

**Lippman Kanfer Family Foundation's Theme Fund:  
A Case Study in Developing a Philanthropic Vehicle  
That Balances Impact and Family Bonds**

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*How can a diverse, multi-generational family with a deep commitment to philanthropy create a structure that provides common ground to give together while improving their skills and knowledge as philanthropists?*

*When a family has diverse lives, interests, strengths, how do you take advantage of that potential to explore philanthropic questions and to provide an opportunity for family members to deepen their mutual understanding? The Kanfer family is by no means the only family facing these 21st century challenges, and their particular approach to addressing them we hope will provide a model, or elements of a model, that other families can utilize.*

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## Background

Lippman Kanfer Family Foundation was founded by Jerry and Goldie Lippman in 1966. Their nephew, Joe Kanfer, was also active in the early years of the foundation. Joe entered the business Jerry and Goldie founded and was like a son to them. Jerry and Goldie had no children of their own, and Joe was an only child so the immediate family was small in the first two generations. However, in the third generation (G3) there are 4 children (ranging in age from their early 40s to late 20s), 3 of whom were married when we started this process, and those children had children of their own (G4), numbering 10 at the start of this process (ranging from elementary age to babies), 12 at the time of the end of the pilot.

By the early 2000s, the foundation had become increasingly focused and its giving included both regional funding within the Kanfers' hometown of Akron, Ohio and national strategic philanthropy in the Jewish community. By 2011, G3 had a strong commitment to their hometown, but most members of that third generation were no longer living there. And while all were passionate about Judaism, they engaged with it differently, and in some cases had less time or interest in engaging in the intensive process of strategic Jewish philanthropy that was increasingly becoming the foundation's focus.

Leadership decided to create a separate foundation to house the strategic, national philanthropy and devote the family foundation to creating a culture of family philanthropy and Akron giving. This separation, with accompanying delineation of purpose, helped clarify each foundation's mission. Furthermore, the move allowed each foundation to focus, without maintaining multiple sets of criteria for making decisions, and made it easier for family members to opt-in according to their interests. It was hoped that the new structure would increase everyone's satisfaction in the outcomes and process of philanthropy. Establishing a second foundation made it clear that family members had a choice and didn't set up a dichotomy of 'participate in the strategic foundation or don't engage in familial giving.' Funds were also set aside in the family foundation for the emerging priorities in the geographies where members of G3 were living, and family members were excited by this opportunity to engage in their local communities through the foundation.

However, the family didn't want stop giving collectively to a common cause where they'd be engaged in mutual decision making. They articulated a strong desire to do philanthropy *together*. But how? And around what?

## **An Answer: The Theme Fund**

In conjunction with the foundation’s Executive Director, family leadership (Joe Kanfer and his eldest daughter) articulated the challenge: an expanding family that was going to grow even more in the coming years, with diverse interests, and different levels of “expertise” – both in doing philanthropy and with issue areas. Family leadership felt strongly that they wanted to instill and cultivate a family culture of philanthropy - and a chief parameter for any solution would be the ability to nurture the family’s desire to engage in collective learning and granting.

Leadership shared this challenge with the rest of the family, and one of the other members of G3 came up with a creative idea – what if they chose a topic, learned about it and organizations working in that space, and then made a few meaningful grants. After a set period of time, the topic would change. Learning about how to do good grantmaking would continue throughout the process, but by rotating the topics it would expose family members to a variety of causes, and while the topics would be chosen by consensus, the planned rotation would insure that if someone wasn’t passionate about the current topic they would only be engaged with it for a limited time. Different family members would likely have the opportunity to be “expert” (or at least more familiar) with a topic, and ideally, passion for areas selected would not sit permanently with any subset of the group.

Note: while this case study refers to participants as “family members” or the “family,” they are also all members of the foundation’s board.

## Putting ideas into practice

### Identifying Leadership

Working with the foundation professional as a facilitator, a team of 3 family members formed a leadership group to create a structure that would support this idea, and led a meeting with the entire family to establish the fund's objectives. The leadership group was comprised of: a member of G2, a member of G3 (the youngest daughter, and mom to several members of G4), and the husband of the second oldest daughter in G3 (and father to 2 members of G4.) These three Theme Fund leaders volunteered for the role, and the family purposefully encouraged members who were positioned to bring cohesion and fresh thinking to the family dimension of philanthropy, and who were less steeped in the more formal strategic philanthropy process. Reflecting back – the not-completely-intentional configuration of G2, G3, G3 spouse was a very productive cross-section of the family.

### Setting Boundaries

The family decided the fund would focus on topics that transcend religious perspective, and in general, focus their philanthropy on secular organizations. The decision to minimize giving to Jewish organizations in any issue area was twofold – first, it reaffirmed respect for the diverse approaches to Judaism within the family, and secondly recognized the fact that family members were all engaged in personal giving in the Jewish community and this effort's goal was to expand horizons around other philanthropic causes. This boundary also reduced friction from divergent personal views and the pressure to champion projects with which family members were already engaged.

While the themes would not be Jewish, there was no desire to minimize the family's Jewish values, and most notably the concepts of *Tikkun Olam* – the responsibility to contribute to the repair of the world and *Naaseh V'nishma* – that people learn by doing, were explicitly incorporated into the Objectives of the Theme Fund.

### A Starting Point

For the pilot, the following objectives were adopted:

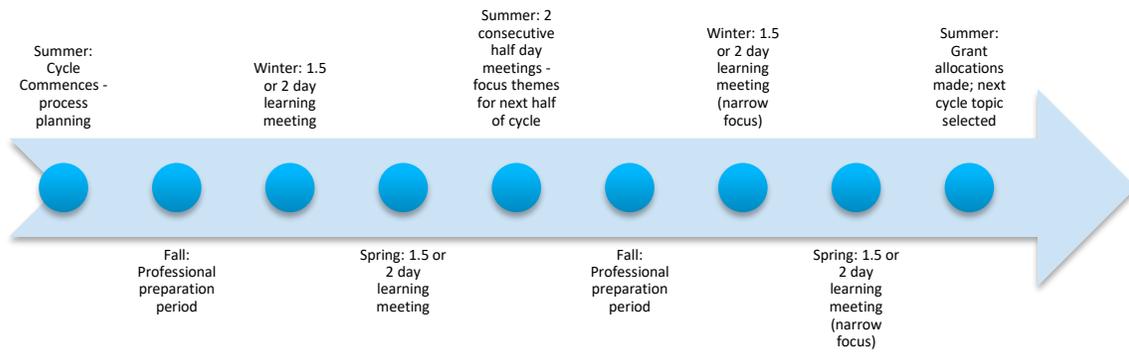
- Learn about the world
- Learn how to do good philanthropy
- Help the family learn about each other
- *Naaseh V'nishma*—We will do and we will understand
- *Tikkun Olam*—Repair the world

Cycles would be approximately 2 years long and the foundation's leadership set aside \$100,000 for grantmaking (it was later clarified that that amount was per year and not inclusive of fund

expenses). In a facilitated session with the Executive Director, the family chose Domestic Poverty as their first theme from a list of more than forty different potential giving areas.

### Early Learnings

During the first year, the meeting structure went through modifications to meet the specific needs of the family, and settled into a sustainable routine. Ultimately the Theme Fund arrived at a schedule of two 1.5 to 2-day learning meetings a year (winter and spring) followed by a session of 2 consecutive half-days in the summer. With respect to the full theme cycle, after the first year, the summer meeting is intended to include discussion on any desired adjustments to the process, and the opportunity to collectively weigh in and focus the learning for the second year since the theme was broad. In the second year, the summer session is used to make grant allocations and choose the next cycle topic.



During the pilot, the 2-day learning meetings featured a variety of activities, including speakers from organizations, attendance at a conference on homelessness, discussion of a documentary that had been viewed in advance, site visits to organizations. It also included learning sessions on Jewish sources dealing with poverty, in keeping with a desire for Jewish values to impact the collective approach, despite maintaining focus on (with one small exception) secular organizations. Also, since family members wanted to share stories from their personal giving, one working lunch used to discuss personal giving priorities and share stories of recent gifts that they were particularly excited about or that they found challenging and wanted the group's input on strengthening

Finding the right way to share articles and information between learning sessions was a little challenging. In Cycle 1, there was experimentation with a blog that wound up being only used by foundation staff – no one else posted resources or commented on materials. Email threads

that pushed out materials and discussion prompts proved more useful and effective for generating conversation.

A few supplemental activities were done in the evening by conference call (for example, we held an extra session outside the 2-day learning sessions to discuss a documentary). While the evening conference call did enable an interesting discussion, the late hour (after children's bedtimes) and the lack of ability to speak face to face ultimately limited any desire to use the mode more frequently.

Experiments with an online messaging system (Slack), got slightly more traction, particularly with G3, probably thanks to their professional usage of the tool.

After each 2-day learning session, the family debriefed the experience. Afterwards, the Executive Director met with Theme Fund leadership to determine any necessary adjustments to the process and design ways to target the content of the next learning session based on the debrief. Often, based on these conversations, the staff conducted research and then circulated additional information on potential subtopics and organizations to the family. Brief surveys enabled family members to rank preferences with ease, and ensured highly responsive curriculum development for each meeting.

Due to the short-term nature of the fund, the Executive Director, who designed each learning session and invited the speakers, was very clear with all organizations that the foundation and family members were learning and might not ultimately consider them for a grant. It was also made transparent that each topic was selected for short term engagement and thus the foundation should not be considered a prospect for long term support. Since the grant making would happen at the end of a two-year cycle and was unlikely to provide every organization with a grant, at the first learning session the family decided to provide an honorarium to each of the presenting organizations as a thank you for their time and expertise.

At the last of the four learning sessions of the pilot cycle, clarifications were made. There was significant discussion about whether grantee organizations had to be a part of the groups that had already been met with during the learning phases, or whether, based on what was learned about poverty, there might be a desire to investigate other organizations. After productive debate, it was decided that, as an important part of the shared experience, it was best to choose amongst the organizations that had met with the family, instead of asking sub-sets of the family to do site visits and report back on new organizations. In reviewing this decision, the time the family members had available was a significant factor and there was universal agreement that the caliber of the organizations already met with was very high since the Executive Director conducted due diligence before inviting them to present, creating consensus on the feeling that choosing amongst them would not sacrifice impact. Also, since family members suggested groups throughout the process, the body of organizations was inherently reflective of their interests and our learning about poverty.

For grantmaking, at the outset it was determined we would aim for consensus and fall back to voting only if consensus could not be reached. A clause was established so that if someone posed an organization and felt passionate about it, it could not be excluded from consideration. For the pilot cycle, grantmaking wound up happening very organically. At the end of the fourth session, the full membership of the Theme Fund reviewed the organizations that had met with and identified those who would be invited to submit a more detailed proposal. The Executive Director worked with those organizations to craft the proposal, and that summer the grantmaking task was basically confirming the four organizations we had invited to submit proposals and deciding how to allocate the funds.

## Challenges

For the foundation professional (or anyone else managing the cycle of learning and outreach), the rotating topic requires becoming a program officer for a new topic every time a cycle starts – acquiring expert knowledge, contextualizing the topic within the foundation’s mission and for its leaders, and developing a rolodex of relevant contacts in short order. It’s scary, it’s exhilarating. The Executive Director for the Lippman Kanfer Family Foundation reported that being able to call on colleagues whose foundations do work in varied areas was an asset, as being able to build off others’ work and knowledge was essential to managing nuanced issues in a tight timeframe. The professional must understand the topic well enough to surface the major questions and identify speakers and organizations who can ground the learners quickly in the topic and with enough sophistication that they can go deeper.

The rotating fund does not align with philanthropy best practices, something recognized at the outset – but the choice was very consciously made to prioritize learning over best practices. By deliberately limiting the amount of money in the fund and being conscious of each departure from best practices, risk was mitigated. The Executive Director took on responsibility for reminding all participants that the primary objective was *not* to make perfect grants (some family members who had more strategic grantmaking experience were inclined to seek optimal impact; the fund mission included expectation of deep impact, but without the level of sophistication that someone working extensively in this area might achieve). Grants were two-year grants, with the amounts scaled to be helpful to an organization or a project, but without creating dependency. As stated, the Executive Director also strove to communicate clearly with all organizations (both during the process and after a grant was made) to set appropriate expectations about the limited nature of prospective support.

A particular ongoing challenge was scheduling. A high degree of geographical disbursement and equally high levels of individual commitments, prevented the time line from being executed as planned, and it expanded somewhat beyond two years. The touchstone of having a summer session became essential, taking advantage of the family’s tradition of congregating at a shared vacation home for a few weeks, not only providing a practical opportunity to conduct business, but reinforcing the emotional benefits of the shared endeavor.

## Reflections for Others Who Might Want to Use Elements of this Process

Knowing your stakeholders is so important. The Kanfer family is used to working by consensus and has family members who love process as well as others who wanted more flexibility. This theme fund was designed to give a known collection of adults enough structure to feel grounded in expertise and impact without being slaves to the process. Other families or philanthropic collaborations might need or desire more rules for operating.

In July 2014 the first cycle was completed and the second commenced. Interestingly, based on how broad domestic poverty was, the Executive Director thought that the family would want to narrow the second topic before beginning the learning – however, the feedback from the family was to keep the topic broad initially and to narrow as they learned.

As with any family, a few years makes a difference – the youngest member of G3 got married and decided to join the board and Theme Fund with his spouse (he was welcome before this, but other commitments kept him from participating). At the start of the process the oldest grandchild was approximately 7; he’s now a young teen. A separate small project was created to engage “the kids” (G4) in service projects, with the extended family participating, and the team also sought small opportunities to include them in Theme Fund learning – especially since the next topic, Climate Change, was also accessible to kids.

By the end of the second cycle, the fund felt different than the family’s ongoing strategic philanthropy; the family reported that the final meetings of the cycle felt relaxed and were imbued with a sense of fun. This isn’t to say that the strategic philanthropy done by the foundation is not enjoyable, but the Theme Fund tone shifted to have a “family feel.” Learning sessions were productive and the conversation stayed focused on the topic at hand, but the fund’s culture allowed for deliberate attention to the feelings and internal cohesion of the family during the grantmaking cycle, as a legitimized priority rather than byproduct of collaborative giving. As a result, the process and grants themselves felt reflective of the group as a whole, and satisfying as a fulfillment of the foundation’s mission.

## Conclusion

In the Talmud, Rabbi Tarfon tells us that “It is not your responsibility to finish the work, but you are not free to desist from it either.” Similarly, this fund, while having an established structure, will likely change as the family’s circumstances do. However, there is reasonable optimism that the basic structure will provide a container for working together in the coming years.

The cycle on domestic poverty ended with a productive discomfort. The family continued to appreciate the value in commitment to a rotating theme and decided to stay the course, but as anticipated, there were complicated feelings after a cycle of collective learning on poverty, with the knowledge that a few grants had a limited impact on this important, complex, and wide-ranging topic. The family determined that it would be advisable to consider returning to themes in the future, and that poverty should continue in family work via hands-on service. Furthermore, several family members utilized what they had learned – both content and means of investigating an organization/topic – in their personal philanthropy.

The Theme Fund has room to grow, and will continue to do so – deliberately and, most importantly, together.

## Post-script

Some of the poverty grants moved the needle in exciting ways. A grant to Hunger Free America was the first grant made in support of their national strategy and gave the organization confidence they were moving in an important direction. A grant to Sargent Shriver Center on Poverty Law partially funded a full-time Communications Director which significantly increased their capacity to amplify their message and provide communications advice to partners.

*For more information or consultation in adapting some of the concepts described in this case study, please contact Executive Director, Dara Weierman Steinberg  
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