I. Creating Your Family Foundation: Values, Mission, and Family Involvement

- **Draw on important family circumstances:** Look close to home for matters of overriding importance and concern to family members, and build on those concerns;

- **Think creatively and expansively:** Create safe conditions so that family members can open up and talk about dreams, vision, values, hopes, aspirations — the whole ball of wax; and

- **Research the family and the founder:** Particularly in posthumously established foundations, family members can learn about the founder’s life, values, and reasons for creating the foundation.

**Encouraging Family Talks Pays Off**

Family talks about major issues were not exactly an institution in the hustle and bustle of the busy family of Jerry Taylor and his wife Nancy Bryant. He ran MCI Corporation, and she had her hands full with family and community responsibilities. When he retired, they created their long-dreamed-of family foundation and finally found time to kick back and look at the big picture. “We talked informally at first,” Nancy Bryant says. “We are not a family given to meetings. When we first sat down, to discuss the focus of the foundation, it was the first time that we had all sat down together to discuss something like this. I took the lead and asked Jerry and our son to think about the kinds of things that they considered important and that the foundation might support. What subjects? Which organizations?” Family members found that their values rested on concern for the elderly, a belief in the importance of education, and a passionate vision that computers were essential for the growth and development of young people. These values would later morph into the direction the foundation would take.

**Making a Leadership Statement**

A founder may want to offer a leadership statement to family members. The statement might speak about the core of his or her vision, about the passion behind the idea of the foundation. In describing the origins of that core vision, that idea — be it a sense of caring, of giving back, of spiritually guided giving — the founder can share the deepest meaning of his or her philanthropy with the family. It’s risky for a family leader who has seldom brought up values, but it can be inspiring to other family members, particularly the younger generation.

“Dad had a dream that he wrote out during his last month with us,” Frank Gibney says. The “Dream” encourages us to meet periodically to share our lives, learn more about each other, and

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**Examples of Family Values**

- **Here are some examples of typical family values:**
  - “We believe strongly in family history and tradition. We have family reunions every few years. We all go to family moments — graduations, marriages, baptisms, and funerals. We all show up.”
  - “Our family keeps in touch. We’re on the phone and the Internet all the time with the grandparents, the parents. We help each other out with advice and support.”
  - “Our family takes our name very seriously. We have a lot of pride in our ancestors. We have a history, and we’re proud to be part of that history.”
  - “We care about our community and take part in community affairs.”
  - “We value diversity of opinion. Our family members represent a wide range of views.”
  - “Our family values education. Any time any family member graduates from anything, it’s a big deal.”