



FAMILY MINDSETS: UPSHIFTING THROUGH STAGES OF FAMILY DEVELOPMENT

By Matthew Wesley

Research shows that families have different mindsets. Understanding the dynamics of these mindsets is critical to family development. Indeed, how effectively a family functions together and in the world is often constrained by its collective mindset. Moving into higher stages of family development becomes critical for long-term family success.

We typically see families “upshifting” through five basic mindsets or “gears of development.” These shifts are often a function of greater competency and deeper alignment. These developmental shifts become path of a particular kind of evolution that allows families to sustain inter-generational success. This success, which is broadly defined to be more than merely financial, sets the stage for the collective family and individual family members to create much deeper forms of significance and connection.

The Gears

Gear 1: Entangled

Typically a family in this stage has a strong figure that holds the family together and ensures that it is moving forward. Often this person is a first generation wealth creator. People in the family often define themselves - either by identification or differentiation - in relationship to this powerful figure. This situation can actually be quite positive in building strong, capable people if handled wisely, but it can also be destructive to long-term individuation and the independent success of the members of the family. Often this central person defines values and serves to focus the energy and efforts of the family. The danger, of course, is that when this person is gone, the family has lost its “glue”. Often families that have not transcended this mindset fall apart when the last of the powerful matriarchs or patriarchs passes on. Moving into higher gears is absolutely essential to longer term family success. These families need help in transitioning to healthy individuation while not losing a sense of collective identity.

Gear 2: Separated

Typically the separated family is a collection of individuals. Most often they are not in strong reaction to each other but they are not deeply engaged with each other either. They individually each seek their own way in the world on paths that make sense for them as individuals. These families are often not geographically close and sometimes are not emotionally close. Family gatherings are often infrequent and difficult to arrange. Separation may be offset by long-distance communication by phone and forms of virtual communication. These families often need help sustaining vital family connection and with the

planting the seeds for longer term vision and family development so that they will be ready to transition into gear 3.

Gear 3: Gathering

Families in Gear 3 typically recognize that complexity of family assets and realize that there is a real need for more intentional and focused communication. There is recognition that there is simply too much at stake to leave things to chance. Often there are one or two people in the family with this vision of developing a deeper, more intentional approach. These people see the need to continue to foster individuality, but also recognize that maximizing the potential of each individual requires greater family cohesion. Robust family meetings often begin in this stage, though many families are uncertain how best to proceed to create the kinds of experiences that will accomplish the felt need for vision and coherent action. These families often need help in developing communication patterns, polarity management, understanding sustainable wealth paradigms, and the dynamics of family systems.

Gear 4: Flowing

Families operating in Gear 4 find that they are learning a great deal about how to be a family that is characterized by sustainable and generative collective relationships. The family is typically beginning to operate in strategic ways around both business and philanthropy. Conflicts surface but are usually resolved in an atmosphere of open and generally compassionate dialog. Individuals are pursuing their dreams with the support of the family as whole. Family members with problems are supported without being inappropriately coddled. In the same way, individuals are contributing time and effort to the good of the extended family. When done well, philanthropy becomes an integrating connection in these families. These families typically need help with roadmaps, inclusion and efficiency.

Gear 5: Excelling

Families running in Gear 5 are making a difference in the world and are measuring their impact in multi-generational time frames. They are intentionally planting the seeds for unborn generations and often look back on rich family traditions. People from these families tend to be leaders in their professions, in politics, in business, in the arts, and in philanthropy. Family summits are annual occasions of real personal and collective growth, deep governance and real connection. Families in this gear are actively and skillfully managing human, social, cultural and financial capital in high impact ways. These families typically need help in managing the complexity of multi-generational processes that ensure long term continuity.

Upshifting

Helping families move through these levels of increasing competency and complexity involves addressing various polarities or tensions between the competing impulses we all face. Families wrestle with such tensions as individuality and togetherness, emotions and reason, responsibility and autonomy, and so on. As families move through various stages of their development, they become increasingly competent at resolving these inherent tensions. They learn how to be a single collective comprised of unique individuals and do so with increasing ease and flexibility. This expanding skill set allows them to aspire to far better and more ambitious outcomes that were simply not possible in the mindsets that came before. Consequently, this gearing-up brings with it a greater range of possibilities for the family as a whole.

Upshifting through the gears is a process that requires skill and understanding. Critical to this is the operative frame of reference or set of maps for effectively moving through these gears. While there are many models, techniques and skills necessary to facilitate communication and understand individuals, the family that seeks to upshift must keep a lot of moving balls in the air for this process to be successful.

Most importantly, the family has to be able to work with the external and internal realities of both individuals in the family and family as a whole. For individuals, the capacity to upshift depends on the internal experience and behaviors of individual members of the family. The psychological challenges of individuals within the family center on questions of their own development, motivations and commitments, among other things. Externally, individuals must master particular skills and competencies and navigate the unique contours of family engagement, the collective must build and sustain external structures, networks, and processes while also paying attention to embracing its shared worldview, values, and purpose to ensure aligned action.

Success in building a multi-generational family involves significant focus in a balanced way on both internal dynamics and external realities. It also requires the adoption of practices necessary to manage this balance in intentional and focused ways. Techniques and skill sets exist to foster this balanced growth and it is in this balanced growth that families come to realize their full potential. Managing this degree of complexity may require the assistance of outside consultants who have a deep understanding these dynamics and the ability to facilitate family growth and transition through these mindsets.

Matthew Wesley is the founder of The Wesley Group. He graduated from Stanford Law School and practiced as an estate planning attorney with successful families for over 20 years. Matt left active practice to help families do what estate documents alone could not - help to ensure successful intergenerational wealth transfer. In addition to his legal background, Matt has extensive consulting experience and a deep background in psychology, personal development and family systems, and organizational communication and development. Matt works closely with his wife, Marcia, who is a licensed psychologist with over 20 years of counseling experience.

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