



Genograms and Family Philanthropy

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Family Wealth Includes

A family benefits from nurturing the four forms of wealth:

- *Human Capital* – history, talents, mission
- *Intellectual Capital* – knowledge, governance
- *Social Capital* – Relationships within the family and society at large
- *Financial Capital* – property and monetary assets

Family Wealth: Keeping It in the Family; James Hughes, Jr.



Questions for Families

- What is really important to your family?
- What are your family's true assets?
- What can you do to support a member's life journey?
- How wealthy do you want your children to be?
- Do you feel you have a responsibility to society?

Wealth in Families; Charles Collier 2006



Successful Families Make Thoughtful Choices about their Wealth by:

- ✔ Focusing on human, intellectual and the social capital assets of family members
- ✔ Developing a collaboratively defined vision statement
- ✔ Working on enhancing intra-family communication
- ✔ Creating mentor relationships when establishing family trusts



In Reality...

this can be **Difficult!**

- Tensions emerge from being an individual and a member of a family
- Families exhibit two strong forces; one pushing towards togetherness; while the other pushes towards individuality
- The family force towards togetherness is usually strongest
- It can be difficult for members to make choices different from others and remain within the family unit



Family Roles

- Roles determine what is expected of each family member
- Basic roles: father, mother, husband, daughter, grandmother, etc.
- Descriptive roles: caretaker, enabler, decision maker, “responsible one”, “rebel”
- Genogram will help clarify basic and descriptive roles



Family Rules

- Family rules determine how the family operates – they are often unspoken
- How do family members express their anger?
- How is affection or emotion displayed?
- How are financial, medical, philanthropic decisions made?



Family Systems Theory

- ✔ Theory suggests that families are systems of inter-connected and inter-dependent individuals
- ✔ Family members cannot be understood in isolation from the system
- ✔ As family roles and rules are reinforced they become patterns



Homeostatic Balance

- Systems develop patterns which are reliable and predictable
- Whether the patterns are adaptive or not – there is pressure from the system NOT TO CHANGE
- Change may cause anxiety affecting the roles of all family members



Family Triangles

- ✓ Triangle is a three person relationship
- ✓ Building block of larger emotional systems because it is the smallest stable system
- ✓ A triangle is more stable than a two person system because it can tolerate much more tension without involving another person
- ✓ Tension in a triangle can shift among three relationships and helps maintain homeostatic balance



More About Triangles

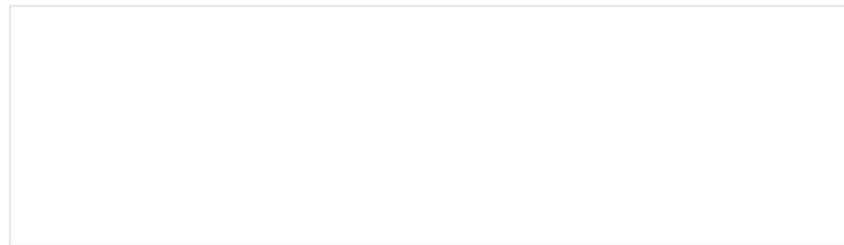
- ✔ Triangles create an “odd man out” which is very difficult for individuals to tolerate
- ✔ Someone is always uncomfortable in a triangle and pushing for change
- ✔ Getting pushed from an “inside” to an “outside” position can cause depression, anxiety or physical illness
- ✔ Two parents focused on a child can contribute to rebellion, depression, eating disorders, risky behaviors



The
Multicultural
Family Institute

Standard Symbols for Genograms

Male Female



Birth Date

'41-



written on
left above
of symbol

Age

'82-



written
inside
symbol

Death

1943-2002



an X through Symbol
Age at death in box
Death date on right
above symbol

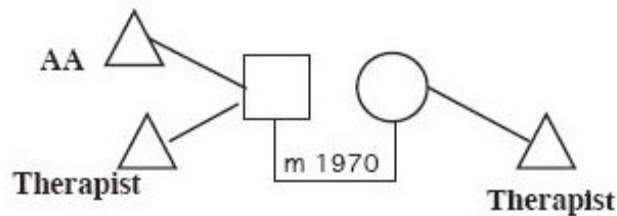
**Location &
Annual Income**

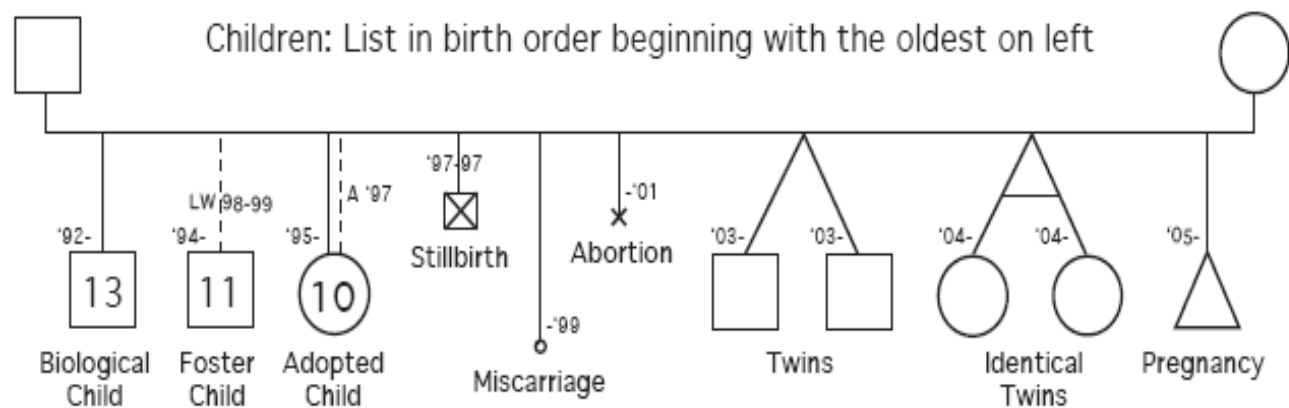
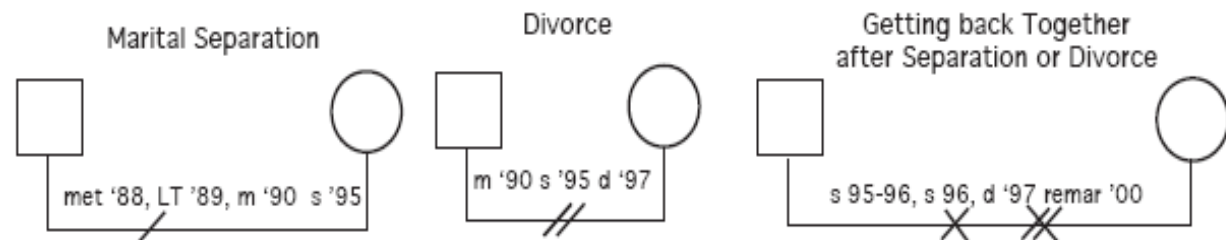
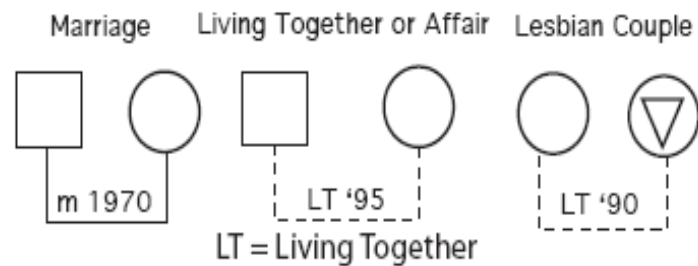
Boston
\$100,000
'72-



written above birth & death date

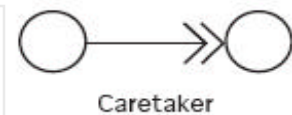
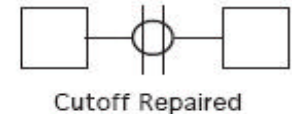
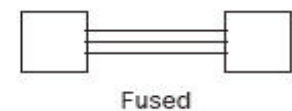
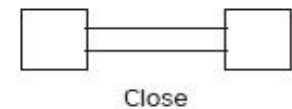
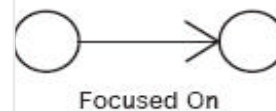
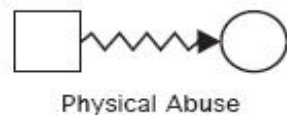
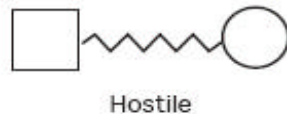
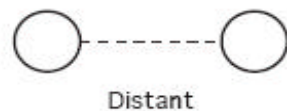
**Significant
Institutional
Connection**





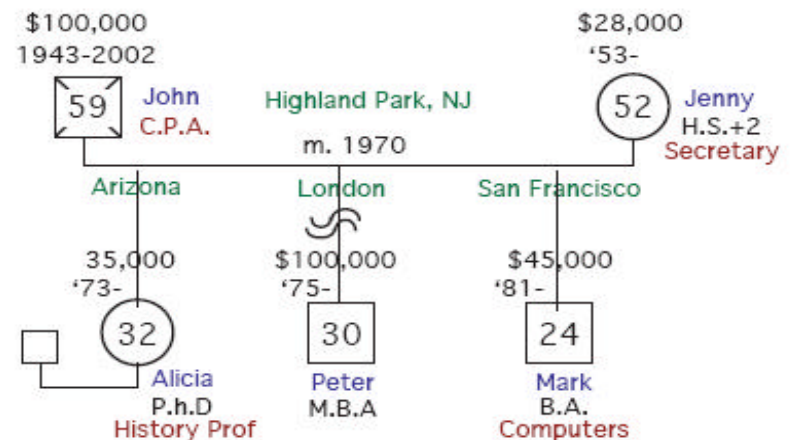


Symbols Denoting Interactional Patterns between People



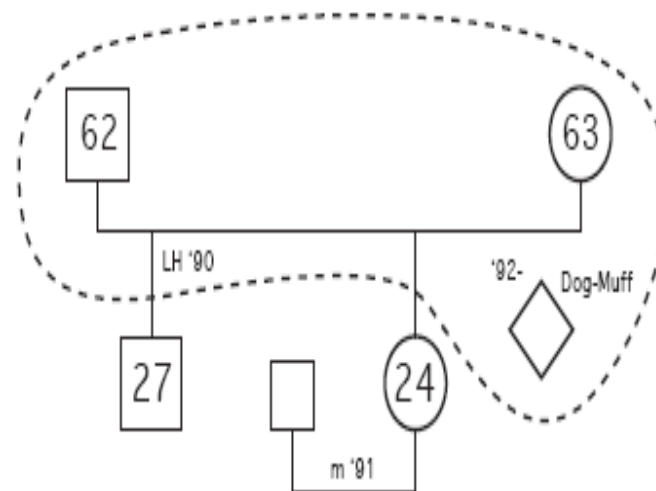
Annual income is written just above the birth & death date.

Typically you would include the person's occupation and education near the name and the person's whereabouts at the top of the line connecting to the symbol.

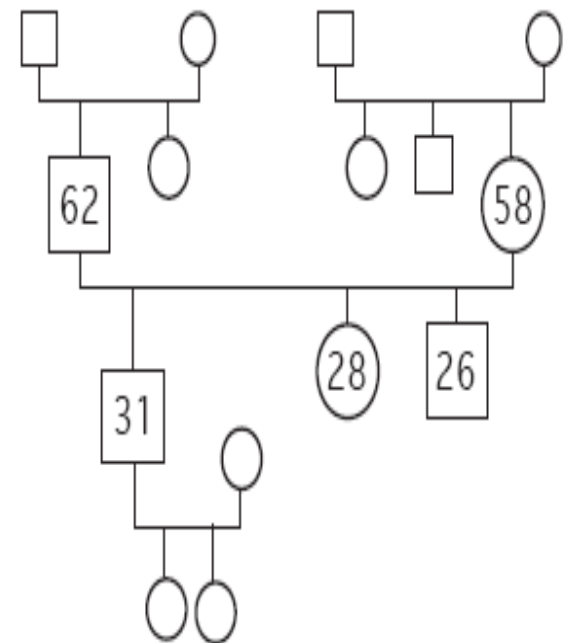




Household shown by encircling
members living together
(Couple living with their dog after
launching Children)

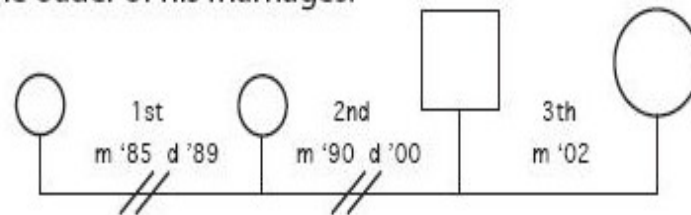


Siblings of Primary
Genogram Members are written
smaller and higher. Spouses are
written smaller and lower:

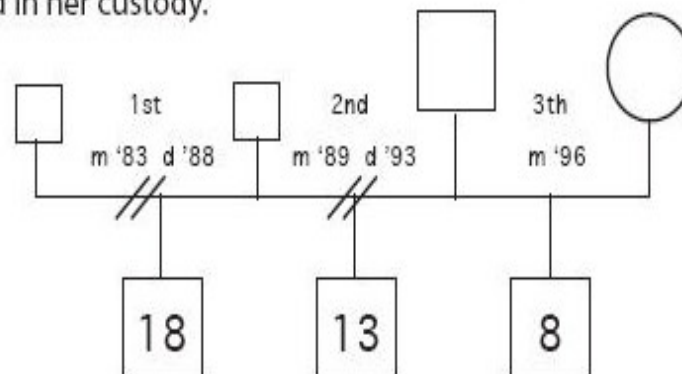




- 1 Husband, His Current Wife and his Ex-Wives (who are shown lower and smaller). Husband's wives may go on left to be closest to him. Indicators "1st," "2nd" etc. make clear the order of his marriages.

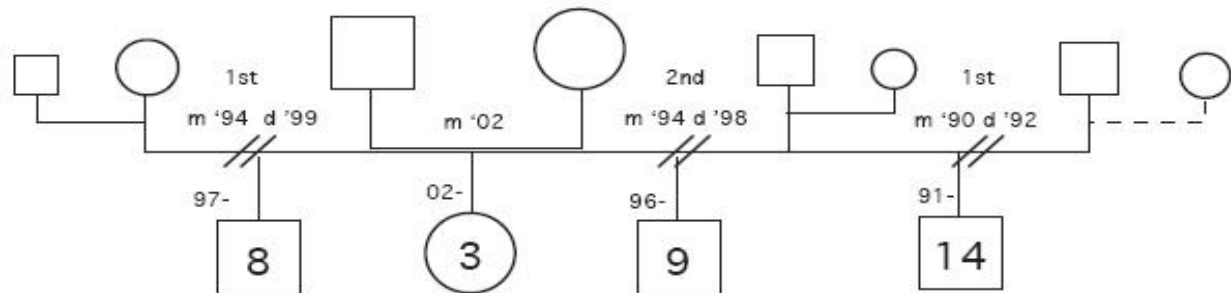


- 2 Wife, Her Current Husband and her Ex-Husbands (who are shown lower and smaller). Wife's previous relationships are shown on left to keep children in birth order, since they remained in her custody.

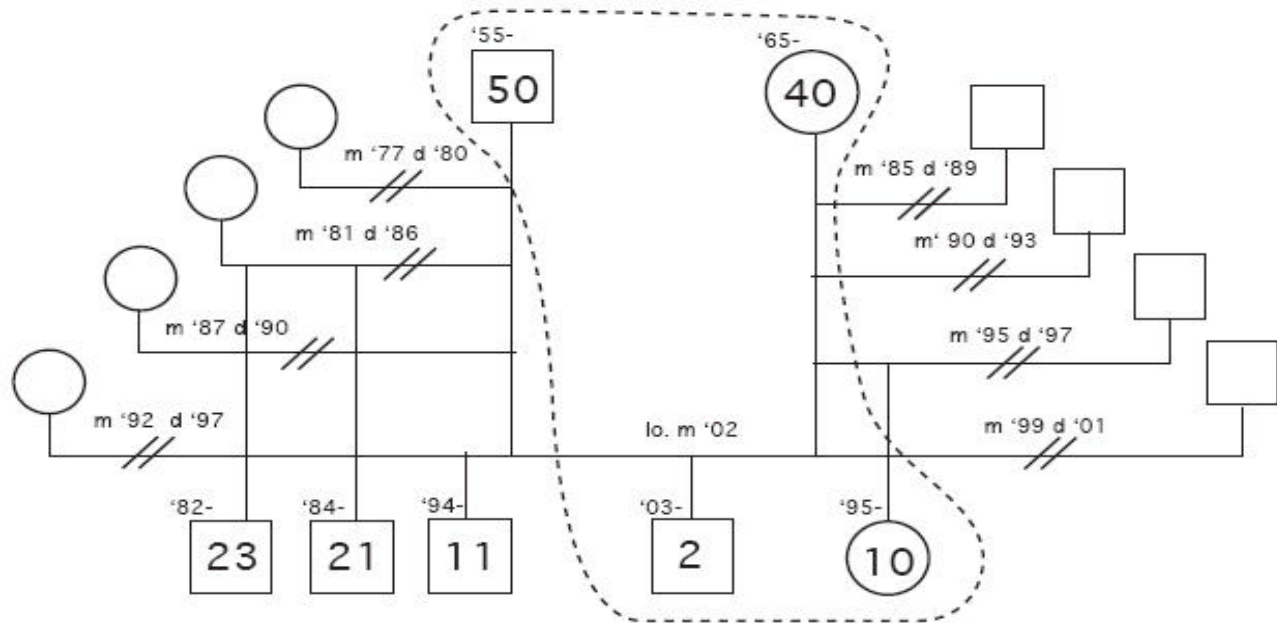




- 3 Couple with 3 year old, showing their previous spouses (smaller) and those spouses' new partners (even smaller)

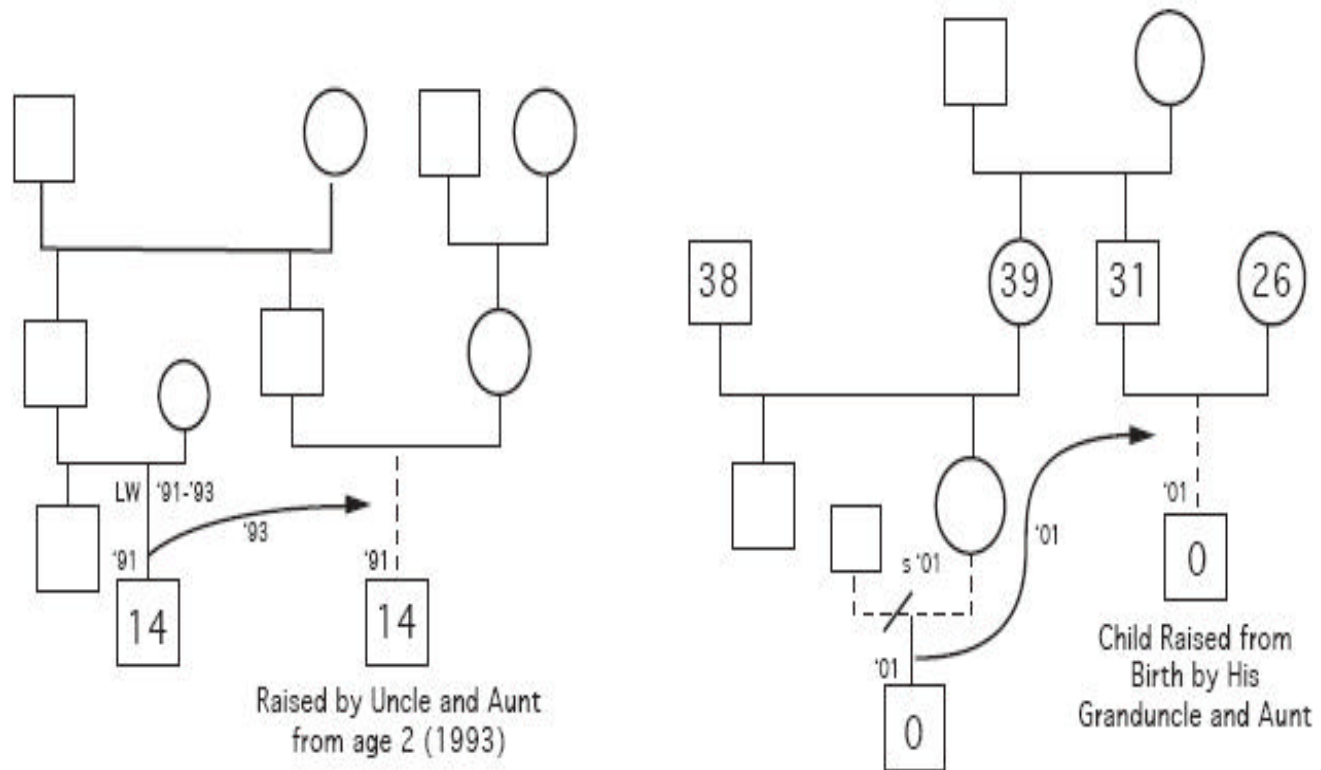


- 4 Couple living with their joint child and her child from a previous relationship. The other spouses of the partners are shown smaller and lower on either side of the present household, indicated by a dotted line.





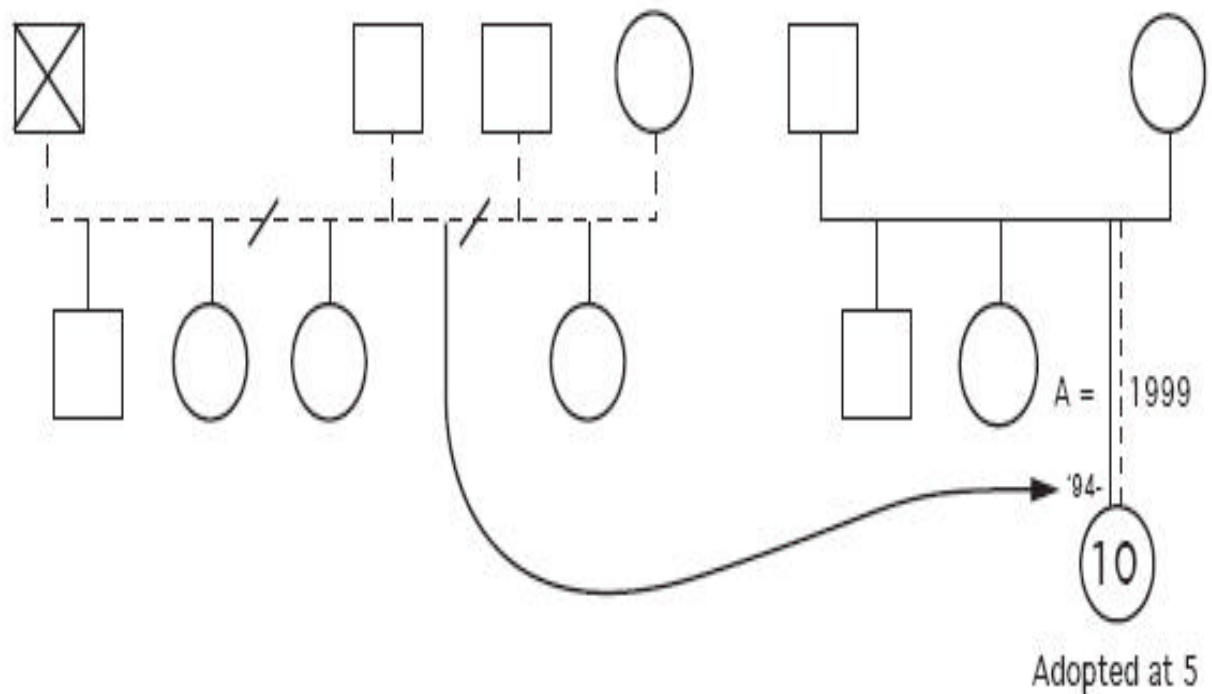
Foster Children



Use an arrow to show family into which child moved



Adopted Child



Use an arrow to show family into which child moved



Genogram Guidelines

- ✓ Baseline statement example: “In order to help design a philanthropic plan for your family I would like to do a genogram”. “A genogram helps elicit potential values for giving”.
- ✓ Gather basic information on: age, marital status, children, parents, siblings, etc.
- ✓ Additional information: educational levels, occupations of family members
- ✓ Wealth status, legal issues, conflicts over money, philanthropic values



Genogram Guidelines

- ✔ Use the basic informational questions as a starting point for finding out more about family relationships regarding money and philanthropy
- ✔ Relationship questions: “What term(s) would best describe you in relationship to money? Spender, Saver, Worrier, Avoider?”
- ✔ How have your family values around money affected you?
- ✔ What values do you want your children to regarding money
Regarding philanthropy and service?



Genogram Guidelines

- ✔ Repeat the question regarding other important people in the donor's genogram. Look for patterns. How are they different or similar to other family members?
- ✔ Genogram sessions usually last one – three hours and may take more than one session to complete
- ✔ Sometimes genograms elicit unexpected emotions
- ✔ Alternatives for handling unexpected emotions:
 - ✔ If appropriate allow the donor to vent the emotion
 - ✔ Reframe the situation – remind donor of family strengths
 - ✔ Refocus on donor's vision of philanthropy



Guidelines – Couples and Families

- ✓ Start with the donor and do the series of questions
- ✓ Repeat the questions with the spouse
- ✓ Follow the same structure with adult children
- ✓ Let members know the format before you begin



Guidelines – Blended Families

- ✔ Donor desires to include children and/or ex-spouse in the sessions
- ✔ Caution: current spouse is uncomfortable with this
- ✔ Suggest separate meeting with donor and children/ex-spouse
- ✔ With donor's permission offer to review the results of the meeting with children at the next meeting with donor and current spouse



Genogram Analysis

- ✔ *Family Dynamics*: What are the patterns of communication (alliances, conflicts, triangles) from generation to generation?
- ✔ *Family Culture*: What are important norms of behavior (traditions, legacies, values)
- ✔ *Family Communication*: What impact does open/closed, positive vs. conflictual communication have on the family's philanthropy?
- ✔ *Political Dynamics*: What are the hierarchies of status (generation, gender, age, role, wealth)?

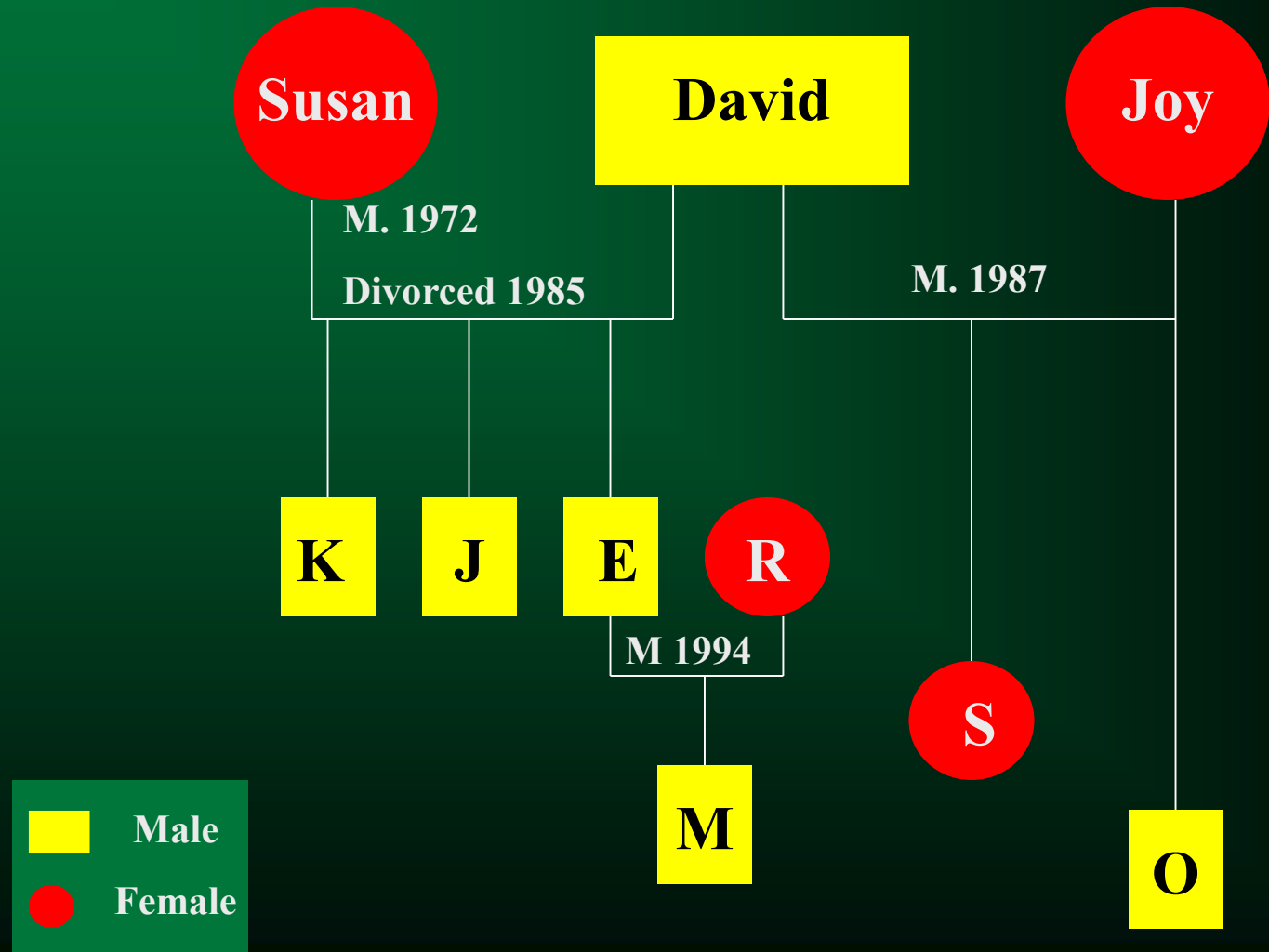


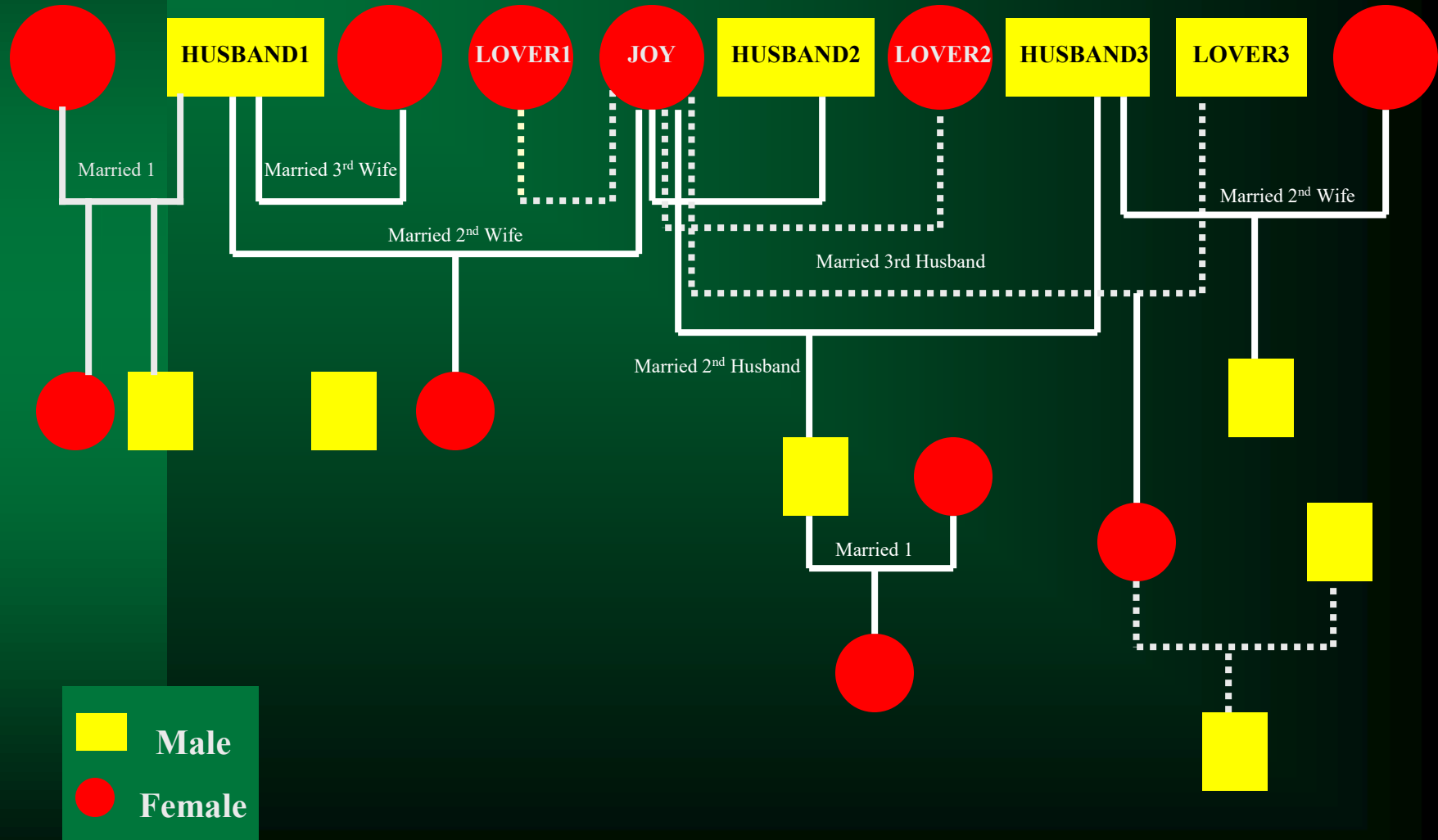
Upon Completion of Genogram

- ✓ Revisit the questions....
- ✓ What is really important to the family?
- ✓ What are your family's true assets?
- ✓ How can you support a member's life journey?
- ✓ What responsibility you have to society?
- ✓ What has the genogram added to your mission of philanthropy?



Blended Family







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