

Family Name: \_\_\_\_\_

Today's Date: \_\_\_\_\_

### Family Charter Worksheet

The dictionary definition of “charter” is “a written document that outlines or describes an organization’s functions.” The purpose of a charter is to **align the expectations of all contributors**. For a family charter, this means making sure the needs and expectations of every family member are in alignment with one another, and that these are spelled out clearly in writing.

#### VALUES:

Charters are based on the value of the organization(s) creating them. For a family charter, you must go back to your **values**. What are the expectations, hopes, and goals you have for the ways in which your family operates? How do you want your family’s attitudes and beliefs to present themselves in the way your children (and you) act towards one another and others? Start with **three** of your most important values and build from there. List them here:

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#### RATIONALE/”WHY”:

Every organization has a mission statement. For your family, this is the answer you give to the question: “**What is your WHY?**” In other words, why do you want or need to implement a charter? It might help to start with a prompt such as, “Our family is designing a charter because...” and completing the phrase.

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#### GOALS:

Goal-setting helps orient your family towards an outcome. It is okay if you don’t always meet your goal, because you can go back and assess what worked and what didn’t. With your family members, determine your **family goals** for creating a charter. What do you hope your family will achieve in creating a charter? Take note of what EACH individual family member states as his/her goals and record all of them. There are no “wrong” answers here; you are just listening to each other first. Encourage each person to contribute at least one idea. Stay positive!


Now, as a family, discuss the different goals. Which ones are similar? Which ones seem divergent? Are there ways to blend them into two or three simpler statements? This is not an easy task, especially if you have a child resistant to what they might perceive as a negative outcome. Stay with it: what CAN he/she articulate that could fit into this process? Where can you find common ground? Once you are able, narrow down your family goals to three or fewer and list them here:

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A FEW TIPS:

- Keep it simple. Broad is okay.
- Try and find some consensus.
- Be realistic about what is achievable.
- It's okay if these aren't perfect: making mistakes and going back and revising is part of this process. Model this for your children: it's an important life skill!

STEPS TO TAKE:

Once you have identified your family's goals, it's time to take each one and break it down into **manageable steps**. What is each person's role for each goal? What does it mean to be "successful"? How will you determine "success"? Is there a timeline for when steps need to be completed by? List each goal and the steps needed for each family member. How can you hold each other accountable? What do you need from one another in achieving these goals? You may need more paper than the space allotted here.

**Goal #1:**

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**Goal #2:**

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**Goal #3:**

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TIMELINE:

What is the **timeline** for meeting your goals? Pick something not too far away, but that gives you a few weeks to practice implementation. Print or write it out on a calendar and post it visibly so you can all notice progress over time. Extra bonus if you can include your steps on the calendar.

CELEBRATE EFFORTS:

It is important to celebrate efforts, even if things do not go as planned. Make a plan for what your family will do to celebrate and write it down here:

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NAMES:

In whatever form you end up creating your family charter, it is important to put each individual family member's name on it visibly. This is an agreement between all members of your family, and having everyone's name on it indicates agreement and commitment to trying it.

ASSESS AND EVALUATE:

After your celebrate efforts and successes, it's a good time to revisit what worked and what did not. What do you need to tweak or adjust? Did every family member feel the same about the outcome? What would you do differently the next time around?