

Family Meetings

1. Setting a purpose.

What is the reason for the meeting?

Examples:

*Mom isn't safe in her home. What are our options?
Dad needs assistance with paying bills and managing cash flow. How can we help?*

2. Inviting participants.

It is helpful to invite all family members to promote healthy communication.

Does the elder need/want to be included?

Examples:

*Brother is unresponsive, but appreciates the invitation to join the meeting.
Siblings who are out of town participate through via telephone/video conferencing.*

3. Choosing a meeting leader.

Who is willing and is the right fit to run this particular meeting?

Examples:

*A coach, mediator, attorney or other trusted advisor facilitates a discussion between
family members about the options available.
The primary caregiver runs a meeting with her siblings about Mom's escalating needs.
A doctor leads a discussion of medical options after a stroke.*

4. Limit duration to 1-2 hours

These topics can often be overwhelming to attendees. It is natural for everyone to want to share their feelings. It is important to keep each phase of the meeting brief to maximize the use of the time.

5. Meeting Agenda:

This is a sample, which may be modified to suit the needs of your family.

- a. State the purpose
- b. Establish ground rules:
 - i. Respect for others
 - ii. Openness to different opinions
 - iii. Welcome questions
- c. Share the story-keep it brief
- d. Describe options available
- e. Summarize the progress made, decisions reached and tasks assigned

6. Establish next point of contact for all attendees.

What are the next steps?

Examples:

A date is selected for the next meeting.

An attendee agrees to send all family members a follow-up email.

7. Thank participants for attending.

It may take a lot of energy to show up for a family meeting, even if it doesn't appear

so from the outside.

Example:

After being thanked, each attendee feels that their time was honored.

The meeting was emotionally difficult for one brother, but he appreciates that his effort to attend was acknowledged.

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