WORKSHEET NAVIGATING FAMILY DYNAMICS

INSTRUCTIONS

Use reflection questions to work through family dynamics and set your family up for a successful philanthropic journey.

Differences in perspective and opinion occur in every family, especially across generations, and do not have to impede your philanthropy. The goal is to communicate differences and come to a shared understanding about your values and philanthropic goals.

- 1. Arrive at a process for handling differences through the following reflection questions:
 - a. How will funding decisions be made? Will a majority vote be needed to make a funding decision, or the approval of specific family members? Is your family open to a combined approach in which some portion of the total funding is allocated to each family member to give as they wish?
 - b. If there is an issue that certain members are passionate about and others oppose, will the family philanthropy fund it?
 - c. Is it important to keep the family philanthropy contained within one funding vehicle?

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Invite each family member to go through Activity A and Activity B in Section 1: Finding Your Focus Areas, or Activity I in this section.

After each family member has gone through the values and issues exercises individually:

- 1. Identify shared values or points of alignment across the family.
- Invite each family member to share why these values are meaningful to them. This process of personal sharing may help you find additional points of alignment and connection.
- 3. Similarly, identify points of alignment across issue areas. This may require you to think broadly. Examples: If several family members are interested in charter schools while others are interested in affirmative action advocacy, you might identify education as a shared interest. If entrepreneurship is a shared interest, some family members may want to start a national social entrepreneurship fellowship for college students while other family members may want to support a nonprofit helping women from an under-resourced local community to start their own businesses.

again have each family member chare why those issues are particularly

	meaningful to them and discuss what resonates across the family.
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