

# Removing Stumbling Blocks

By Adam Stone

Dialogue is key to family philanthropy.

When Debra "Debs" Weinberg sits down with multiple generations of her family members to talk about philanthropy, she knows from the start that they may not always agree. But when it comes time to making grants from the Lillian and Nathan Weinberg Family Foundation, she says, harmony gets star billing.

"We all recognize that a family foundation could be divisive, and we also know there is a greater impact if we are all working together," she says.

It's a common theme in the philanthropic world. Family members may share governance of a fund or foundation, but that doesn't mean they will agree on where the money goes.

"This is probably the biggest concern that families have," says Nancy R. Kutler, vice president of the Center for Funds & Foundations at the Associated: Jewish Community Federation of Baltimore.

Part of the problem is generational. Older family members may lean toward Holocaust education, for instance, while younger people may want to fund rescue efforts in Darfur. It's a challenge, but not insurmountable, says Lauren H. Klein, director of family philanthropy for the Center for Funds & Foundation at the Associated.

Sometimes it's just a matter of perspective, the ability to see Darfur and Dachau as two sides of the humanitarian coin.

"If you can unpack those issues, people will understand that these are all still Jewish values," she says.

The same may hold true when it comes to Israel-related causes. Some family members may have stronger or weaker Zionist leanings, yet many grant recipients in Israel may be seen under more general headings, such as social services, or care for at-risk populations. In finding this common ground, families may be able to sidestep surface differences.

## Neutral Arbiter

As one might expect, experts in philanthropy say communication is the single best tool for bridging gaps. Given the natures of families, though, it isn't always.

Klein says she will open discussions with a hypothetical question. If you had \$1 million, what would you do with it?

"It's important to try to understand each person's perspective and where they are each coming from," she says.

Deep questions help establish rapport so that when the family sits down, Klein can be a neutral arbiter.

The exercises can get abstract. A facilitator may show picture cards of a hot air balloon, three elderly women, kids around a fire truck or college students on a campus lawn.

"I worked with a family recently who wanted to do something in memory of a

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family member. So we looked at the cards and they picked things that were important to him," Klein says.

Still, with families potentially dispersed among many states or even nations, it can be difficult to forge consensus.

Weinberg, also chair of the Family Philanthropy Initiative at the Associated, relies on occasional personal encounters.

"For instance," she says, "we met over Thanksgiving to talk about grant-making and what to avoid. We do these things at times when everybody can come together because that is part of the message, that working together is better than working as individuals." J

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The Center for Funds & Foundations' Nancy R. Kutler (left), shown here with Lauren H. Klein, says harmony "is probably the biggest concern that families have."