



Family Agreement Exercise Instructions

The process.

- 1. Set up a kid free coffee date for a minimum of 2 hours.** *If you can't find a babysitter, then set up time at home after the kids go to sleep. We like to do it in a public space because it forces you to be civil and mature and minimizes heated arguments.*
- 2. One week before the meeting, email the worksheet to all parties.** *This allows time for everybody to review the questions. Answering the questions are not necessary at this point.*
- 3. Coffee date day: Come open to hearing your partner but also making sure that your requests are heard as well.** *This exercise requires full transparency to work. Make sure to bring paper, a couple of notebooks, and pens. I also bring a laptop to record our agreed upon goals.*
- 4. First, write down the answers to the questions alone.** *Don't discuss anything with your partner. Right now is about what you want and not to be influenced by your partner.*
- 5. After you've each finished answering all the questions, go through each question and discuss both your answers.** *Take your time. Come to an agreement on each question.*
- 6. Review the agreed responses.** *This is what you will write down in your final agreement. It no longer matters what you came up with alone. What matters is what you agreed upon.*
- 7. Make any corrections and create a final agreement.** *Provide a copy to your partner, email it or have it in a place where you can both reference.*

How to get the most benefit from this exercise.

- 1. Come with an open mind.** *Most of us have heard throughout our lives the importance of good communication. But what does that mean? Good communication requires us to be brave and vulnerable. Humble yet assertive. Actively listen to what your partner is saying.*
- 2. Be honest with yourself.** *Write down what you truly want. Not what you think your partner wants. You'll adjust based on what works for your family but it's important to feel like you've been heard.*
- 3. Don't make it a blame game.** *It doesn't matter what has happened in the past. What do you want moving forward?*
- 4. Check in every 3-6 months.** *This allows you both to see if what you agreed upon is working. Sometimes things that sound great on paper end up being a terrible idea. The more you do this, the more you will learn about the rhythm of your own relationship, your personal rhythm, and your family rhythm.*



Family Goals

How do you define success?

The Oxford dictionary definition of success is the “accomplishment of an aim or purpose”. Collins states that it is “the achievement of something that you’ve been trying to do.”

There is a lot of western sentiment behind achieving wealth or material objects as a measure of success. I personally don’t believe success needs to be a measurable goal. It could simply be a feeling. Perhaps your goal is to feel happy or content in where you are in life.

Everybody’s idea of success is subjective so it’s important to think about how you and your partner view success. Write down your thoughts and ideas below and come up with your family’s definition of success.



Family Goals

What family goals would we like to accomplish this year? *This could be anything from traveling, to saving money, to creating a more calm environment within the family.*

What kind of life do we want to live? *This question is more focused on feelings and long term goals. Do you want to create a family life filled with sports activities, travel, art? One filled with less running around? Maybe a calmer, slower lifestyle? How do you want to feel as a family? Accomplished, calm, content? Things of this as the 5 year plan that you're working towards.*



Individual Partner Goals

Individual Partner Goals

For the following questions, sometimes the same answer may apply for both personal and professional. I like to separate them because I believe too often our professional goals overshadow our attention to our personal growth. Try to include at least 1 specific goal per question. The point of these questions is so that you can share your goals and have a good understanding of your partners goals. That way you can both support each other throughout the year.

From a personal perspective, what does a good year look like for me?

From a professional perspective, what does a good year look like for me?



Goals for Children

Goals for children. *Focus on each child individually.*

What are my aspirations for our children both personally and academically? *For example, last year ours were: improve swimming technique, go to bed by themselves, focus on creating self confidence, learn to read.*



Logistics and General Questions

What are ideal work hours/habits for me? *I've found it helpful to be as specific as possible. It's a lot more work but it forces you to think through what exactly you need to be successful at work and not just make up an arbitrary amount of time. Include departure time from home and the ideal time to leave work. Discuss work travel. Come to an agreed up number of days or rhythm. For example, if one partner travels, you can agree that they can travel X times per month for no more than X days. This gives everybody clear boundaries when needing to commit to work obligations. There are always exceptions but this provides a very helpful guideline.*

What do I need for self-care? *This can be weekly, monthly, annually. Don't be shy! Ask for what you need. It could be having the kids out of the house for the day, night out with friends, a trip somewhere alone, a class or workshop, etc. You'll have time to discuss later what is possible.*



Logistics and General Questions

Family Vacations/Holidays. *Who is in charge of planning them? How important are holidays to your family? Will you be taking a lot of shorter trips or one big one? Will they be road trips, domestic or international trips?*

Parent Date Days. *What would you like to do as a couple? What does an ideal date night or day look like? How many times a month/year would you like to have parent date days?*



Family Activities Wish List

Make a wish list of things you'd like to do as a family this year. *This can include visits to specific places or activities you'd like to do.*

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____
11. _____
12. _____
13. _____
14. _____
15. _____



Household Duties

Kids Homework. *List out all the homework/subjects you anticipate the kids needing help with. How will you approach it as parents? Which parent is working with whom on what subject?*

Meals. *Who will do the meal planning, grocery shopping, cooking, setting up the table, cleaning after dinner (loading the dishwasher and cleaning the table)?*



Household Duties

Chore schedule. *On the next page is a comprehensive list of chores that any household may encounter. Choose the ones that you feel tend to be a topic of disagreement. Discuss and assign an owner. An owner is the person that is responsible for the task and should be able to execute without any prompting from the other partner.*

If there are specific chores that are pain points, this is your time to discuss and work through what exactly is not working. Another way to think about it is to ask yourself this: If this chore were easy, what would it look like? Some answers could be that it gets eliminated because it's not that important, you outsource it, or you minimize the chore. If you need more pages, there is an additional page at the end.

Chore _____ Owner: _____

Specific notes/agreement for chore:

Chore _____ Owner: _____

Specific notes/agreement for chore:

Chore _____ Owner: _____

Specific notes/agreement for chore:



List of Household Duties

- Running errands to the cleaners
- Washing windows
- Cleaning the kitchen
- Cleaning the bathroom
- General tidying up
- Getting the car serviced
- Putting gas in the car
- Sorting incoming mail
- Paying the bills
- Balancing the check book
- Returning family phone calls or email
- Saving money
- Taking out the garbage and recycling
- Doing the laundry
- Folding the laundry
- Ironing
- Putting away the clean clothes
- Cleaning the floors
- Washing the floors
- Changing the light bulbs
- Repairing appliances
- Making the beds
- Defrosting and cleaning the refrigerators
- Shopping for kids clothes
- Home repairs and maintenance
- Buying toiletries for the home
- Sewing and mending
- Straightening the kitchen cabinets
- Yard and garden work
- General banking
- House plant care
- Straightening and rearranging closets
- Getting ready for house guests
- Party preparations
- Buying other children's birthday gifts
- Taking children to school
- Picking up children
- Child care after school
- Children's meals and lunches
- Spending time with kids
- Planning family outings
- Taking kids to the pediatrician or dentist
- Children's baths
- Child discipline
- Bedtime with kids
- Dealing with a sick child
- Dealing with a child's emotions
- Teacher conference
- Dealing with the school
- Special kid events
- Attending kids birthday/other parties
- Kids lessons
- Kids play dates
- Shopping for kids general stuff
- Getting people presents
- Keeping in touch with family
- Preparing for holidays
- Preparing for vacations and getaways
- Planning date nights
- Planning weekends
- Planning special meals
- Planning dinner out
- Family outings
- Financial planning
- Researching major purchases
- Managing investments
- Talking about the relationship
- Planning visits with friends
- Doing taxes
- Legal matters
- Family medicine and healthcare
- Attend parenting courses



Additional Chore Page

Chore _____ Owner: _____

Specific notes/agreement for chore:

Chore _____ Owner: _____

Specific notes/agreement for chore:

Chore _____ Owner: _____

Specific notes/agreement for chore:

Chore _____ Owner: _____

Specific notes/agreement for chore:



Final Family Agreement

Date: _____

1. *Family Definition of Success:*

2. *Our family goals for this year are:*

3. *We want to live a family life that is:*

4. *A good professional year for _____ will be:*

5. *A good personal year for _____ will include:*

6. *A good professional year for _____ will be:*

7. *A good personal year for _____ will include:*

8. *The goals for our children are:*

9. *The works hours and habits for our family will be:*



Final Family Agreement

10. *Self care for _____ includes:*

11. *Self care for _____ includes:*

12. *Our goals for family vacations/holidays will include:*

13. *We would like to have date days that are:*

14. *Our families activities wish list includes:*

15. *The kids homework will have the following focus and rhythm.*

16. *Family meal agreement:*

17. *Chore schedule: Use the chore page for this agreement.*