

Legacy Module 1.

Values and Legacy

Purpose:

To identify the core values that guide and underpin your family's philanthropy

Outcomes:

- Time for individual and group reflection, exploration and discussion on values
- Clarity around key values that are shared in your family group
- Ideas about how to utilize and activate these values in your family's giving

Process:

Mix of individual, paired, and full group work

Materials:

Recommended: [21/64 Motivational Values Cards](#)

Opening Reflection:

Begin with each member of the group going around and sharing their response to an opening reflection:

- Why are you glad we are talking about values, and what's one thing you hope we get out of this conversation, or one way it benefits our work together or giving moving forward?
- OR
- What's one value that's deeply important to you personally, and how has it helped you make an important decision in your life?

Why begin with such a question? Opening thoughtfully in this way invites each member of the group to personally identify the benefits of—and investing their time in—discussing values.

We recommend that each person set a timer for the same amount of time (1-2 minutes) so that you open with hearing each of your voices and that the group takes shared responsibility for—even in this small, initial way—welcoming one another's unique perspectives and equalizing voices and power dynamics around the (virtual or real) table.

Values Short-Listing Exercise

Framing: Today we will be working on our shared philanthropic values—which will likely have much overlap with our personal values! Together, we will look for commonality, and seek to identify meaningful and compelling values to guide and ground our shared philanthropy.

Activity:

Provide each participant with a deck of 21/64 Motivational Values Cards and point out how each has a word and definition. Take about 10 minutes to individually look through the cards. Select the top five that are important to you personally and that you believe could be meaningful for your family's giving. If there's an important value to you that is not on the cards, add it!

After each person has pulled their top five, work in pairs, sharing which five you've selected and why. Together, work to prioritize a total of three values to bring forward to the rest of the family for consideration and discussion. Then come back together as a family, sharing the three values each pair has selected.

Discussion:

Vote to prioritize if needed. Some giving families find a shorter list of 5 or fewer as being most helpful, while others have a longer list of 7-10 values or more that guide their work. Be sure to come up with a pithy definition of each (from the cards or beyond) to help ensure clarity and shared understanding.

Activation:

Finally, explore ***how you wish to utilize and activate these values in your giving***. How will these values guide your grantmaking and operations and how you work together as a family? What are the behaviors, attitudes, and actions that would correspond to each one? This important final step helps take values from nice words and bring them into vital, living practice. Values are a central part of legacy—start here.