

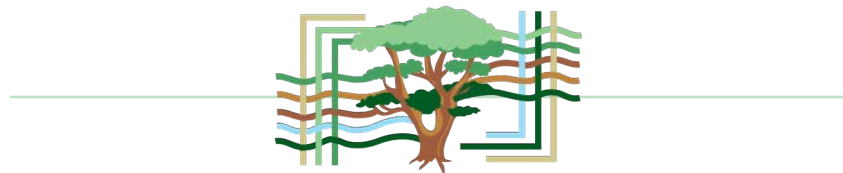
On the Way to Canterbury: A Journey to Discover and Develop Human Capital



In the late 1970's, James "Jay" Hughes (Esq.) was experiencing an existential crisis, of sorts. Despite providing his clients with excellent legal advice, he felt his work lacked meaning. It was simply a service that left him feeling dissatisfied. The crux of the problem was in his desire to improve peoples' lives rather than simply sustain their financial capital. As he wrestled with how to change course, a friend suggested the book *Zen Mind, A Beginner's Mind*, by Shunryu Suzuki, which emphasizes "possibilities." This set Jay on a new path of human capital discovery and development – a path that he has invited his client-families and colleagues to walk with him on ever since.

Of course, as often happens, our journeys are changed and enriched by the people we meet along the way. As Hughes was looking for an effective way to measure human capital and identify human talent, he met Bill O'Brien. O'Brien was working on a vocational assessment program called Transitions (which later became PRO Development™ aka PRO-D™), helping individuals increase self-awareness and self-actualization. Prior to meeting Hughes, O'Brien had guided over 3,000 individuals through his Discovery Experience™. Seeing their mutual vision, they began a collaboration that has spanned almost three decades.

"Over the years, I have referred to those of us who share this vision and work toward it as 'a little band on their way to Canterbury,' a reference to the pilgrims who journeyed long distances to the shrine of Thomas Becket, seeking help with their problems," reflects Hughes. "We are travelers on an important journey with a common purpose."



Discovering a Common Purpose



As Hughes and O'Brien began discussing the potential for a process to assist families by using these resources to determine personality types and vocational callings, they developed a kinship. They agreed that though there were many assessment tools available, the Discovery Experience™ provided the depth and comprehensiveness – the qualitative resource – that Hughes was looking for. Both men believe that human capital is the most important capital for a family to understand and develop – a qualitative aspect of wealth that leads to well-being.

The question they sought to answer was:

How can we identify and nurture the unique skills and attributes of individual family members to help them thrive as a cohesive group, and stave off the common phenomenon of family wealth yielding to entropy and decay after only three or four generations?



As they grappled with this question, Hughes identified four capitals that he feels must supersede financial assets: human, intellectual, social, and spiritual (Qualitative Capitals), and how they contribute to a family's long-term success. As history teaches, focusing on financial capital (Quantitative Capital) alone will ultimately lead to failure. **Families must grow their Qualitative Capital if they want to thrive and avoid the “shirtsleeves-to-sleeves” proverb** which refers to the danger of declining family wealth across generations and how few family businesses survive to the third generation.

“The shirtsleeves-to-shirtsleeves proverb focuses on what can go wrong, which of course is always a possibility,” says O'Brien, Senior Strategic Advisor and Co-founder of Family Tapestry. “But our process is focused on a more promising dynamic – finding the value in human capital and guiding people on how to use it to their advantage.”

Developing Human Capital Through the Discovery Experience™

The contemporary result of these aspirations is the Discovery Experience™ (which has become the Family Tapestry Discovery Experience™), a comprehensive process that builds family cohesion and helps them thrive. The experience originally began with the PRO-D™ resource and has evolved to include a Reflections Survey that was specifically designed for this resource by George Gallup, Jr., founder of the Gallup Poll. By learning about a family's values, strengths, and styles, the family is building on commonalities.

Another distinctive aspect of the Discovery Experience™ is the use of metaphors to improve understanding. According to O'Brien, the language of metaphor encourages greater dialogue, which contributes to comprehension and deeper appreciation of the material and insights.

"The Discovery Experience™ works," declared O'Brien. "We know it works because we've seen the long-term results over two decades. There are other resources out there, but ours is special. It goes beyond the typical personality assessment and delves deeper into self-awareness, competencies, interests, and personalities – the qualitative side of human nature."

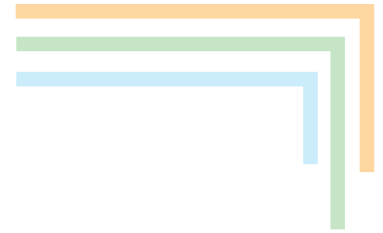
Identifying and Understanding Roles

Another key to success is helping individuals identify their unique roles in the family. Each family member plays a role in family dynamics. Over the years, roles naturally begin to change, like an organizational chart that needs to be reconfigured. Part of the process is to identify these roles through nine archetypes. The word archetype sounds like a term from a mythology book, as if something heroic is about to be explained, but it refers to a certain type of symbol. We think of symbols as things that represent something else, like an emblem, flag, or logo, but archetypes represent universal patterns of human nature – things about us we recognize as a "type." It can be a role a person plays, like a hero or mentor, or a setting (e.g., work), or a theme (e.g. struggle). An archetype is something about being human that everyone will recognize.

The Discovery Experience™ introduces nine distinct archetypes, which are the basis of this self-awareness resource. While each of us has traits of all nine archetypes, some are stronger than others. Our most prevalent traits identify what role suits us best, referred to as a "model role."

For instance, O'Brien's archetype or model role is "catalyst," one who provokes or speeds up significant change or action.

Evolving Through Experience



One of the things that has contributed to the effectiveness of the Discovery Experience™ is its evolution. Instead of remaining static, the process has been tweaked over time to become more relevant. For instance, Hughes and O'Brien added a fellow traveler to their "little band" who contributed a key component.

Tim Belber, JD, AEP®, and Principal and Founder of Alchemia met Hughes in 2000, when a colleague introduced him to Jay's self-published book Family Wealth. This led Belber to invite Hughes to work with him and another colleague, JohnA Warnick, serving a family for five years. Then, in 2006, Belber, O'Brien, and Hughes, along with other like-minded individuals, met to lay the foundation for the Collaboration for Family Flourishing (CFF). At that gathering, O'Brien asked Belber to go through the Discovery Experience™. Belber was so impressed by the results that he began referring clients to O'Brien. This resource meshed well with Belber's business of helping families think about their wealth in a more expansive way, incorporating ethics and values into long-term financial and estate plans.

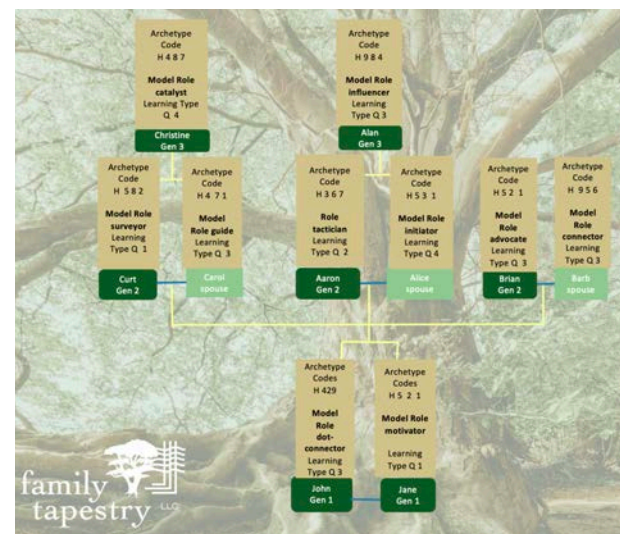
"The Discovery Experience™ yields stunning results," enthused Belber. "It has helped my clients achieve their most deeply felt goals while empowering future generations to achieve greatness."

This is best illustrated with a real-world example. Recently, Belber worked with a family celebrating 50 years of successful business. As the second generation was preparing to retire, and the third generation was stepping in, they wanted to make sure the transition was "done right." Belber felt the Discovery Experience™ would be beneficial. He also worked with one of the family members who has a design background to create a graphic representation of the roles, which is now referred to as the Family Discovery Tree™. This family tree is built from the "roots up," which, according to Belber, sends the right message.

"This graphic had such a profound effect on the family that they refer to it at every family meeting," says Belber. "It helps remind everyone of the vital roles they play and helps them stay on track."

There was no conflict within this family, but they lacked understanding regarding what the family business meant to those who are not working in it. According to Belber, the Discovery Experience™ helped them realize the importance of supporting one another and looking farther into the future when their children or grandchildren may one day be leading the family business.

"It can be an eye-opening experience for people when they realize that they still have an important role within the family, even if they are not involved in the family enterprise," explained Belber. "I think one of the most important 'capitals' is Intellectual Capital. One family member may have experience that can help another, and when they share this knowledge, everyone benefits."



Why Do Families Unravel?



For O'Brien, the interest in helping families was born of personal experience. He had witnessed his large, seemingly close family dissolve after the death of his mother. As it often happens, she was the “glue” holding the family together. You can liken it to pulling on a loose thread and then watching the rest of the fabric unravel.

Unfortunately, this is a common phenomenon. The death of a parent or grandparent can change family dynamics. In many cases there is a matriarch or patriarch who holds a family together by arranging holiday gatherings, upholding traditions, and acting as a “peacemaker” when arguments occur. When they are gone, a vital role is left unfilled unless someone is willing and able to step in and replace them. When family traditions disappear, the foundation often begins to crumble – unless a connection is maintained.

Of course, there are other reasons families begin to drift apart. They can be fragmented by financial issues, addiction, abuse, divorce, disapproval of relationships, unresolved issues, toxic behavior, and even political discourse. Sadly, the reasons are many.

However, family discord is not inevitable. If a family has a strong foundation, built on transparency and honest communication, and those all-important common threads, it can withstand attacks from both inside and outside forces. Think of it as a family fortress, which is built through a process of discovery.

How Does a Family Benefit from the Discovery Experience™ ?



A family does not need to be experiencing conflict to benefit from the process. Many of the individuals and families who seek the help of this resource are in a state of transition. For instance, one generation may be retiring and wondering if they have family members (human capital) in house or need to hire someone from outside to take on a leadership role. Some individuals are looking for guidance on their “next chapter” as they reach a turning point in their lives. And still others are worried about keeping a family together after a loss or other changes. It can help individuals think of themselves in roles that they never considered before – what O'Brien calls an “aha” moment.

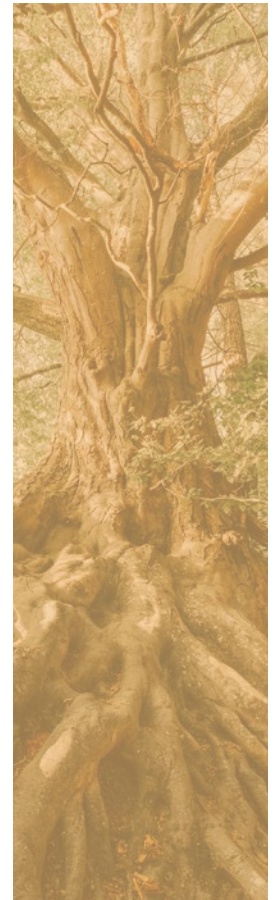
Family Tapestry also helps a family weave the insights from their individual Discovery Experiences together. Insights are like threads which are woven together until a bespoke family tapestry is revealed. In other words, it helps strengthen connections by creating a cohesive family vision and establishing a common dialogue that will enhance decision making.

The Rising Generation

According to O'Brien, working with the "next generation" is paramount to success. These are the future stakeholders and contributors to a family. For Hughes, this took on a personal meaning. His son, Will Hughes, is carrying on his father's work as a researcher and Discovery Experience™ guide at Family Tapestry. Will has a Master of Science in Clinical Counseling, which equips him to research resources for the organization and the families it serves.

"My dad likes to quote playwright Thornton Wilder, who said 'Money is like manure; it's not worth a thing unless its spread around encouraging young things to grow,'" quips Will Hughes. "Human Capital is the real wealth in families. With that in mind, I help pinpoint a family's strengths in regard to that Human Capital and offer ways for them to capitalize on those assets."

Will is also deeply committed to helping individuals, especially those in the 12-25 age group – the rising generation – engage in impactful conversations. This focus on the future is an important part of strengthening generational bonds.



The Vision

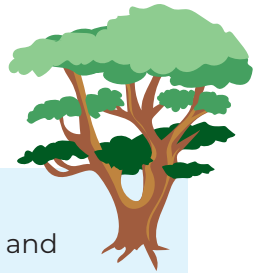
O'Brien hopes that the Family Tapestry's Discovery Experience™ will become recognized as a way to help families flourish for generations. And not just families of wealth or means, but all families.

For Bill O'Brien and Jay Hughes, who are now in their 80s, they hope to continue and grow this established legacy. Contributing to that growth is Renee Porter-Medley, who helped O'Brien establish Family Tapestry. She is effective in her model role of coordinator, serving as the Managing Director in addition to being a Discovery Experience™ Guide. With a Master of Professional Studies in Organization Development and a passion for helping families, Renee is committed to helping family members deepen their understanding of themselves and others. Her journey includes helping her own extended family of seven siblings, three daughters, and 23 nieces and nephews.

Using the language of metaphor, O'Brien says that the "baton is being passed to Renee and Will." They are keepers of the flame that Jay Hughes and the "band on the way to Canterbury ignited decades ago.

"Families are special," reflects Hughes. "In many ways they are the foundation of our society. We see Family Tapestry and the work of the James E. Hughes, Jr. Foundation as an investment in the future – a gift that will endure into forthcoming generations. We believe the willingness of families to do the work and strengthen their bonds is heroic in its own way and should be applauded."

The James E. Hughes, Jr. Foundation



The evolution of the Discovery Experience™ was achieved, in part, through the wisdom and experience of Jay Hughes, who has been a leading voice and pioneer for a more enlightened, expansive approach to assisting families around the world to flourish and see their wealth as well-being, as well as enable family offices and their advisors to better help them. He is a frequent speaker on the Five Capitals.

In 2021, the James E. Hughes, Jr. Foundation was established to honor Jay and the Hughes family lineage through educational programs and funding for advisors who are similarly called to serve families.

“Those of us who seek to help families flourish and postpone the shirtsleeves outcome for at least seven generations, attempt to find answers that work for each family,” says Hughes. “We’ve found that the direct involvement in decision making by multiple generations is key to building lasting commitment from family members and foster family cohesion.”

- Jay Hughes



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