is enjoyable.

If some members of the board strongly disagree with any of the statements above, pose the question to the board: Would the family benefit from outside support to improve our operations and relationships?

Source: Some of the above questions from *The Succession Workbook: Continuity Planning for Family Foundations*, by Kelin Gersick, Deanne Stone, 2000.

IN THE HEAT OF THE MOMENT: HOW TO PERSONALLY COPE WITH CONFLICT

When you are the midst of a conflict, it can feel confusing and disempowering. While you can't necessarily control what's going on around you, you *can* choose to respond responsibly. Here are some tips for managing the conflict internally.

- **Notice the common signs for when you feel threatened, offended or triggered.** These could be shortness of breath, sweaty palms or other physical sensations, difficulty paying attention, emotional outbursts, shutting down, feeling victimized, blaming or judging defensively. Once you identify your "tell-tale" sign, you can name it. "I'm triggered right now." Naming it in itself is a powerful practice.

- **Take space to re-center yourself.** When you feel angry, hurt or triggered, there are two things to remember: Don't act (even though you really want to!), and try to find some space to center yourself. The idea is not to avoid a situation, but to return when you are more capable of dealing with it. Taking space could be physically excusing yourself from the room (no one can argue with a bathroom break); or stating a "discomfort caveat"—acknowledging that you are feeling off-balance in the moment, and need some time to gather your thoughts.

- **Shift the energy.** Sometimes you need more than taking space; you need to physically shift your energy. Try deep breaths or moving your body (getting up, walking, stretching). Or use humor if you can, which can be a quick way to diffuse anger and change the atmosphere in a room.

- **Respond skillfully.** When you feel ready and able to think clearly, you can respond to the situation intentionally. Use "I" statements to clarify what you have heard, and what your needs, concerns and feelings are. Approach the conflict from a problem-solving point of view, and although you might be feeling angry or sad, try to stay calm and patient through the process.

In Conclusion

"In our family, it's our conflicts that have kept us sane."

– Family foundation trustee

Remember, conflict in itself isn't a problem. It's important for board members to go to bat for what they believe in, and in fact, disagreements and discord that can sometimes catalyze the most creative solutions. Conflict, as uncomfortable as it is, can ultimately bring a board—and a family—closer together.

It's *avoiding* conflict and letting it fester that's the real troublemaker. If you or your fellow board members know there's something that isn't getting addressed, don't let it linger. Be brave. Bring it up—before it gets too big and too overwhelming. (And get help if you need to!)

Here's one more piece of advice: When addressing conflict (or conflict avoidance), know that you don't have to tackle every challenging issue at once. The point is to plan ahead for conflict when possible, so that you can be proactive, not reactive. And who knows? You might be pleasantly surprised by your board's ability to move through these conversations and grow in relationship to yourselves, as both a family and a foundation.

Resources to Learn More

The Family Diagram, a tool to map family systems, narratives and behavior. 21/64 and Relative Solutions, 2014. www.2164.net/store/tool/family-diagram

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About the National Center for Family Philanthropy

The National Center for Family Philanthropy (NCFP) is the only national nonprofit dedicated exclusively to families who give and those who work with them. We provide the resources, expertise and support families need to transform their values into effective giving that makes a lasting impact on the communities they serve. Together, we make great things happen.

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