Giving Harmoniously as a Family

By Fredda Herz Brown and Katharine Gratwick Baker

If you're in a family that gives together, you naturally want the process to go smoothly and harmoniously. But how do you achieve that? Does it mean that everyone goes along with the family leader in order to keep harmony? Does it mean not rocking the boat and not proposing new ideas? Does it mean deferring to someone outside the family in order to keep the peace?

In our experience as consultants, we have found a musicical metaphor to be a useful image for thinking about harmony. In a classical string quartet or a jazz combo, all the musicians play their own instruments and parts. They also play in tune with each other, in the same key, and at the same tempo, creating a beautiful interweaving of individual solos and group synchronic-ity that fulfills their common intention for the music. In terms of family philanthropy, we might say that decision-making members of the family play their own "instruments" and "parts," knowing clearly what they think and where they stand on gift-giving—but they join with other family members in a common intention or with a common set of values when making philan-thropic decisions. This is the art of giving harmoniously.

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Family Patterns

How does a family develop this kind of harmony? Typically, families have recurrent patterns that affect the way they work together. These patterns have evolved over time through generations. Most operate under the surface and people are not usually aware of them, yet they can have a powerful impact on family relationships and decision-making. The following patterns occur frequently in families, and knowledge of them, along with a willingness to adjust them as needed, can help develop more harmonious family-giving processes.

Pattern 1: The Balance of Separateness-Connectedness

We all want connection, but some want it more than others. Over generations, families develop expectations about the degree to which their members will stay involved with one another. In some families, people have a strong sense of being separate individuals. They maintain contact with one another while expecting individuality in their thoughts, opinions, and feelings. In other families, being involved with each other is highly valued, and people tend to "go along" with others so they won't rock the boat or because they think they are keeping the peace. Sometimes individual differences around separateness and connectedness within families show up only when a family member deliberately rebels against the usually unspoken norm.

Every family seems to have a "place" on the continuum, balancing the amount of connectedness or separateness it can tolerate. Where a family falls on that continuum will affect how family members work together.

Example:
Sarah's family is about to have its end-of-the-year meeting to decide where the family foundation's funds will go. The meeting has been scheduled for months, but now two of her four young adult children say they can't come because they will be skiing in Colorado that week. They will send in their opinions by email, but prefer not to get together with the family.

Interpretations and Possible Solutions:
▌ The two young people may simply have less of a desire for connection than the family norm, or they may be using separateness and distance as a way to handle differences of opinion in the family. They may or may not want to be involved with family philanthropy at all. If not, they may be hesitant to say so directly, given the family's expectations of connectedness. One approach is to have a neutral consultant meet with them to find out what is really going on.

▌ If differences of opinion in the family are an issue, they might be resolved by agreeing to allocate some resources to individual projects and some to shared projects, thereby honoring the value of both. This approach, used by many families, helps keep family meetings from turning into a battleground, which, in turn, makes participation in family decision-making more attractive to everyone.

Pattern 2: Family Roles

Traditional vs. Non-traditional Roles

All family members have roles or functions they play in the family unit. These are often influenced by birth order and gender, and they tend to set up patterns that define who leads and who follows when families make decisions together. In traditional families, leadership roles tend to be held by men and/or eldest siblings. The followers tend to be women and younger siblings. Things seem to work out well if everyone trusts the leader and if the leader is calm, thoughtful, and perhaps neutral, keeping the best interests of all the family members in mind. However, if someone questions the leader or his intent, the discomfort often goes underground, expressing itself in other areas of the family's life.

Example:
John's two granddaughters are dissatisfied with the choices the family foundation has made about its grants this year. Money, as usual, is going to the family church, the United Way, John's college endowment fund, and the local hospital. John is the chair of the board, as his father and grandfather were before him, and no one has ever questioned his authority before. He doesn't have much confidence in his granddaughters' judgment, since they have only recently joined the board. He most certainly will not go along with his granddaughters' idea of contributing to a local rape crisis center, even though their mother also seems to support that idea. But now the granddaughters are threatening to resign from the board unless they can have more input.

Interpretations and Possible Solutions:
▌ Women and young people are asking for more inclusion than ever before, and they need to be prepared to assume leadership roles when the older generations are no longer around. One approach is to involve the granddaughters in reviewing grant applications, making site visits, and talking with the directors of local nonprofits, so they can learn more about how to make careful decisions.

▌ Another approach is for John to talk with his granddaughters with the idea of learning about their values and interests, including their interest in funding the crisis center. This process may be hard for someone who has always been in charge, but a little flexibility and an open mind could keep the granddaughters on the board and help prepare them to be responsible leaders.

Over- and Under-functioning Roles

Usually in families, some individuals (sometimes called "over-functioners") will take on more responsibility than others. Often, this is the oldest sibling. Others (called "under-functioners") take on less. Over-functioners may enjoy their
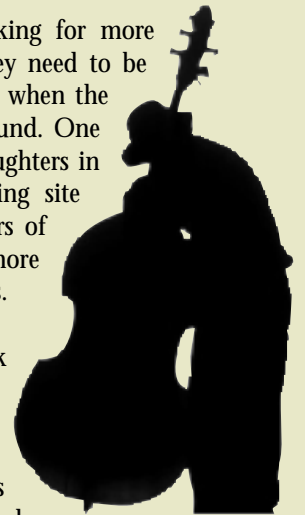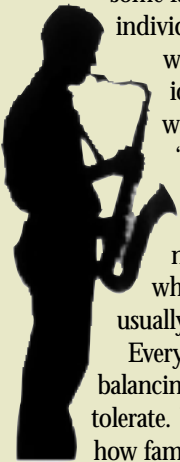
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position; they may also tire of it, feel it to be a burden, and/or get burned out. The under-functioners may love feeling free of responsibility, but over time, they may grow less competent and become excessively dependent on others. If these positions rigidify, they can affect the way people participate in family decisions, with some family members speaking more and taking a more active role in decisions while others are less involved.

Example:

Emily is the oldest sibling in her family and has been the over-functioner for years. She started out as Mom's helper in childhood, and went on "helping" her two younger brothers throughout their lives, often making decisions with them (and for them!) about their inheritances, and taking the lead in family gift-giving. She has recently begun her own family and her brothers are afraid she cannot continue to take care of everyone in the family in the same way as before.
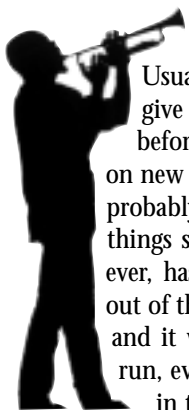
Interpretations and Possible Solutions:
Usually, the over-functioner has to be willing to give up some of her extra-responsible behavior before the under-functioners will step up and take on new responsibilities. This is not easy and Emily is probably doubtful that her brothers can do all the things she thinks need to be done. Someone, however, has to take the initiative in getting the family out of this over-functioner/under-functioner pattern, and it will probably have to be Emily. In the long run, everyone will benefit from having more people in the family involved in running things.

Pattern 3: Triangles

Some behavioral scientists use the concept of triangles to understand relationship challenges in families, and think of relationships as forming in patterns of three rather than two. For instance, when two people are very close, there is often an outsider who would like to join their closeness. The closeness of the twosome then tends to get defined in terms of their closeness and/or distance from the third.

Another kind of triangle occurs when two people are in conflict. They seek to decrease the tension between them by appealing to others who are willing to listen to their story and/or become allies on one side or the other.

In most families, several subjects typically increase tension between family members: children, sex, money, in-laws, and a few issues specific only to that family. When these subjects are raised, family members tend to take positions, often in direct opposition to someone else's. Thus, two-against-one—or two-against-all—are common configurations in families, especially when there are differences of opinion in decision-making.

When situations get very polarized, the issue usually has deep roots in unresolved relationships from the past, and multiple family members often become involved in the conflict. Although triangles may relieve tension temporarily, they do not resolve conflict in the long-term. In fact, they tend to add another layer of conflict and complicate resolution of the original issue.

Example:

Steve and Mary have always disagreed about how to commit their annual charitable giving. In recent years, the disagreements have become more intense, and they have begun to try to draw their two adult children into taking sides. The son has been willing to take his mother's view, but the daughter has been talking with her father's sister about how difficult her parents are. This creates an "interlocking triangle" with the larger extended family, as the aunt eagerly spreads the word. Now everyone is taking sides and the whole family is polarized.

Interpretations and Possible Solutions:
When triangles have formed, they need to be either dismantled or managed. The following guiding principles for managing triangles may be applied by any member of the family.

▪ First, recognize that when there is a conflict, there is probably a triangle somewhere. Try to figure out the part you are playing in it, because resolving the conflict will be easier if you begin with yourself.

▪ Second, never talk to a third person about a problem you are having with someone else, unless you are seeking assistance for how to manage yourself in the situation.

▪ Third, deal directly with the person with whom you are having the problem. Describe your position using "I" statements rather than attacking the other. (For example, "This is how I see it…" rather than, "You just don't get it…")

Probably not all of Steve and Mary's disagreements will go away just because they have applied these principles, but conflicts will be more likely to stay between the two people involved, and that's a lot easier on the family.

Conclusion

When you and your family are making decisions together about charitable giving, the first step toward greater harmony is to notice and acknowledge family patterns. The next step is to figure out what your own part may be in them, since changing group dynamics is more effective when you start with yourself. By recognizing patterns and devising solutions, you may help move your family in the direction of more harmonious decision-making. If the patterns continue, a neutral outside consultant can usually help you move beyond inharmonious cacophony. ▪