

Checklist for arranging family meetings

1. Getting agreement

Reluctance from some family members is often due to their lack of clarity about the meeting process. Many families have found that watching the video Talking families in business often overcomes individuals' concerns. The second half of the video snapshots a family meeting.

2. Booking your facilitator

Aim to choose a facilitator everyone is comfortable with. Things to consider include:

- what have you heard about them?
- is there any alliance - real or perceived?
- do they have professional indemnity?
- are they professional?
- do they have any quality assurance measures in place?
- what training or experience do they bring to the job?
- what training or experience do they bring to your family and business?

3. Book your accountant

You will need to include a professional who understands the business side of the family business. An important part of the facilitated family meeting process is to balance the needs of the family and the needs of the business - therefore these meetings work best with two external people. The facilitator provides expertise in getting people to talk openly and the second person provides the business expertise. This might be your accountant, consultant, or rural financial counsellor.

4. Recording the meeting

It is crucial to have a written record of the meeting. It is best to have an agreement about who will do this before the meeting - the accountant/financial counsellor might be able to do it, or another impartial person who is not involved in the meeting process could be asked to attend in order to record the meeting.

5. Arrange a suitable venue for the meeting

It is important to hold the meeting in neutral venue. This minimises distractions and maximises the opportunity for family members to contribute. The venue should have a large table to seat everyone, preferably one that is rectangular rather than square in shape. Meetings sometimes continue until after 5pm so it is important to ensure that the venue can accommodate this.

6. Who should attend

We encourage all members of the family, including in-laws to attend. Experience and feedback from families indicates that when family members are not included (ie off-farm children) they feel excluded, possibly upset and relationships can be damaged as a result. The inclusion of off-farm children is very useful as they often bring a different perspective to those involved in the day-to-day running of the business. Some families might choose not to include in-laws.

