Why am I completing the Family Relationships Assessment?

When financial capital or an enterprise is co-owned with the family, it is critical that this group knows how to collaborate while respecting the various roles they each may have in the enterprise. A foundation of effective governance at this stage is a family that has positive relationships and can collaborate at the ownership level. The results of this assessment will help you intentionally strengthen relationships and improve collaborative skills within your family.

What is the Family Relationships Assessment?

This assessment is a tool to identify specific steps that can be taken to enhance family relationships. The goal is to obtain a commitment of the areas that each family member agrees to work on to improve their relationships and to allow family feedback on these commitments.

An additional purpose is to encourage self-reflection on the role that you play in relation to your family, to get an idea of "what direction" you are going in, and to ask questions about what you can do to take one small step to invest in building a positive family culture. You could choose to leverage these results as a tool to help you set specific goals for your own personal development.

How is the Family Relationship Assessment completed?

Please describe how you feel about each of the following statements. When selecting your answers, think about your relationships with all your family.

Source: This worksheet was developed by Christian GC Stewart.
- Kenneth Kaye, The Dynamics of Family Business: Building Trust and Resolving Conflict, iUniverse, 2005.
- Fred Luskin, Forgive for Good: A Proven Prescription for Health and Happiness (New York: HarperOne, 2002).
- Douglas Stone, Bruce Patton, and Sheila Heen, Difficult Conversations: How to Discuss What Matters Most (New York: Penguin Books, 1999).
- Dr. Kerry Howells, Untangling You; How can I be Grateful when I feel so Resentful? Major Street Publishing, 2021.
- The version on the MTM360 dashboard was modified by Monroe Diefendorf and Shawn Barberis.