

Deborah Herrera

November 19, 2019

Case Study



Convening a subset of the Herrera Family:
Bill, Deb and Cindy

Next Steps in Executing Final Wishes





Background

My maternal Grandmother's wish upon her death was for the family home to be passed to my Mom. Upon my Mom's death, my Dad would have lifetime occupancy rights and then the house would pass on to my sister and me.

It is unclear what official documents exist regarding the wishes noted above. We are a family that does not talk about money or many other tough subjects.

My Mom passed away three years ago. A few months ago, my Dad made a passing comment indicating he assumed neither my sister nor I would want the house.

My sister and I actually do want the house. However, if my Dad needed to sell the house for financial reasons we would support that without question. What we do not want is for this house to pass to someone other than my Dad or the two of us.



Aspect I: At the Heart of the Matter

OUTER

Core Purpose:

Open a dialogue around next steps regarding my Mom's last wishes and my Dad's intentions related to the family home.

Outcomes and Expectations:

- Listen to and understand desires and intentions
- Listen to and understand concerns
- Agree to next steps and individual commitments
- Be clear on the love and respect we have for one another

INNER

I am love, compassion, grace, empathy, allowing, respect, and listening.

I am a daughter who deeply loves and respects her father and wishes to honor her mother's wishes.

I am a sister who adores her younger sister and wants to help navigate this situation.

Most importantly, I am a member of this beautiful (and still grieving) family.



Aspect II: Clarifying Intent

OUTER

What is the intent of the meeting?

Collectively develop a shared understanding of my Dad's intentions for the house.

Understand what my Dad needs to make these intentions a reality.

Clarify my sister's and my desire to take responsibility for the house when the time comes.

Determine what the legal documents exist today and what next steps we need to take to ensure the above wishes are documented and protected.

INNER

Who am I?

A daughter and sister who loves her family and wants to honor her parents.

What are we to do together?

We will open a dialogue about legacy and honoring the wishes of not only my Grandmother and my Mom but also the three of us.

We will create an example for a new level of openness between the three of us.

We will be clear about our wishes, the love and respect we have for one another and the steps we agree to take as a result.



Aspect III: The Invitation

OUTER

Who will I invite?

My Dad & my sister

The invitation will be made verbally and at a time when my Dad is open to and ready for such a conversation

Why will they attend:

- We love each other very much
- It is something we all want to resolve (I think)
- My Dad is getting older and we need to talk about these things.
- This is an opening for other powerful conversations as a family
- No regrets; nothing left unsaid

INNER

What is my sincere gesture(s) that integrates my purpose and intent?

- It is just a house. And certainly not more important than my relationship with my Dad
- Individual conversations broaching the subject prior to the verbal invitation
- I will have a picture in my mind of them and how I hold them in my heart before extending the invitation as well as before the actual meeting



Aspect IV: Setting Context

OUTER

How will you describe the form, function and purpose of the meeting once the meeting has begun?

I will share the reason we are together: to talk about the house, understand each person's intentions / wishes, talk about what my Dad needs in terms of support, and agree on next steps.

Open dialogue, honest discussion, facilitate deeper questions

INNER

What is my clear articulation of who we are to be and do together?

"It has been three years since Mom died. We have never talked about the realities of this house, Dad's wishes and the steps we need to take to ensure these wishes are carried out. I would love for us to get clear on that as well as what we need to do together to follow through."

- I will be clear in my intentions
- I will be open and honest and vulnerable
- I will be a model of love, respect, and grace



Aspect V: Creating the Container

OUTER

Space

Ideally we would be in person, in the home in Marquette, Michigan

Just the three of us

Option 1: Sitting in the living room or kitchen in a comfortable and familiar setting

Option 2: We would take a walk along the shores of Lake Superior, walking or sitting in chairs in the sand

Norms

Every voice matters

This is a space of love and respect

We leave this time together as a family not individuals

INNER

What is my role?

- To model openness, listening, grace and compassion
- Deep listening
- Foster love, sincerity, curiosity, compassion, and respect
- Facilitate next steps and commitments



Aspect VI: Hearing All the Voices

OUTER

How will I facilitate each person to speak? What methods and practices will allow for the full expression of all participants?

- Listen without interruption
- Ask curious questions to ensure each of us has a chance to process and speak
- Honor the silence
- Ask “what do you think” or similar questions if one or more is silent

INNER

Who are we and what have we come to say and do together?

We are a family who loves and respects one another.

We are also parent and child; sibling; adults. Family dynamics and roles and expectations my come up.

We have come to this place to honor and respect my Dad and to understand what he wants.

We are also here to be clear about what Cindy & I would like and how we are prepared to help.

This is the type of topic we don't discuss so it may be hard for each of us to speak from the heart and express what we truly want.



Aspect VII: Essential Conversation

OUTER

What are the success factors for a fully engaged meeting? What needs to be in place for full engagement and how will you know when it occurs?

- Intimate, familiar space where all three of us feel comfortable and able to speak freely. No distractions.
- Just the three of us are present.
- Demonstrated honesty, love, respect
- Open and honest dialogue
- Asking questions – “Dad, what do you want / need?” “How can we help?” “What is important to you?” “When would you like us to begin sharing the financial responsibilities?”
- We feel free to give honest answers without fear of resentment or fracturing relationships
- Honest, cohesive and actionable commitments from each of us coming out of this experience.

INNER

Has the ground been adequately laid for essential conversation to occur? What wisdom am I looking for and is already present?

Honestly, I don't know.

There are probably a couple conversations I need to have with my Dad before this one.

I also need to have a conversation with my sister about willingness and ability to shoulder future financial responsibilities related to the house.

My Dad is an amazing man. We are daughters who deeply love and respect our Dad.

I want my Dad to have the beautiful life he deserves in the manner he wants it.



Aspect VIII: Creation

OUTER

What do I wish to create?

An open and safe space for us to have this and future conversations.

An open dialogue on this issue.

All voices heard. Clarity on what each of us wants / needs.

A pathway forward.

Agreement on how to move forward including next steps.

Create a closer sense of family and an opening for future conversation about...anything.

INNER

What are we to create together and how will I recognize and harvest the wisdom being created?

- A safe space
- Clarity without resentment
- More cohesive family who is clear on what each of us wants and is committing to
- An opening for courageous and honest conversation

How to harvest

- Listening beyond the words
- It's just a house

Aspect IX: Commitment to Action



OUTER

Commitments (All):

- Honesty
- Clarity
- Accountability
- Follow through

Commitments (Myself):

- Confirm/clarify
- Follow up
- Be available to assist my Dad through next steps if helpful
- Foster more conversations
- Be honest and open

INNER

What is needed to allow for the highest level of commitment and responsibility and accountability to occur?

- Safe space free from judgment
- Understand the real issue/concern before moving on
- Love and respect
- Clear commitments / expectations
- Shared belief that
 - “We’re in this together”
 - “We all have positive intentions as we move forward”

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THANK YOU

