At this year’s Laird Norton Family Summit, held in June, close to 300 members of the family that owns Laird Norton Company LLC gathered in San Diego—far from the diversified holding company’s Seattle headquarters. They heard how the company is doing. They also learned from family president Allison Parks about family members’ service to the company and philanthropic contributions in the past year.

Family members also had a chance to volunteer together, building doghouses for the Humane Society and putting together bikes for homeless youth. The World War II veterans in the family led a group to visit the USS Midway aircraft carrier.

“We have family members that come from all over the country as well as internationally,” Parks says. “Providing ample time for them to truly connect is one important goal of our gathering.”

Family meetings like Laird Norton’s, which combines service, bonding, business and fun, help family members make memories together in addition to serving as a forum for discussion of key issues.

Many large families refer to their extended family group—including spouses, young children and other family members who may not hold shares in the business—as the “family assembly.” Family assembly meetings are often held annually.

“The special challenge in family meetings is that you have family roles in addition to business roles,” says Pat Armstrong, senior director of Family Dynamics and Education at Abbot Downing, a unit of Wells Fargo that serves ultra-high-net-worth clients. “You have siblings and cousins who have relationships that they established growing up, who are now talking about business issues and financial issues together.”

Family meetings are essential for large, far-flung clans like the Laird Norton family, which is now in its seventh generation and has a total of more than 400 members. But even smaller families have found it beneficial to bring everyone together to discuss business and family issues and share quality time.
"The family business is the most complex organization you can have, because it's a business organization and a personal family," says Dennis T. Jaffe, a family business adviser and a professor emeritus at Saybrook University. "There are so many ways to misunderstand each other. A family business can't afford not to sit down and talk and make agreements."

Family business owners and advisers with experience in planning and running family meetings offer some tips that will help make your gathering a success:

1. Set goals.
A family meeting should have goals, an agenda and a focus. Little will get accomplished if the plan is simply, "We're going to talk and see what comes up," Jaffe cautions.

According to Armstrong, many families develop their meetings with the following objectives in mind:
- **Communication:** to inform the larger family group about what is going on in the business.
- **Education:** to provide information that will help family members be more effective stewards of the business and foster pride in the family legacy.
- **Decision making:** to reach consensus on matters that affect the family and its relationship to the business.
- **Connection:** to allow family members to get to know each other better—especially important for large families whose members don't live near each other, or in cases where a generational transfer is coming up.
- **Leadership development:** to prepare family members to take on larger roles in the family or the business.

At Carriere Family Farms, which grows and processes walnuts and also grows other crops in California's Northern Sacramento Valley, the goal of the family assembly meeting is "communication and inclusiveness," says Jennifer Carriere-La Duke, grower relations manager. Carriere-La Duke, one of nine family members working in the business, also serves on the family council, which is the liaison between the board of directors and the more than 80 family members.

"When challenges potentially arise in the future, we will have the tools to be able to talk about it" because of the progress made in the family meetings, Carriere-La Duke says.

Many families combine fun activities with the business aspects of the meeting. The Smith family's meetings are "a combination family reunion, shareholder meeting and conference," according to Nick Shepard, the Smith Family Council's communications director and vice chair. For example, last year the family went on a sunset cruise on the Chicago River, which provided time for family members to catch up as well as to chat with some of the company executives.

Shepard helps organize meetings for more than 200 family members, about 130 of whom are shareholders in the family's packaging, logistics and marketing enterprise, Menasha Corporation. In addition to the shareholder meeting, "we really try to get the family to be educated about the business," Shepard says.

Family meetings can provide a forum for resolving problems—but even better is to use them for proactive communication so that minor disagreements don't turn into full-blown conflicts.

For Jo Anne Allen, trustee of the David W. Allen 1989 Trust, a management and property development company in the San Francisco Bay area, family meetings began after a crisis: her father's unexpected death in 1997. "There was no succession plan," Allen recalls. She and her six siblings were thrown into how to work everything out. There was a lot of pain and contention."

The family meetings started out as therapy, "the process of trying to come current with each other as adults," Allen says. "We learned how to communicate. Then, slowly, we began to work with business professionals who helped us also or-

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**Above:** Camp Carriere is an annual camp for the kids in the family to learn about Carriere Family Farms and get to know their cousins better. Here, the campers learn how walnut trees are planted and farmed.

**Left and below:** The Carriere Family Farms annual family assembly meeting updates the extended family on business activities and issues.
ganize our business. Slowly, over time, we got more help that was directly to do with succession, creating a family council and the first stages of a real succession plan.”

The Smith Family Council was formed at a time when family members were at odds over the future of the business, according to Shepard. Among the early objectives for the family council, he says, was “how to make ‘family’ into something that was positive rather than divisive.”

Thanks to the establishment of the council and the family meetings it has organized—combined with the strong performance of company in the past decade—the family has been growing closer and learning to work together, Shepard reports.

“The family gatherings became more formalized and more regular, with a lot of education and consultants coming in,” Shepard says. “We’ve tried to spend a lot of time getting family members to socialize with each other. We have bought into this idea of the family’s relationship to the company not necessarily being one of constant oversight but as a supporting entity.”

2. Plan and prepare.

It’s crucial to invest time and effort in preparing for the meeting. “You don’t want to have people on the spot or surprised in the meeting itself,” Armstrong cautions. “Have individual conversations in advance and review the preliminary agenda. Ask about any concerns [the agenda] should be sure to cover. Spend 80% of your time on pre-work so that the 20% of the time in the room together feels really productive.”

“Every family should have a feel of the emotional intelligence of the family, as well as if there are any underlying issues—elephants in the room that have never been dealt with,” says Barbara Quasius, chief financial officer of Windway Capital Corp., a holding company owned by family trusts for Terry Kohler and family. Quasius is a non-family member, but her job includes being a liaison with the Kohler family’s 13 members, only one of whom (chairman and CEO Terry Kohler) works for the company. “Some families are very close and see each other all the time. Others are dispersed and don’t know each other very well,” Quasius points out. “Those are the different dynamics that can come into the meeting room.”

One agenda item for an early meeting: establishing ground rules. “Spend the early part of the meeting identifying what the rules are going to be, such as not talking over each other or how someone calls for a time out if there needs to be a break,” Armstrong advises. “Depending on the family culture, the ground rules will all look a little bit different, but spending time early in the process establishing those is important.”

At Carriere Family Farms, having a detailed agenda—and a timekeeper to keep everything on track—has helped make the meetings progress smoothly. “We went from a two-hour family assembly meeting to a one-hour meeting and designated a timekeeper,” Carriere-La Duke says. The agenda for a recent family meeting included updates on the family business, a conference that family members attended, the camp the family runs for young family members, matters that arose in a recent family council meeting and the business’s involvement with the Boys and Girls Club.

After a meeting, it’s important to assess what went well and what didn’t, and plan to adjust accordingly. “We’ve had meetings where we were trying to provide too much information in one meeting,” Quasius says.

3. Decide on logistics.

Meeting organizers must consider several logistical issues:

- **Who should attend?** This depends on your objective, Armstrong explains. “If the objective is communication or education, you might have all of the identified family members there. Maybe you carve out a meeting for decision making that is just for shareholders.”

  The key, Armstrong says, is to be sure you don’t have attendees wondering why they’re there or asking, “Why is this person here? They shouldn’t be part of this decision-making process.”

  Another question involves whether there should be age restrictions. For example, a family may want teenagers to attend at least part of the business meeting, so they can begin to learn about the business. Organizers may need to consider the logistics of babysitting for younger children while the adults attend business meetings.

  Some families create special activities for younger children that take place while the business meeting is going on. For example, the Laird Norton Family Summit provides educational events and a fun day camp for school-age children that are scheduled concurrently with mandatory business sessions, enabling the parents to participate in the mandatory meetings. Other benefits: The young cousins who attend the camp are developing close ties, and the program helped boost attendance at the family summit—children push their parents to attend the meeting because they want to go to camp.

  Laird Norton had about 80 children at its camp last year; Parks says. At age 14, children have to start attending the mandatory business meetings, but they can continue in a teen program the rest of the time. The camp has been run for more than 20 years, so the early attendees are now adults.
“It’s established fantastic social bonding with these kids,” Parks says. “We can really see the fruits of our labor.”

• **How often should meetings be held?** “Frequency derives from your objectives,” Armstrong advises. When family gatherings are just starting and you’re still trying to establish ground rules and do strategic planning, more frequent meetings may be helpful. If family members are geographically scattered, annual meetings may be most practical.

• **Where should meetings be held?** Generally speaking, a neutral location such as a hotel conference room is better than convening a family meeting at someone’s home, Armstrong says.

For Laird Norton, a key consideration is finding a venue in an enticing location that can accommodate almost 300 people.

“As we have a bigger generation in the workforce with limited vacation time, we have to make the annual meeting as attractive as possible,” Parks says. “We have seen through the years what a powerful opportunity we have to connect with each other, and the business, through intentional connection, education and service.”

Shepard says the Smith family has traditionally gathered in Wisconsin, near Menasha’s Neenah, Wis., headquarters. That has made it convenient for company executives who are asked to address the family group.

“I think the reason we go back is a little bit of nostalgia, but primarily it’s easier for the business to stay there than for them to pack up and go off to Hawaii,” he says. Cost is also a barrier to holding the family meeting in a more exotic location, he adds.

However, Shepard says, because the family is now more spread out geographically, alternative locations have been proposed. The 2014 Smith family meeting was held in Chicago; the family will go to Elkhart Lake, Wis., this year. “There’s a balancing act between how to get people there and make it feel like a vacation, as well as something that works for the business,” he says.

• **Who pays?** Laird Norton covers the cost of family meeting attendance for all unit holders, Parks says. In return, participants must attend two mandatory sessions at the meeting.

Jaffe points out that for families who hold their meetings in locations where air travel is needed for most participants, costs could be quite high—possibly in the millions of dollars if the family is large. On the other hand, covering attendees’ travel expenses results in increased attendance and makes it more likely that the meeting will meet its objectives.

• **Do you need an outside facilitator?** Families just beginning to institute family meetings might want to enlist a third-party facilitator to ensure everyone’s voice is heard. And of course, a facilitator will likely be helpful if a difficult topic—such as a conflict among siblings—is on the agenda.

Consider the complexity of the business and the size of the family, in addition to how well family members get along, Jaffe says. “The more argument and conflict and anger that you sense, and the more complexity, the more you need an outside person to help you run the meeting.”

**Taking the plunge**

Planning a meeting may seem complicated, but don’t be afraid to move forward. One of the biggest mistakes families make is putting off scheduling a meeting “because they’re anxious about what will happen rather than seeing what they can do to prepare for it,” Jaffe says.

Planning fun activities to complement the business agenda strengthens family bonds. Programming that emphasizes the family values and history fosters family pride. Members of succeeding generations who have fun together and are proud of their legacy will want to continue in business together.

“At every one of our family meetings,” says Laird Norton’s Allison Parks, “while we are there for business and we take that seriously, we are absolutely committed to having fun and making time for connections.”

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