

# ST. LOUIS TRUST

## *& Family Office*

### I Loved My Family Reunion

Who knew that a family reunion could be so much fun? I sure didn't when my extended family – numbering 33 strong – descended on a boutique ranch outside of Sonoma, California earlier this summer for a three-day family gathering. Initially, I was skeptical, but the experience turned out to be fantastic, and we are all looking forward to doing it again.

First, a bit of family background. I come from a family of four kids raised in St. Louis, and I am the only sibling that still lives there. We did not have a tradition of family reunions while growing up. We like each other a lot, enjoy spending time together – including occasional family vacations – and love to catch up once or twice a year in person or by phone. Family weddings or graduations have been another time to gather. With my siblings and their kids now living all over the U.S., we realized that our next generation would never get to know one another unless we scheduled a reunion to do just that.

Here are some thoughts on what made this so special for our family.

**Adult leadership** | The four siblings needed to be fully supportive of this from the outset to have a chance of success. Each family leader needed to rally his/her troops, communicate the importance of attendance, and generally promote the event. As appropriate, each family funded some or all of the cost of the travel, lodging, and car rentals involved. Gatherings like this are not inexpensive. Being up-front as to how costs will be handled and being mindful of the costs during the planning process are both essential so there are no unpleasant surprises at the end.

**Timing** | Our reunion was scheduled nearly two years in advance. Unlike a wedding or funeral where timing is up to the preference of a young couple or the fates, the main consideration of scheduling a reunion is to maximize attendance and must therefore be accommodating to the family as a whole. In our case, my generation was queried as to times of year that might work, and then we agreed on a date that fit most schedules. No date is ever perfect but reserving a time on everyone's calendar far in advance is essential to ensuring maximum participation.

**Location** | Finding a suitable venue for an event like this is critical. We needed a destination that would entice the different tastes, sensibilities, and yearnings of all three generations involved. It also needed to be convenient to get to for the largest number of participants – not an easy task. In our case, the ranch in Sonoma fit the bill perfectly. It is regularly used as a retreat for small business groups and not-for-profit leadership events and came complete with a beautiful setting, large swimming pool, hot tub, family dining, adequate sleeping accommodations, and plenty of on-site activities for all age groups. The pool and related activities were especially important for the youngest family members. Plus, the excellent food satisfied our foodie millennials and the older generation alike, and the premium selection of local wines was a bonus.

**Activities** | Most importantly, our itinerary—other than meals—was almost completely unstructured. Many of us exercised on our own before breakfast, but after that, we mostly sat around the pool, read,

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played with the kids (ping pong was popular), and chatted about what was going on in our lives. The first cousins' generation clearly enjoyed talking to one another and sharing their life and business career experiences. It was especially fun for the elders to eavesdrop on those conversations!

We had a lot of young grandkids in the group, so this plan worked well. As they age, some group activities such as hikes or organized sports might be appropriate, but it is important to leave plenty of time to do absolutely nothing but enjoy each other's company.



**Who Attends** | The key is to have as many family members as possible attend. This includes all spouses and significant others. Divorcees were not considered.

**Pay in Advance** | Having the “leader” of each extended family pay in advance for the cost of lodging and meals not only increases the likelihood of attendance by all, but it also creates a moral imperative to attend as competing events inevitably come in conflict as the reunion date approaches.

**Mix Everyone Up** | An effort was made to mix up the families from the outset. Sleeping accommodations were assigned by generation and age, not by family. Likewise, all meals were served “family style,” and everyone moved around to various tables for each meal. The kids, of

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course, preferred to sit with each other and not the older folks. If the goal for the reunion is to keep the younger generations close, then this is ideal.

**Family Presentations** | One event that was pre-scheduled was an after-dinner surprise presentation by pre-selected family members followed by a bonfire and marshmallow roast. For us, this included a slide presentation and talk from my son, a quasi-professional photo journalist, who had been touring National Parks for two years. He concentrated his remarks on the lesser known parks and their attributes. Another cousin put together a slide show and soundtrack featuring past family gatherings. He brought the house down when it became clear that he had edited out participants in past events who are no longer considered family. (Every family has a few of those, and we are no exception.)

Having a session like this can be a great vehicle for drawing everyone together, especially the youngest in the group. It also engages and showcases second-generation family members who can serve as role models for the younger kids. This needs to be planned in advance and kept as informal as possible. Only two or three presentations were needed for it to be a success. The bonfire (with wine) was also quite popular.

**Next Reunion?** | This reunion was so successful that at the final breakfast together there was a lot of chatter about the where the next reunion should be held, when it should be scheduled, etc. Several suggested next year, but we decided not to ruin a great thing by overdoing it. Every two to three years is the right frequency—in that time frame a lot will have changed in everyone’s lives, so there will be plenty to talk about and look forward to.

**The Family Champion\*** | I have intentionally saved the most important ingredient for success for last. Who plans all this? Who gets the ball rolling and coordinates all the details with all the family members? Who polls everyone about ideal dates? Who selects the venue? Who arranges all of the rooms, meals, activities, etc.? Who takes charge of the cost of the event? Who plans the family presentations? Who handles the complaints?

In our family’s case, it was my niece, Annie Burke, the daughter of my oldest brother who lives in Berkeley, California. She is an organizer and connector at heart, and, fortunately, she is great at it. It was all her idea to have this reunion so her kids could get to know the other cousins (many of whom are around the same age). She led the charge at every stage and did a flawless job. Without Annie, our reunion would never have happened or been such a smashing success.

In the world of family business, an individual who takes on the role that Annie did is referred to as a “Family Champion.” This is an individual that believes in the importance of family history, connections, and legacy. It is most often a self-appointed role undertaken for the love of family. Having a family champion will assure a successful experience.

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I hope you have a family reunion in your future, and that the Burke experience is some help to you. Trust us, it is 100% worth the time, expense, and energy. (That is, as long as you like your family!)

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*\*This term was first introduced in the field by Professor Joshua Nacht in 2015.*

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