

WORKSHEET 6 • Shared Values

Since the best philanthropy is guided by values and passions, identifying shared values among family members is an important step in your process. The following questions can help you to identify your core shared values and the relationship of those values to your charitable giving. The simplest way to use them is first as a personal reflection exercise, completed by individual family members. Next, you can come together to discuss and explore areas of commonality. Much of the benefit of this exercise comes from the shared conversation.

INDIVIDUAL REFLECTION QUESTIONS:**1. Think about two or three formative experiences in your life.**

How did they shape your core values?

2. Identify two or three people (they could be family members, other people you know or historic figures) who have been strong influences on you.

What values did they transmit to you?

3. What is important to you and what values guide the choices you make in life?

What would you consider your most important values? (If needed, see attached inventory of values.)

4. What values did your parents pass on to you? What do you think are the values common to your family?**5. How do the values you have identified speak to the kind of giver you want to be?**

WORKSHEET 6 • Family Discussion Guide

Together with other family members, share and discuss your questions on the preceding page, especially questions 3 and 4. You may want to put all family members' answers up on a piece of easel paper for clear viewing and identify values or clusters of values that seem to be shared by many in the family. Elaborate on them by sharing family stories illustrating the values.

DISCUSS THE FOLLOWING QUESTIONS:

- 1. What are your core family values? What does the family stand for? Narrow down your list to 4–6 core values.**

- 2. How do these values speak to the kind of philanthropy you want to do? The philanthropy that you want to be known for?**

- 3. Do they have implications for the kinds of organizations and causes that you want to support?**

- 4. Do they have implications for how you want to work together as a family?**

Use the answers to these questions to define your family philanthropy vision, mission, goals and approaches to working together. Continually test and refine these values as you observe the philanthropic choices that the family makes.

WORKSHEET 6 • Values Inventory

FROM THE LIST BELOW, SELECT WHAT YOU SEE AS YOUR 6 MOST IMPORTANT VALUES.

Acceptance	Fairness	Preservation
Access	Faith	Pride
Achievement	Family	Privacy
Acknowledgement	Flexibility	Respect
Adventure	Freedom	Responsibility
Agility	Generosity	Security
Arts	Happiness	Self-expression
Beauty	Harmony	Self-reliance
Change	Healing	Service
Collaboration	Honesty	Simplicity
Comfort	Humility	Stability
Commitment	Independence	Stewardship
Communication	Innovation	Tolerance
Community	Integrity	Transformation
Compassion	Interdependence	Truth
Conservation	Involvement	Wisdom
Courage	Joy	Others
Creativity	Justice	
Democracy	Knowledge	
Dignity	Leadership	
Diversity	Love	
Education	Loyalty	
Empathy	Mastery	
Entrepreneurship	Merit	
Equality	Opportunity	
Excellence	Peace	
Expertise	Personal Growth	

Identifying shared values can make you more aware of what you have in common and what keeps your family close. Acknowledging them can give you an understanding of what you want to accomplish together and why.