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THE HIDDEN TRUTH ABOUT VALUES

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Before you go any further, and without giving it a lot of thought, write down or at least identify in your mind your top five values. (Be honest – did you continue reading without doing the exercise? If so, do yourself a favor and take a brief moment to do it.) Now of those five, pick one. It doesn't have to be your "top" value, just one that is important to you. Now put it aside – we will come back to this.

VALUES IN FAMILIES

Values are critically important in families. They underlie almost all of the important decisions and actions of family members. Everything they think, say, and do is filtered through a matrix of values. Ironically, the reasons for this are not as most people suspect. Most believe that values lead to virtuous and principled action. This turns out to be superficially true – but it is a deceptive and potentially dangerous oversimplification. Without understanding how values function in human development, it is quite difficult to help families function more effectively using values.

There are multiple ways that family governance advisors help families identify values. One way – which I find to be of some significant benefit if used wisely – is through the use of values cards. In this exercise, families pick their values they believe describe them from a deck of cards that have printed on them a diverse array of inevitably noble values. The family then prioritizes those values through a process of elimination and rank ordering. The exercise is usually fun and people have a good time. A conversation ensues that will tend to reaffirm these values but not deeply test them to determine how authentic they are for the family as a whole or how deeply held they are by the individuals in the family. Typically, the exercise is then dropped without gaining truly meaningful or deeper insight. Sometimes the common values are crafted into values statements often produced by the consultant and provided to the family for feedback and modification. These statements are then supposed to guide family behavior – which they rarely do in practice. Consultants can get paid a great deal to go through this exercise.

Unfortunately, unless it is deftly used, this approach is fraught with problems. First of all, a great deal of what passes for a set of values choices can be, at one level, self-delusional and self-congratulatory.¹ As the wonderfully entertaining [Phil Cubeta](#) notes, this is the joker hidden in values decks. One of the problems Phil sardonically points out is that in our real lives, our vices are at least as important as our virtues and there are no decks that have vices neatly and boldly printed as possible choices to pick and prioritize. He has said in one of his posts: “Sometimes the parents who lament that they did not successfully pass on the family values might console themselves for having done so well in passing on the family vices.”

These card decks, if not used wisely, can lead clients to fool themselves and occasionally their naïve consultants (but rarely their families). This kind of values exercise can all too easily become an opportunity to whitewash reality in ways that rival a form of Kabuki Theater. The family pretends it acts out of a noble set of values when almost everyone in the family knows the truth of it. To make this kind of exercise useful, a skilled consultant must know a kind of values jujitsu (part of which is shared below) to make this exercise worthwhile or even fundamentally honest.

¹ It is worth noting the differences between values – which are mutable and change over time as a person grows and develops – and virtues – which, in classic moral philosophy, tend to remain constant over time and constitute an aspirational ideal for which to strive. These two concepts are often confused and conflated or used interchangeably. This creates no end of troubles in families where someone’s preferred values are confused with being virtues. Virtue seems an old-fashioned notion to many, but it seems well worth asking which “values” are largely instrumental (as discussed further in this piece) and which are deontological (that is, they are intrinsic to maintaining healthy social cohesion and essential to fostering individual well-being). See e.g., Alastair McIntyre, *After Virtue: A Study in Moral Theory* (2007), Kant, Immanuel, *Groundwork of the Metaphysics of Morals* (1785)

A BETTER WAY

A better approach is to use a recognized assessment to determine values. Our favorite is the AVI which is based on the work of Brian Hall and Benjamin Tonna. The [Hall-Tonna model](#) is cross-culturally developed and thoroughly validated and dovetails quite nicely with a great deal of cutting-edge research on adult development. It also has direct, explicit, and credible application to learning modalities, leadership styles, and communication preferences as well as to group culture. It offers a great deal of information for a basic assessment. I use it whenever a family allows it. I also use it in my coaching and consulting work with advisors.

The Hall-Tonna approach takes a developmental view of values. You might think of this as similar to Maslow's hierarchy of needs – the “lower” values support and drive behavior to meet more basic needs. As one moves up the hierarchy to have more complex and subtle needs – for example, self-actualization – one inevitably develops different values that reflect and support meeting those needs. The AVI provides a map of these individual values across a spectrum of values and puts them in clusters to make sense of them.

THE STRUCTURE OF VALUES

The instrument identifies foundational values, focus values, and vision values. Hall and Tonna generated a robust model for understanding how these values function in our personal development.

Foundational values are such things as security, health, and family. These are values we mostly learn and incorporate when we are young that serve us well later in life. When individuals take the assessment, some of these values show up as significant, but usually not. This is not because they are unimportant, but because they are basic and, for the most part, are superseded by more salient values chosen by the person taking the assessment. When lower values do show up as highly significant, it is usually because there are core areas that need attention. For example, someone who is quite developed but has a chronic illness might focus on health as being one of the values that demands a great deal of their attention.

Depending on where we are in the arc of our human journey, our focus values vary. We might value loyalty, empathy, meaning, or wholeness. Living our focus values typically gives us great satisfaction. If they are missing in our workplace or family, then we feel out of sorts and inauthentic. A lot of job dissatisfaction and even divorce can be traced to these values conflicts. Conversely, the more we can express our values in our lives, the more effective we become and the closer we are to a state of flow.

Finally, there are those values that are at the leading edge of our personal development – the ones that attract and challenge us to be our higher and better selves. These values might include wisdom, synergy, human rights, and transcendence. These we find challenging to enact and yet intrigue us and cause us to explore the frontiers of our own growth.

The interesting thing about this more empirical and nuanced approach is that, unlike the values cards, it is much harder to game the system and hide what is really going on for us.

THE PROMISED JUJITSU

But let's say you don't have access to these fancy tests (or your clients wouldn't take them even if you did). What meaningful work can be done with values? Here are two approaches that can be used with values cards that, in our experience, make them more honest.

It is time to pull out your chosen value from the opening exercise. If you didn't do it when you started the article, please go back and do the exercise now! What follows will make a lot more sense if you do.

Exercise 1: The Six Questions

Looking at values in a way that will provide a more nuanced view of how values truly function in individuals and families requires some deeper inquiry. We have at last come to the promised facilitative jujitsu. For the value you picked from the values you listed above (or that were drawn from a values card deck), here are six questions to apply to that value:

1. How does having this value serve me?
2. How does having this value impair me?
3. How do I react when this value is challenged or violated by others?
4. What is the blind spot I have because this value is important to me?
5. How does having this value cause me to suffer?
6. How does having this value give me peace?

This brief exercise serves to strip values of their varnished nobility and begins to ground them in reality in ways that allow a person to more deeply benefit from having been through the experience of identifying core values. Allow us to give you a personal example: one of my core vision values (one I aspire to) is equanimity. Here are my answers to the questions developed in real-time without a lot of editing (except for the parentheticals):

1. Equanimity gives me a sense of peace and calmness in the middle of difficult circumstances. It grounds me in the present moment. On my good days, it allows me to deeply connect with people without blame or judgment. (Sounds pretty good – even noble – right?).
2. It can at least appear to cut me off from my feelings and the feelings of others – it can make me seem uncaring. (Yikes! Not so good.)
3. This is tricky – when challenged I tend to get all the more equanimous – sometimes this looks like going blank or detachment. (Because this is a vision value it is not likely to trigger a reptilian response, but if it was a foundation value violation is likely to cause a very strong stress reaction which would typically look like fight, flight or freeze – the going blank or detachment described in my response could be seen as a milder form of internal flight or freezing.)
4. On my bad days, I can discount or condescend to other people's suffering which is not good for them or for my relationship with them.
5. Not much suffering here...which is, I guess, a good thing, but I suppose it can tend to make me a bit narcissistic or support a form of navel-gazing which is its own form of exquisite torture.

6. Well, there you go...that is kind of the whole point – a direct way into the peace thing. Pretty efficient.

As you can see, when you start looking closely, holding a particular value – even a value as seemingly noble and even as innocuous as “inner peace” – is almost always a mixed bag. The value does contain real strength and purpose, but it also has shadows and blind spots. It gratifies and pains either ourselves or others. It opens us up to life and simultaneously serves to shut parts of life down. In the process of examining these values, we hopefully gain a bit of humility and self-awareness. We also come to understand our operating system far better than we might otherwise. When done skillfully, it allows us to make choices that will diminish our suffering and the suffering of those around us.

Most importantly, when used this way in families, it opens an honest and forthright conversation among family members. Having candid conversations about not only the power of certain values but also the shadows and blind spots they create as well as the potential pain points they generate within individuals and in interpersonal relationships.

Exercise 2: The Ultimate Trick of Values

Now here is where the jujitsu gets really interesting. There have been a couple of hints dropped along the way. Did you spot them? “Values”, as it turns out, is code for “needs”. Let that sink in for a minute...this will rock your world if you let it.

This insight alone – when it is deeply grasped and understood – can change family relationships. Marriages can be saved, families can communicate more effectively, and expressions of compassion and understanding for oneself and others can multiply. All from this one tiny little insight.

Values = needs.

It is as simple as that.

Let's look at a couple of examples. If you value integrity it means you must have integrity yourself and you must be in relationships with people who have integrity for you to be fully at ease with a sense that your world is as it should be. If you value compassion, you will not be totally at ease around unkindness and you will not want to be in relationships with people who are callous to others. Values are code for needs.

This means that knowing a person's values is tantamount to knowing the matrix of needs that runs their thinking, their emotions, their motivations, and their actions. It also unlocks where and why they become stuck. To test this, look at your own top five values identified above and ask if they are not needs that must be met for you to be happy, successful, and fully engaged. Ask your spouse or partner or a dear friend what their core values are and see if those don't map directly to what they need from you and the rest of their lives. Simply seeing this in its full glory can be revolutionary.²

² One trope in family consulting is that a family can have common values. The Hall-Tonna work shows that groups do not have intrinsic common values that are important to all of the individuals in the group. All values that show up in group surveys are

For advisory relationships, this insight can be pivotal. Advisors are well-served if they know and understand their clients' core values (core needs). If you ask a client about their needs, you will likely either get a blank stare as though this is the first time they ever thought about the question in the context of your relationship, or you might get a kind of grocery list of expectations or desires. Either way, the information is not very helpful. Whatever the client shares will be "small picture" stuff in that it will tell you about some specific things you can do but give you no deep insight into the "whys" behind those requests. Serving these clients becomes more like painting by numbers rather than creating beautiful art.

However, if you ask them "What are your five bedrock values?" and listen to the answers with compassion – you will have uncovered some of their deepest needs. This is truly big-picture information, and you will find that if you absorb it and allow this information to shape your relationship with your clients, it will transform every interaction you have with them. In the hands of the truly skilled, this can turn the science of advising into an art form.

By knowing a client's core values, you will immediately know a great deal about how to best serve that client. Assuming they have been straight with you and have enough self-awareness to identify their values (which in some cases is a big assumption), you will have solid information by which to figure out the sources of their core competencies, what will likely trigger them, what their blind spots are likely to be, what will be hard for them to adjust to, what causes them to suffer and what gives them hope and peace. If you learn about the similarities and differences in values between partners and within families, you will know how to approach different people to meet their respective needs within the larger family system. You will also be able to help them become much more aware of the source of values conflicts, why those conflicts are emerging, and how best to resolve them. A good bit of this kind of conflict is arising because core needs (or values) are at odds or at least not clearly understood and being met.

You will also have a great opening for deeper conversations that will allow you, if you are truly worthy, to become trusted. Having been told a value, you have the perfect opening to inquire about how those values came to be important to them. If asked sincerely with a willingness to take the time to hear the answers with an open mind, an open heart, and an open will, you will find clients share the most amazing stories. Stan Slapp, a corporate consultant, asks people in his workshops to reveal "a moment of truth" in their character formation, which is just another way to talk about a core value. Here is [the story](#) he shares to spark those conversations in his workshops. If you choose to click the link, prepare to be inspired and moved. This stuff is intellectually and emotionally powerful.

"weak attractors" meaning they will not motivate group behavior in a meaningful way. This is one of the reasons why values statements rarely work as hoped – the family has diverse needs/values and therefore will not conform to a set of expectations that don't meet their fundamental needs. (Note that in corporations, values statements operate differently – they are fundamentally a legislative mandate, and following these mandates is a condition of employment. Few employees would say that their top personal values line up perfectly with the corporate values). What we have found to be far more powerful in families than identifying common values is identifying common interests – what is it that will serve the needs of family members given their diverse set of values, beliefs, and motivations? Once common interests are identified, principles can be created that will make achieving those common interests more likely. Even people who have done values work for years have discovered that one must get to principles and agreements for the values work to have any meaningful effect.

PASSING ON VALUES

What many families believe is that values are noble and that actions arising from values are principled and reasoned. In fact, “values” are often a seething cauldron of human need. Consider the old saw about “passing on one’s values”. When seen in this re-framing of values as needs, this expression quickly loses its moral veneer, and its darker side stands exposed. If one understands the relationship between values and needs, “passing on one’s values” can mean letting the family know what your needs are so that they can meet them and please you. It may be that meeting these needs has served you well in life and that you want the best for others based on your experience. But this exercise is also a way for parents to attempt to make the world a much more comfortable place for themselves. If their children live by the parents’ values, it directly meets the parent’s needs. Rather than being an altruistic move, this passing on of values can easily morph into a selfish power play designed to make the senior generation more comfortable.

How much suffering has come from parents valuing “hard work” while the children have developed a different set of values? This is not to say that working hard is not important, but rather it moves parental authority off the moral high ground and allows for a different kind of conversation than the values-based conversation. It allows the parent to own their shadow and the blind spots and it allows for an honest discussion about the role of contribution in creating a good and satisfying life.

What “passing on values” doesn’t necessarily promote is the actual (as opposed to imagined) human development of the children who may have separate and quite different needs (i.e. values) based on their developmental arc. The better question parents could ask is where their children are in the journey of their personal development around values. Asking the children what their values are (i.e. what their deepest needs are) and helping them figure out ways to meet those needs allows children to grow into more mature adults. Younger children will likely have slightly different values. Older children certainly do. It turns out that if the children learn to meet their current needs, they will, according to Maslow, develop higher-order needs (i.e. “better” or higher-order values). Some of the best work parents and grandparents can do to support their children is helping them to deeply fulfill foundational values, find ways to express their focus values, and encourage their aspiration to live more into their higher values – or, to shift this slightly, help them meet their foundational needs, focus on their current needs, and support their efforts to meet their higher order needs. This, it turns out, is the core engine for personal and collective development.



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