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Cataloging Information

ZELLERBACH FAMILY FUND INNOVATIONS IN SUPPORT FOR HUMAN SERVICES AND THE ARTS, 1992, xi, 267 pp.

Zellerbach Family Fund president William Joseph Zellerbach (b. 1920), and executive director Edward Nathan (b. 1919) discuss the fund from 1970-1990, involvement of recipients, community and minority representatives in grantmaking for the arts, family and child welfare services; observations on Northern California Grantmakers, San Francisco Hotel Tax Fund, various cultural and social service organizations, cooperation between foundations, related government programs and funding, other philanthropic issues. Includes brief interviews with Beverly Abbott on mental health issues, and Janice Mirikitani on minority cultural and social concerns.

Introduction by Robert Sinton, trustee, Zellerbach Family Fund.

Interviewed in 1990 by Gabrielle Morris for History of Bay Area Philanthropy Project. Regional Oral History Office, The Bancroft Library, University of California, Berkeley.

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PREFACE

Northern California Grantmakers and the Regional Oral History Office of The Bancroft Library at the University of California at Berkeley are pleased to present this series of oral histories documenting the growth and development of Bay Area philanthropy during the last twenty-five years. It is our hope that these memoirs will both preserve a record of the experiences and philosophies of selected senior members of the philanthropic community, and encourage greater understanding and discussion of the traditions of charitable giving.

The starting point for this series was an earlier project of the Regional Oral History Office, completed in 1976, which documented Bay Area foundation history in the 1930s and 1940s, and the evolution of issues and leadership in the 1950s and 1960s. The current series focusses on the significant changes which have occurred since that time, including the tremendous growth in corporate giving, changes in the role of the government in supporting the arts and human services, and increased collaboration among grantmakers.

Selection of prospective interviewees for the project involved many hard choices among outstanding persons in Bay Area philanthropy. The final selection was made by The Bancroft Library and reflects the broad spectrum of grantmaking organizations and styles in the Bay Area. The guiding principal has been to preserve a record of the thinking and experience of men and women who have made significant contributions in shaping the philanthropic response to the many changes which have occurred over the last twenty-five years.

Overall guidance for the project has been provided by an advisory committee composed of representatives from the philanthropic community and the U.C. Berkeley faculty. The advisory committee is particularly indebted to Florette White Pomeroy and John R. May, whose enthusiasm, leadership and wise counsel made the project possible. The committee is also grateful to the twelve foundations and corporations which generously contributed the necessary financial support to conduct the project. Members of the advisory committee and the contributors are listed on the following pages.

The director for the project is Gabrielle Morris, who conducted the previous project on the history of Bay Area foundations. The Regional Oral History Office was established in 1954 to tape record autobiographical interviews with persons significant in the history of California and the West. The Office is under the administrative direction of Peter Hanff, Interim Director of The Bancroft Library, and Willa K. Baum, Division Head of the Office. Copies of all interviews in this series are available for research use in Foundation Center libraries in San Francisco and New York, at the Peninsula Community Foundation in San Mateo, The Bancroft Library, and UCLA Department of Special Collections. Selected interviews are also available at other manuscript depositories.

For the advisory committee,

Ruth Chance
Thomas Layton

October 1991
San Francisco, California

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For additional oral histories on philanthropy and nonprofit organizations, consult the Regional Oral History Office.

The Regional Oral History Office would like to express its thanks to the following organizations whose encouragement and support have made possible the History of Bay Area Philanthropy Series.

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INTRODUCTION--by Robert E. Sinton

The Zellerbach Family Fund has been a boon to our community in a multiplicity of ways as described in detail in this volume. In my capacity as a member of its board of directors for the past fifteen years, it has afforded me and my colleagues not only the opportunity to do "good," but also the chance to know and work with two superb human beings--Ed Nathan and Bill Zellerbach.

I had known Ed Nathan as assistant director of the Jewish Welfare Fund of San Francisco during the late forties when I was a young layman doing fundraising for the local community and for Israel in the early days of its nationhood. Thirty years intervened until I picked up with him again when I became a board member of Zellerbach Family Fund. His knowledge of social work and his ability to project and plan substantive programs is prodigious. His sensitivity and conscientiousness have always made it easy for those associated with him--board, staff, and the many client beneficiaries. He is a friend to whom one can turn for advice in many areas both philanthropic and psychological. If I have to sum it up in one word: Ed is "inspirational."

Bill Zellerbach has become my friend over the last fifteen years on the board of Zellerbach Family Fund. He has been our leader--an understanding and considerate one, and a very good listener--there are so very few in this world! I think all of us agree that Bill in his quiet way has helped us to participate to the fullest extent of our abilities in our deliberations at board level. He is the thoughtful shepherd who gets us to achieve our goals of better programs with appropriate financial support. I've seen him working with two of his four children--they're good, too, and have great respect for him, but at the same time there is no timidity on their part to express themselves in helpful ways.

Working with Bill has enriched my life, and I am grateful for his friendship.

Robert E. Sinton
Trustee, Zellerbach Family Fund

October 1, 1991
San Francisco, California

INTERVIEW HISTORY

The team of William Zellerbach and Edward Nathan, as president and executive respectively of the Zellerbach Family Fund, has introduced such significant innovations in foundation philosophy and management that Northern California Grantmakers was eager to document their thinking and accomplishments over the past twenty years. Although technically a family foundation, the Zellerbach Fund has become noted for developing public-private partnerships to test more effective services for families and children, and for creating a mechanism to increase support to smaller arts organizations that involves a rich variety of cultural diversity and creative talent in making funding decisions.

For four generations, the Zellerbach family and the family business have been significant players in San Francisco's civic and economic life. Bill Zellerbach's grandfather, Isadore, built a major corporation for the manufacture and distribution of paper products and his grandmother, Jennie, was a significant benefactress of the city's cultural organizations.

Under the direction of their sons, Harold and James, the Crown Zellerbach Corporation became a national leader in its field. James's interest and talents in public affairs led to his being appointed ambassador to Italy; Harold devoted much of his considerable energy to the intricacies of the city's arts organizations, serving as president of the San Francisco Arts Commission under several mayors.¹

Jennie Zellerbach's estate became the nucleus for the Zellerbach Family Fund, established in 1956, and a separate company foundation was also established, now known as the Montgomery Street Foundation. Following in his father Harold's footsteps, young Bill Zellerbach graduated from the Wharton School of Business, University of Pennsylvania; made a name for himself as head of the Zellerbach Paper Company, co-founder of the Hunters Point Boys Club, fundraiser for the United Bay Area Crusade, United Negro College Fund, and other civic activities; and in due time became a trustee of the Family Fund.

One of his early undertakings was to bring in a New York consultant, who suggested that a relatively small foundation could increase its impact by deciding on a clearly defined area in which it would make

¹See Harold L. Zellerbach, Art, Business, and Public Life in San Francisco, Regional Oral History Office, University of California, Berkeley, 1978.

grants. Bill convinced his father that this idea was worth trying and that Edward Nathan, with whom Bill had played ball at the Concordia Club as a boy, should join the Family Fund to work out the plan. Nathan was then teaching at the University of California at Berkeley Graduate School of Social Welfare and knew Bay Area philanthropic leaders and nonprofit organizations well from previous experience at the Jewish Welfare Federation. Their partnership began in 1972 and continues to flourish in the 1990s.

The present volume recounts the accomplishments of Bill Zellerbach and Ed Nathan in, first, defining a manageable scope for the Fund's grantmaking and, second, expanding the range of its program as their experience grew and opportunity developed. As defined in its literature, the Fund seeks to support programs which, "through a modest investment, can bring significant service to many persons." While continuing and enlarging the family tradition of support for San Francisco cultural organizations, the Fund has perhaps had its most far-reaching impact on fostering innovations in family and children's services that have been enacted into state legislation.

Zellerbach is a man of strong convictions, though few words. His narrative reflects his devotion to family, loyalty to the community, and firm ethical standards. He believes in separation of the roles of trustee and staff in the foundation setting and obviously enjoys being cheerleader for the new program ideas that develop from the interaction of talented professionals Ed Nathan continues to bring together. Zellerbach also is clearly proud of his children's civic interests and their interest in joining him as trustees of the Family Fund, a fifth generation of the family's leadership in the city.

Nathan combines compassion for human needs and optimism for the improbability of social systems with a professional social worker's persistence in helping people help themselves. Reading his accounts of creating the Community Arts Distribution Committee, the family and children's services committees that have come to impact on state policy decisions, and urging cooperation between his professional colleagues in responding to emerging needs, it is clear that his energy and enthusiasm have encouraged many to follow his example. His narrative also provides a valuable look at the early days of Northern California Grantmakers in the mid-1970s.

Vivid counterpoint to these narratives is provided in digests of recorded interviews with Beverly Abbott and Janice Mirikitani that illustrate the Zellerbach Family Fund principle of involving in the grantmaking process significant practitioners in the foundation's fields of interest. Ms. Mirikitani, designer and director of numerous community programs sponsored by Glide Memorial Church, recreates the political and artistic spark that enlivens the Community Arts Distribution Committee,

which funds and encourages young, small groups from many ethnic and cultural backgrounds. A career public administrator, Ms. Abbott tells of the ways in which the Mental Health Advisory Committee has drawn together government agency people strapped for time and budget and has inspired them to consider new ways to deliver urgently needed human services.

Three interview sessions were recorded with Bill Zellerbach in April and June 1990, and five sessions with Ed Nathan, in April, June, and July 1990, in their respective offices on Montgomery Street in San Francisco. Zellerbach is modest in size and manner, and spoke with interest of his experiences. Nathan is short and stocky, with twinkling brown eyes, and addressed questions about his work intently. In May 1990, one session each was recorded with Beverly Abbott and Jan Mirikitani, Abbott at the San Mateo County Mental Health Department and Mirikitani at Glide Church in the San Francisco Tenderloin.

Nathan had gathered together for the interviewer a pile of draft reports and talks presented during his twenty years with the Zellerbach Family Fund, which were most helpful in preparing for the interviews. Equally important were copies of the numerous pamphlets issued by the Fund to disseminate information about selected projects and programs they have funded. The appendix contains a listing of these materials, copies of which are deposited in The Bancroft Library.

The interviews were transcribed and edited lightly in the Regional Oral History Office. A few repetitive passages were deleted or combined. All four narrators reviewed the transcripts of their interviews promptly. Mr. Zellerbach made a few minor corrections and additions. Mr. Nathan revised several passages for greater clarity, and wrote a post scriptum in appreciation of the oral history process. Ms. Abbott tidied up a few comments, and Ms. Mirikitani reworked a number of sections with a poet's deft touch that sharpened but did not alter her original intent.

The brief introduction to the volume provides further evidence of the close personal relations and sense of continuity that characterize the Fund. In writing it, Robert Sinton, a trustee of the Fund and himself a philanthropist of note, reflects not only on his acquaintance with Nathan and Bill Zellerbach, but also with Harold Zellerbach and with Bill's children, who are now taking their places on the board of the Fund.

Gabrielle Morris
Interviewer-Editor

October 1991
Regional Oral History Office
University of California, Berkeley

Regional Oral History Office
The Bancroft Library

University of California
Berkeley, California

History of Bay Area Philanthropy Series

William Joseph Zellerbach

REDIRECTING FAMILY PHILANTHROPIC PHILOSOPHY

Interviews Conducted by
Gabrielle Morris
in 1990

BIOGRAPHICAL INFORMATION

(Please write clearly. Use black ink.)

Your full name William Joseph Zellerbach
Date of birth 9/15/20 Birthplace San Francisco, California
Father's full name Harold Lionel Zellerbach
Occupation Executive (Deceased) Birthplace San Francisco, California
Mother's full name Doris Joseph Zellerbach
Occupation Homemaker (Deceased) Birthplace Cleveland, Ohio
Your spouse Margery Haber Zellerbach
Your children John William, Thomas Harold, Charles Ralph, Nancy Zellerbach Boschwitz

Where did you grow up? San Francisco, California
Present community San Francisco
Education B.S. in Economics 1942 Wharton School, University of Pennsylvania
Advanced Management Program 1958, Harvard University
Occupation(s) President of The Zellerbach Family Fund - Investor

Areas of expertise Executive Management, Marketing and Financial

Other interests or activities Philanthropic Activities, Horse Racing
and Golf

Organizations in which you are active President of The Zellerbach Family Fund,
Board of Directors San Francisco Symphony and San Francisco Art Institute

I PERSONAL BACKGROUND: BUSINESS AND COMMUNITY CONCERNS

[Interview Date: April 20, 1990]##¹

A Century of the Family Paper Business

Morris: Let's start with some of your family's history in San Francisco.

Zellerbach: Well, I was the fourth generation of Zellerbachs in the family business. My grandfather, Isadore Zellerbach, was one of six brothers and sisters. His father [Anthony Zellerbach] started the paper company.

What happened is that my great-grandfather's children--there were six or seven of them--all had equal shares of the Zellerbach Corporation. So when they passed away, the first thing that their families did to protect the heirs was to diversify and sell the stock. The inheritance taxes at that time were up around 90 percent.

So that diluted the family's interest in the Crown Zellerbach Corporation. When you take that through my father's [Harold Zellerbach] demise, and my uncles', and my aunts', and all the other children and heirs--by the time that I reached the age of fifty, maybe the family had half a percent interest, if you added up everyone. So it was a public corporation.

My uncle [James David Zellerbach], who was ambassador to Italy and also head of the Marshall Plan--I can still remember him saying that we weren't really a family business any more. This was also the time of the new trend toward professional management. The professional management, from the time they

¹This symbol indicates the start of a new tape or tape segment. For guide to tapes, see p. 241.

put it in, the corporation was never run--if you just look at the history of it, it just was downhill.

Morris: Even though members of the Zellerbach family continued to be officers of the corporation?

Zellerbach: Officers, but no longer were the chief executive officer. In my own career, I ran the distribution business, which was the original business that the whole corporation started with. I loved running the Zellerbach Paper Company. I just loved it.

Morris: I see. So, back in your great-grandfather's time, it wasn't the making of paper. It was--

Zellerbach: The selling, buying and selling of paper.

Morris: And then your grandfather added to it and--

Zellerbach: He added newsprint, kraft paper, paper towels, that sort of thing.

Morris: And bought out Crown Willamette?

Zellerbach: No, that was eventually a merger. All that is well documented, and you can get accurate facts and figures from thousands of books.

Morris: [chuckles] But you enjoyed the distribution end of the business.

Zellerbach: Oh, I loved it, and I was on the--[picks up book and hands it to Morris]. This is an extra copy.¹ It's yours.

Morris: Oh, thank you. That's beautiful. That's handsome paper, too.

Zellerbach: Oh, yes. It was all hand-blocked paper and hand-printed.

That book will tell you about my grandfather. He was the son of the founder, but he was really the stemwinder. The others amounted to nothing.

¹Memorial book for Isadore Zellerbach. See Appendix.

Growing up in San Francisco

Morris: Did you know your grandfather?

Zellerbach: Oh, very well. I was twenty-one when he passed away.

Morris: He also lived in San Francisco, and you grew up in San Francisco?

Zellerbach: My house where I live today is two houses from where he lived.

Morris: Oh, that's wonderful. You don't have that kind of family closeness very much any more, do you?

Zellerbach: No, you don't. I can't imagine a better place.

His house was 3524 Jackson [Street]. I grew up in the house at 3410 Jackson, the one Jim Hart now lives in. Okay?

Morris: All right.

Zellerbach: Small world?

Morris: Absolutely, absolutely, yes. Pacific Heights seems to have a lot of people in it who grew up in the neighborhood and whose parents and grandparents lived there. That's really nice.

Zellerbach: Oh, it's practical. It was absolutely the super way to live. My grandfather and grandmother [Jennie Zellerbach] had a home in San Mateo too. I can remember--well, come June first, or whatever the magic date was, they would move down to San Mateo to get out of the fog. My grandfather would take the train up to Third and Townsend [Streets]. My father and mother would drive down on Sundays. It would take us about an hour.

Morris: Drive down El Camino?

Zellerbach: Yes, El Camino.

There wasn't any Bayshore [Freeway]. I remember that well. So they had a super life.

Morris: And you could take the cable car from Pacific Heights down to the business district of town. Did they take the cable car?

Zellerbach: Oh, no. He had a car. But I took the cable car when I went to high school.

Morris: Did your grandfather introduce you to the business?

Zellerbach: In a way, he did, because I can remember being hustled out of bed because there was a big fire at the warehouse in Sacramento. We drove up to Sacramento to see the fire. My grandfather literally took me. I don't know how old I could have been, not much more than seven or eight.

Morris: He was still running the paper company at that point?
[Zellerbach murmurs assent] And your father and uncle had moved on into the Crown Zellerbach part of the corporation?

Zellerbach: Oh, that hadn't evolved yet.

Education, Career with the Zellerbach Paper Company

Morris: The paper company continued to be something that was owned and operated--

Zellerbach: Stayed separate, yes. It stayed separate.

Let's see if I have the plaque here [moves around room] from when I retired. When I took it over, it had that much. [shows plaque to Morris, whose notes indicate years 1961-1983]

Morris: My goodness! It grew five times as big as when you took over.

Zellerbach: No one had as much fun as I did running a business. I just loved it!

I used to work with a man--I used to drive him home--Fred Whitridge, part of the old Crocker family. We used to say to each other, "We ought to pay them for the privilege of working." We had that much fun.

I got that car--

Morris: In 1938.

Zellerbach: So I was eighteen. That's when I first worked in the Zellerbach Paper Company--for the summer--before going to college.

Morris: As a college kid, what kind of jobs did they give you?

Zellerbach: Oh, messenger, clerk--

- Morris: Learning from the ground up. Did you deal with the suppliers, or were you mostly dealing with the people who needed paper and--
- Zellerbach: Both. In the end, I dealt with everyone. I had a wonderful career.
- Morris: The plaque says, "He led the way." Now, what kinds of things were you getting into?
- Zellerbach: Again, we went back to professional management. My father ran it, and then there was a hiatus of about fifteen years where professional managers ran it. It just sort of floundered. I came in and gave it a breath of life, I guess.
- Morris: That's interesting. I looked you up in *Who's Who*, and it says you went to the Wharton School of Business [University of Pennsylvania], and then it says a while later you went to Harvard Graduate School of Business.
- Zellerbach: Yes, but that was only a three-month course. It was called an "advanced management course."
- Morris: My question is that it looks like you have had the best professional management--professional training. Wharton School has a fine reputation.
- Zellerbach: I had good training for those years.
- Morris: What's the difference between--you had the same kind of training that a professional, non-Zellerbach family member would have had coming in as a company manager.
- Zellerbach: No. The first professional manager was a man by the name of Reed Hunt. He never went to college. His education came from the high seas. He was a man who could weave a tale the like of which you--
- Morris: I could believe it.
- Zellerbach: I mean, you could just sit at his feet, and he could weave tales about what he was going to do with Crown Zellerbach. In fact, he was never trained to run a large corporation.

After he retired, the next man was an engineer. The most important thing to him was his perks and that he had the same kind of perks as the head at PG&E or the head of Chevron. We needed a private airplane like a hole in the head, but

everyone else had a private airplane, so he had to have a private airplane.

Morris: His private airplane--was that for the paper company, or was that for all of the whole Crown Zellerbach Corporation?

Zellerbach: That was for the corporation.

They didn't have their own money in it. They didn't have the genes. I don't think I probably had the genes to run a paper mill, but I sure had the genes to sell paper.

Morris: It was the selling that you liked.

Zellerbach: Buying and selling, managing the inventory.

[shuffling through documents] I'm going to look for something because it's important.

I learned an awful lot from my uncle and from my father.

The Company and the Family Foundations

Morris: It must be difficult to have two brothers running a company. How did they divide up the chores?

Zellerbach: My uncle was older than my father. He ran it, and he ran the Crown Zellerbach Foundation the way he wanted to run it. My grandmother was alive, though not all that with it. So my uncle gave her money away. My uncle passed away quite young [in 1963]. He was seventy-one, a very vibrant seventy-one. Then my father moved in and was giving my grandmother's money away.

Morris: Is this still the company foundation?

Zellerbach: No, now you're going down the road of the Zellerbach Family Fund. By that time, when my father started to do that, he was getting along in years. The Crown Zellerbach Foundation was in the Russ Building. [still riffling through boxes looking for something]

Morris: It sounds as if your grandmother took a great interest in the family business and the family charities.

Zellerbach: No, that wasn't really her role in the family.

- Morris: But she's identified with creation of the Family Fund, and there's the fine photograph of her in the office of the fund.
- Zellerbach: She's identified, but my uncle and father wrote her will. Half of her estate constituted the start of the Family Fund, and that was twelve million dollars.
- Morris: That's a very generous sum.
- Zellerbach: That was half. The other half was distributed to her three children, and I don't think there was more than three or four million dollars distributed to them after taxes.
- Morris: That's an interesting form of mathematics.
- Zellerbach: Well, you see, one was tax-free.
- Morris: Oh, that's right.

Professional Corporate Management Issues

- Zellerbach: [still riffling through papers and boxes] I've got to find this for you. I know it's here. It's a plaque that was on the Crown Zellerbach Building. You know, haste makes waste. Here it is, and this clipping.

"CROWN ZELLERBACH BUILDING

In 1870 Anthony Zellerbach established a small stationery business not far from this site. From the modest beginning, through the passing years, many people have helped to build Crown Zellerbach Corporation.

Crown Zellerbach, a forest products enterprise, is now deeply rooted in the economic life of the United States and Canada. Crown Zellerbach headquarters have always been located in San Francisco. This building, erected in the city of the company's founders, is dedicated to those farsighted pioneers who worked to develop the pulp and

paper industry of the west and, in so doing, wrote a vital chapter in the industrial growth of North America.

January 5, 1960¹

Morris: [Reading clipping. See next page] I see that Equitable has bought the building. This is from an article in the *Chronicle* last February.

Zellerbach: But this quote is from when the Crown Zellerbach Building was originally dedicated.

Let me make a xerox of that for you. Maybe, while I'm making--[Leaves room]##

Morris: Maybe you could write a letter to the editor. They tell me that publicity helps get a little action on some of these issues when people forget what they promised to do.

Zellerbach: Well, they'll do it.

Okay. Have I roamed around enough?

Morris: [referring to plaque] That's really most interesting. So, by the time the new building was put up, you were president of the paper company. Were you on the board of the Crown Zellerbach Company?

Zellerbach: I was on the board.

Morris: Did that mean that you helped plan that new building?

Zellerbach: No, I had nothing to with it. No, you see, that was built in 1959, 1960. I didn't become head of Zellerbach Paper Company until 1961, though later I was on the board of Crown Zellerbach.

Morris: Yes. *Who's Who* has you president of the Zellerbach Paper Company by '61. From that vantage point, were you making suggestions to the Crown Zellerbach Company as to how they did things?

Zellerbach: No. I think the point that I was going to make--before I went through this long rigmarole on stock ownership. My name was Zellerbach, and I was running something successful. The last thing these professional managers really wanted was a

¹Letter, Zellerbach to Donald K. White, February 7, 1989.

Zellerbach running it. That's human nature. They wanted no part of me. That's why they were happy that I was at Zellerbach Paper Company.

I would speak up in the board of directors meetings and say, "We're better off putting our money in U.S. Treasuries [bonds] than wasting it in some of these projects you're coming up with." So I was not all that popular.

I could almost say I am a bitter man on professional managers. You read about [Roger] Smith at General Motors, how he can bring a company down, and see what all these chief executive officers were doing in the savings and loans?

Morris: Did you ever think of going to another company where you could use your skills and not be put down by the other managers because of your name?

Zellerbach: Well, my father was alive, and it would have killed my father.

Morris: It was important for the family to keep--

Zellerbach: It was literally--I just have to write a note to myself. [writes note] He grew up in the era where he had perquisites because they were owners of the business. When his father was alive and he was younger, they owned 100 percent of the business. He always grew up with--

Morris: The family business was--

Zellerbach: This was a family business. He never would really recognize--if I left, it would have killed him. It probably would have killed me, because I was enjoying what I was doing. They were letting me do what I was doing because the rate of return of the distribution business was the best of the corporation.

CZ Foundation Becomes the Montgomery Street Foundation, 1985

Morris: How did your end of the business relate to the Crown Zellerbach Foundation?

Zellerbach: Crown Zellerbach was one of the first to start a corporate foundation.

My uncle had a male secretary, Richard G. Shephard. As I was growing up, I used to think he was quite old, but in fact he probably was only seven, eight years older than myself. After he had done a stint as my uncle's secretary, my uncle made him his assistant as my uncle became more involved in world affairs. Then he became head of the Crown Zellerbach Foundation. I was running the Zellerbach Paper Company, and any capital assets we had which would increase in value, like a building or something, we would give to the foundation. The foundation would then sell it--

Morris: And the assets would go into the--

Zellerbach: The Crown Zellerbach Foundation to build up their corpus. Then there was a bill going through Congress that was passed where there couldn't be any self-dealing in corporate foundations.

Morris: Was this that 1969 Tax Reform Act, or would this be earlier than then?

Zellerbach: It could have been '69. It probably started earlier.

I'm not sure just what caused that, but the chief executive officer at that time, Dick Shephard, interpreted the law his way, completely removed the Crown Zellerbach Foundation, changed telephone numbers, moved it out of the corporate headquarters over to the Russ Building, yet their board of directors always included the chief executive officer of the corporation, the chief financial officer. They absolutely kept it separate. I guess for maybe a five or ten year period of time there was good reason for them doing it, but they just continued the policy of complete independence later on.

Well, Dick Shephard retired, and they had a new executive director, Charles Stine. Eventually, the chief executive officer at Crown Zellerbach was a man by the name of Ray Dahl, who did a miserable job and was removed. When he left the company, they forgot to ask for his resignation from the Crown Zellerbach Foundation.

Morris: From the foundation? Oh, dear.

Zellerbach: So, on the Crown Zellerbach Foundation board you had Dick Shephard. You had a man by the name of [C.S.] Cullenbine. Now he's about eighty-six. He was the chief financial officer of C.Z. They are still alive and still on the foundation. And Ray Dahl, the chief executive officer that was canned.

They would not turn the foundation back to the corporation. This is a self-perpetuating board of directors!

Then the corporation was taken over and ceased to exist as the Crown Zellerbach Corporation.

Morris: Was this when James Goldsmith took over control of the company's stock?

Zellerbach: Yes. They changed the name of the Crown Zellerbach Foundation to the Montgomery Street Foundation, in 1985. I was indignant, not because of personal reasons but because the Crown Zellerbach Corporation had such a philosophy of taking care of their employees.

The employees were very proud to be part of Crown Zellerbach, and here was the corporation going down the tube, so to speak. The one thing they could latch onto was the good things that the Crown Zellerbach Foundation could do.

When Jim Hart talked to me about funding for a business archives project¹, I went to Charles Stine. He thought it was a great idea. I personally went to everyone but Ray Dahl, who still won't speak to me, because he feels I was one of the prime movers of getting him out. At one time, he was a very close friend. [Pause]

They just turned me down cold: "There is no longer a Crown Zellerbach Corporation, so we're changing the name." Here are four people who used to be part of the company saying something like that! To me, Gabrielle, that was--I can't tell you how that cut me to the bone--how these men and how the funds that they were administering all came from Crown Zellerbach. I personally, through the business that I was running, gave them millions and millions of dollars to add to their foundation corpus, and their answer was, "No, we're not going to give this money to some university so some academian could--"

Morris: [laughs] "Rewrite history the way the academics see it?" Is that the general idea?

¹Historical records and an extensive photographic collection of Crown Zellerbach Corporation's paper-manufacturing operations were given to The Bancroft Library by the James River Corporation after its acquisition of Crown Zellerbach in 1985. Cataloguing of these materials, with additions by Mr. Zellerbach and his brother Stephen, has been made possible through the generosity of William and Stephen Zellerbach.

Zellerbach: Yes. You know, just, "Who wants to know?"

So that's how come we personally funded it, not the Zellerbach Family Fund, but my brother and myself. And I could cry.

Morris: I understand that one reason for federal legislation regarding foundations is the thought that it may not be in the best interests of the philanthropic purpose if the foundation is just too close to the company from which the money comes.

Zellerbach: Well, that was true, but you try to find a corporation today that doesn't have a foundation that it doesn't have very strong ties to.

Morris: That is a cautionary tale. So the Montgomery Street Foundation is ongoing?

Zellerbach: It's ongoing, self-perpetuating. I could cry over it.

Morris: Particularly when they're people you've worked closely with at earlier times, yes. Has it changed your ideas at all about the role of philanthropy and how foundations should work?

Zellerbach: No, no. To me, it's very clear. What it really has further fixed my feelings about is the incompetence of many of our chief executive officers that are running our corporations. You see it all the time. Crown Zellerbach itself was run incompetently by the past two chief executive officers. It may seem cruel to say. It had no business to survive, because you could take the same money that they were investing in Crown Zellerbach and invest it in a government bond and make more money. They were not good businessmen.

University of Pennsylvania: Father and Sons' Studies,
Endowments

Morris: Let me back up a minute and ask you how the family got connected with the University of Pennsylvania instead of going to either Stanford or Cal [University of California at Berkeley] which were right here in California?

Zellerbach: My uncle went to California. My father went the first two years to California. Then, in 1916, I guess it was, he had heard of the Wharton School in Pennsylvania. He went and

spent his last two years of college in Philadelphia. There just was no question that I was going to go to the University of Pennsylvania and that I was going to work for the Zellerbach Paper Company. Those were the times when you didn't have any of those free thoughts.

Morris: Was it something that young people felt restless about, or were they comfortable with the roles?

Zellerbach: Oh, it was very comfortable. I mean, it was rote.

Morris: What was it like? What do you remember about the University of Pennsylvania after growing up in California?

Zellerbach: It was a culture shock. It was an unbelievable culture shock. I was just eighteen, not even eighteen, when they put me on the train.

Morris: Anyone else that you knew from San Francisco going to Pennsylvania?

Zellerbach: [shakes head] I got off the train at the old North Philadelphia Station. It was pouring rain. A friend of my father, who was in the paper distribution business, met me at the train and drove me to the dormitory at the University of Pennsylvania.

Morris: That was a help. You didn't have to find your own housing; in those days there was enough dormitory space for everybody.

Zellerbach: Yes.

Morris: Was the Wharton program undergraduate?

Zellerbach: The program I took was undergraduate, and you have to describe it, at that time, almost as a trade school. In my four years, I don't think I had more than twelve hours of electives, if that. It was economic geography. It was Accounting I. It was Accounting II. It was business law. It was statistics. And I feel slighted that I never had a liberal arts education.

Morris: That's interesting that it was that intensive--that you didn't have to do any of this arts--

Zellerbach: My first, freshman year, I think, we had nineteen credits, and two of the credits were English. That was learning to write it.

- Morris: That's important for a businessman.
- Zellerbach: But that was the sum and substance of it.
- Morris: Did you have any time for any extracurricular activities--see anything in Philadelphia?
- Zellerbach: Oh, I'll describe my time in Philadelphia. The first year I hated it. The second year I tolerated it. The third year I liked it, and the fourth year, I would have lived there.
- Morris: That's nice. [chuckles] That's a very good way to describe going away to school, I think.
- Zellerbach: I feel I was very fortunate, and I therefore encouraged all four of my children to go away from San Francisco to college.
- Morris: And did they, by then, take you up on that offer?
- Zellerbach: My older son [John William Zellerbach] went to Wharton undergraduate. During Vietnam, he was in the navy, and then he went to Stanford business school. My number two son [Thomas Harold Zellerbach] went to Colorado College, and then worked in mental health, and only three years ago came back to me and said, "Dad, I'd like to go to law school." He currently, at age forty, is at the University of Pennsylvania at law school.
- Morris: That must be an interesting experience.
- Zellerbach: Oh, it is. It's like having a child return to you--one of the greatest joys of my life.
- My third son [Charles Ralph Zellerbach] went to Williams College and then worked in New York and took his graduate work at Wharton. My daughter [Nancy] went to Colorado College, and then she took her law work at Hastings. All three of my sons had a major part of their education at Pennsylvania.
- Morris: By that time, there was a Zellerbach Hall--am I right?--at the University of Pennsylvania as well as at Berkeley.
- Zellerbach: Correct.
- Morris: That's a very nice gesture. How did that come about? Were the universities looking or were you?

Zellerbach: No, my father gave the initial similar-type grant as we did at California. This was family [Zellerbach Family Fund] and not Crown Zellerbach [Foundation].

I am very pleased because I have just finished giving a chair at the School of Arts and Sciences at the University of Pennsylvania. They just appointed a man to the chair [Frank Furstenburg, Jr.]¹. Because I was denied arts and sciences--the Wharton School had plenty of money, everyone gives to the Wharton School or to the law school--I was going to give it in the arts and sciences. Now, that professorship closely parallels a lot of the work that we're doing, the Zellerbach Family Fund.

Morris: Is it a chair in sociology?

Zellerbach: Yes. University professors are quite independent; whether we can ever pick his brains or he'll ever want to pick our brains on what we're doing here at the Zellerbach Family Fund, I don't know. But it would be my hope.

Morris: You certainly can see that he's supplied with the marvelous information that comes out about some of your projects.

Zellerbach: Oh, they're very nice. They're coming out to have lunch with me. This will be my first meeting.

Morris: This is the first person in the chair?

Zellerbach: Yes.

Morris: And the university asked for your input on the person they appointed to this chair?

Zellerbach: Not on the person, but, yes, they paid very close attention to the field I wanted and tried to match it as close as they could. But I'll tell you in six months or a year what's happened.

Morris: [laughs] That's one of the hazards of philanthropy, isn't it? You can dicker all you want to about setting up the gift, but then what happens to it five or ten years down the line doesn't necessarily work out the way you thought it would.

Zellerbach: Well, that's life.

¹For further discussion, see Chapter III, Academic Interaction.

Morris: So what do you do? Do you go back to the people you've given the money to and say, "Well, you really ought to take a look at this again," or do you just chalk it up?

Zellerbach: Chalk it up.

Morris: Start a new idea and see how that will work. [Zellerbach murmurs assent]

Agency for International Development Advisor

Morris: You have a very interesting career. The other thing I wanted to ask you about today is how you got involved with the Agency for International Development [AID].

Zellerbach: Well, that was just pure luck. They were looking for someone from the West Coast to round out the committee and came across my name. That's about the only thing that--

Morris: I see. This was a presidential appointment.

Zellerbach: Yes. I'm not even a Democrat.

Morris: That was what I was wondering. Presidential appointments often have--

Zellerbach: The committee was a superb committee, and even David Rockefeller was on it. There had to be more Republicans than Democrats. Bill Hewlett was on it.

Morris: Did you ever have a chance to meet with Lyndon Johnson or talk with one of his aides as to what they had in mind?

Zellerbach: [showing photo] Here's my picture with him [President Johnson]. And I said, "I'm not going to let that sucker edge me out of the picture." [pointing to each man of committee] And that's George Andreas. He's a big Democrat. That's Alfred Gunther. He was a great general in World War II. There's Bill Hewlett. This was the president of the Rockefeller Foundation. There's David Rockefeller. This man was the head of Tuskegee University. No, no--[pointing to another man]--he was president of Tuskegee. This is George Bell. [referring to woman] Her name was Chase; she came from the RCA fortune.

Morris: What I wanted to note on the tape is that the appointment from the president notes your "integrity, prudence and ability."

Zellerbach: But, you know, they put that on anything. [laughter]

Morris: What was the White House looking for in this advisory committee?

Zellerbach: Well, this was when the whole aid to the Third World was just--I don't think it had been more than four or five years old. They were just formulating that whole policy. So we sat in judgment of what was going on, and we would make trips out into the field, and, I guess, just gave general advice to the president.

Morris: Was there somebody on his staff who was in charge of this commission?

Zellerbach: There were two or three people.

Morris: Who would those have been?

Zellerbach: One was George Bell. I forget his number two assistant.

Morris: Most of the AID programs that I'm familiar with were in South America. Was your work primarily about South America?

Zellerbach: Yes.

Morris: Was there anything from that experience that gives you any clue as to some of the troubles that have been in South America in recent years, where the countries seem to have a lot of trouble with their internal stability?

Zellerbach: Well, this would be an off-the-record comment, but I remember visiting Natal, right on the equator. We would see people with kids, and kids, and kids, and kids, and kids. And then to have the Pope come out and encourage them to have children--there was just the hopelessness of the situation. So as you can see, I'm very much pro-choice.

Morris: That's twenty years ago now, and more. Were some of the AID programs concerned about population?

Zellerbach: Oh, very much so. There was the Peace Corps too.

Morris: Did the work overlap with what the Peace Corps was doing somewhat?

Zellerbach: No. When we would go and visit these places, you were always intertwining with the Peace Corps.

Morris: Oh, that's great. The Peace Corps kids would come and--

Zellerbach: We would go out to where they were.

Morris: So some of the Peace Corps programs were related to the AID programs?

Zellerbach: I think they were more complementary. There was a separate fiscal budget, but the AID program would be starting businesses.

Morris: A couple of points: the AID program ran into some political static. Would that have been while you were on the advisory committee?

Zellerbach: We were still too new.

Morris: So your committee was to help get the program set up?

Zellerbach: It was really during that stage. Of course, David Rockefeller was the moving force, if you recall, of the whole idea of aid to South America. His roots--

Morris: Had you had some contacts with him before in the philanthropy business?

Zellerbach: No.

Morris: Listening to your comments on the people on the commission, it's sounds as if there were quite a few people with a lot of experience with philanthropy and education rather than political people as such.

Zellerbach: I think George Andreas was the only political person.

Morris: Was that the first time you had gotten involved in the international aspect of--

Zellerbach: I would have to say the first and only time. My whole philosophy was, and still is, they were paying me a handsome salary to work.

Morris: This is the paper company?

Zellerbach: Yes. They weren't paying me to be an international scholar. I also had four children. They were very important to me.

Morris: And to be here while they were growing up and--

Zellerbach: Yes.

Establishing the Hunters Point Boys Club, 1959

Morris: [pointing to document] Is that a Boy Scout citation I see on your wall?

Zellerbach: No, that was from the Boys Club. I even have my picture with Herbert Hoover.

Morris: I noticed that. How did you get acquainted with Mr. Hoover?

Zellerbach: I was on the executive committee of the San Francisco Boys Club. The San Francisco Boys Club was an arm of the San Francisco Rotary Club. I'm going back quite a few years.

Morris: I didn't know that; that's very interesting.

Zellerbach: A fellow member of the executive committee was Walter Haas, Jr. The Housing Authority, which had charge of buildings out at Hunters Point came to the San Francisco Boys Club and asked, if they supplied the bricks and mortar, would the Boys Club put a branch out there. The San Francisco Boys Club would not allow blacks.

Morris: Really? This is when, the mid-fifties?

Zellerbach: [sound unclear] Yes. It had to be the late fifties, because--

Morris: Right. This plaque is dated--

Zellerbach: It was the late '58-'59.

Morris: This medallion for devoted service, from the national awards committee, is June 1963. So that's after you had been at this a while.

Zellerbach: How we got there is, the executive committee of the San Francisco Boys Club turned them down. Wally and I said, "We will take it on," and we resigned from the San Francisco Boys Club. I'm the founder, because he said, "Bill, I'm going to give you all the help you want, but you're going to--" And he did. So, really, it's Wally and myself.

Morris: That's great. Had you realized before this event that the Boys Club had a membership exclusion in it, or had it just never come up before?

Zellerbach: It really never came up, because those things--they were not really topics of conversation.

It was a tremendous experience, and I still carry wounds because--I'm sure you've read the annual report of the Family Fund, how much we're doing for the black families in East Oakland. My great disappointment over these three decades is the lack of progress the black male has made. Part of our desire as we were forming the board was to get blacks on the board. I would go out to churches. I went out everywhere, and it was almost impossible to recruit anyone.

Morris: Because they didn't have the time, or they hadn't had the experience in being on a board of directors, or they didn't see the need of a Boys Club?

Zellerbach: I don't know--they just weren't ready to join us.

Morris: What was the Housing Authority's idea?

Zellerbach: Because the Housing Authority took over the old Hunters Point housing, the naval housing up there.

Morris: Right, after--

Zellerbach: After the war closed. They had all these houses with this huge black population, and they wanted a place for them to--

Morris: Were there problems with youngsters getting into trouble and dropping out of school?

Zellerbach: Oh, terrible problems. Same problems as today.

Morris: Yes, it does sometimes seem like we haven't made too much progress.

So what did you do for a board of directors then?

Zellerbach: Well, we took our peer groups, and we had two or three blacks on it. That's how we started it.

Morris: Do you remember who those first people you recruited for the board were?

Zellerbach: Well, sure. There was, of course, Wally Haas, Carl Livingston, Bob Reese, Al Schwabacher, a man by the name of George Treat. You're really taxing my memory. Bill Kemp was on it, Tom Witter. One of the prominent black members was Arthur Coleman, but to get him to come to meetings or to give money was a chore.

Morris: Did you get some money from the Housing Authority, or was it just the space that they provided?

Zellerbach: It was primarily the space.

Morris: Who from the Housing Authority was the contact person on this?

Zellerbach: The head of the San Francisco Housing Authority. I can't come up with his name.

Morris: Maybe I can track that down.

The buildings had been there a long time, but there hadn't been any previous kind of a youth program there during World War II or Korea?

Zellerbach: No. We sent the Hunters Point Boys Club--just to show you, after we had it founded, had our program going, we sent them up to the San Francisco Boys Club camp up--

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And the San Francisco Boys Club, the only way they would allow the Hunters Point Boys Club to go to their camp is if they went by themselves at the end of the regular San Francisco Boys Club camping season. So we got the last two weeks. You look back, and that's really how far we've come.

Morris: Amazing. And this camp was run by the regional Boys Club organization?

Zellerbach: No, no. It was the San Francisco Boys Club. They ran it.

Morris: The whole summer?

Zellerbach: [murmurs assent] They owned the property.

Morris: Oh, my goodness. Did that take a little conversation with you and Mr. Haas talking to the Boys Club people to--is that the way to behave in 1960?

Zellerbach: Well, we were two, three decades younger than their board. There's no way you're going to talk to those people. The best way that we talked to them is by resigning from the executive committee and the board of directors of the San Francisco Boys Club.

Morris: And did that create some consternation?

[Pause]

Origins of the Guardsmen, Rotary Connections

Morris: The people you had on your board were a pretty potent group.

Zellerbach: Well, now, remember the Boys Club had just started an organization called the Guardsmen.

Morris: Yes. Was your Hunters Point Boys Club a Guardsmen offshoot, too?

Zellerbach: No, but most of these people on our board were members of the Guardsmen. We never had any bonding with the Guardsmen and this San Francisco Boys Club, but Wally Haas was president of it. Carl Livingston was president of it.

Morris: Of the Hunters Point group?

Zellerbach: No, no.

Morris: Of the Guardsmen?

Zellerbach: Of the Guardsmen. So it was my age peer group and, I guess, thirty years ago, so we were in our mid-thirties.

Morris: So the Guardsmen were a good source of recruits, is that what you're saying?

Zellerbach: Yes.

Morris: I don't think I've ever heard anybody tell me how the Guardsmen came to be started.

Zellerbach: Well, for that you ought to go to the horse's mouth, people like Wally Haas or Al Schwabacher, people like that.

- Morris: Okay. And why weren't you a member of the Guardsmen, since it's a peer group thing?
- Zellerbach: I was a member, but I never was a good member because, again, going back. I've never been a good club member because I have these awful beliefs that--I had to travel a lot. I couldn't see myself going out at night; my place was home with the family.
- Morris: But you did somehow do the Rotary Club, am I right?
- Zellerbach: No, I never did.
- Morris: Oh, I thought that the Boys Club was a Rotary project.
- Zellerbach: No, no. The Boys Club, the executive committee were all the people who ran the San Francisco Rotary Club, so it was not an official tie of the San Francisco Rotary, but it was a major project of the San Francisco Rotary.
- Morris: Okay. I'm familiar with that, with the service groups starting specific projects that they think are good for the community that then take off on their own. But Boys Clubs of America is a national organization.
- Zellerbach: And the San Francisco chapter was an offshoot of the do-gooding of the San Francisco Rotary Club.
- Morris: Okay, but not a project of the Rotary per se.
- Zellerbach: No, no.
- Morris: I'm sorry to be obtuse. It's just that the organizational world is very intricate, and trying to sort it out is helpful.

On Being a Father

- Morris: Did you have a lot of activities that you did do with your children, either as a group or individuals type of thing?
- Zellerbach: Oh, everything.
- Morris: What kinds of things did you enjoy doing?
- Zellerbach: Well, during the summers, we had all these branches in the Western part of the United States. Three or four years, we

piled into a station wagon. First there were two kids, then three, then four. We would drive to all these locations, and then I would take a week off at Yellowstone, or two weeks. I had no way to converse with my boys, so I bought a thirty-two foot Chris Craft. You're looking at a man that never upgraded the boat he owned.

Morris: You kept using the same boat?

Zellerbach: The same boat. It never got better. It was a great place for the family, and it was a great place for me to take my individual children, one-on-one, two-on-one.

Morris: Where did you keep that?

Zellerbach: Kept it over at the San Francisco Yacht Club in Tiburon. My wife [Margery Haber Zellerbach] hated it. I don't blame her. She was bored to death on it, scared to death.

Morris: Really? She's not a boating lady?

Zellerbach: No.

Morris: How about your daughter? Did she enjoy it?

Zellerbach: She enjoyed it because she was the youngest of my four children. Anything the boys liked, she liked. That was a "Me, too."

Morris: But, earlier, when you say you toured them around--that means they all got to see where there were paper company locations and things like that?

Zellerbach: Oh, yes.

Morris: Where the lumber companies are, where paper comes from. That's great.

Zellerbach: And every Christmas--one of the great indulgences of having wealth, we all went to Hawaii over the Christmas holiday, out to the old Royal Hawaiian Hotel. We had a very, very close family.

Morris: Did working on the boat and cruising on it provide an avenue for getting closer to your sons?

Zellerbach: Oh, yes.

Morris: Working on things mechanical?

Zellerbach: Or just going out.

Morris: That's great. Have they continued to be boating--

Zellerbach: No. Happiest day of all our lives, I think, was when I sold it.

Morris: [chuckles] When you sold the Chris Craft.

Zellerbach: I think we had it for thirteen years. When my daughter was the only one home, I sold it. I never looked back.

Morris: Really? You didn't enjoy it that much yourself other than--

Zellerbach: It was a just a means to do something with the kids.

Morris: That was very clever of you. Did you ever suggest boating as an activity for the Boys Club or similar father-and-son activities?

Zellerbach: Yes. We took the Hunters Point Boys Club over to Angel Island. It was hard to believe 90 percent of those boys had never even seen the bay or been on a boat.

Morris: You run across that comment again and again, and it is unusual, particularly in an area like this that is so compact and you can kind of walk a couple of blocks and--

Zellerbach: Oh, it was a tremendous learning experience. As I said, one of my great disappointments is that the black male hasn't had more equal opportunity in our society.

Morris: Did you spend much time out there at Hunters Point with the--

Zellerbach: Oh, a tremendous amount of time.

Morris: At board meetings or the activities?

Zellerbach: The whole schmeer.

Morris: Were you still active there when Ron Dellums and Herman Gallegos were on the staff?

Zellerbach: No. I was active for ten years, and then I left. That was it.

Morris: Had you given yourself a time limit of ten years, or did it just work out that way?

Zellerbach: It just worked out. I mean, you have to go on to other things.

Morris: That's true, but that's what I was getting at, whether you had--

Zellerbach: I had done everything, and, of course, as I grew older, my responsibilities in the business and the family started to--

Morris: Oh, absolutely, absolutely.

I know you said that you had a lunch date you need to get--

Zellerbach: I have to leave at twenty minutes to twelve.

National Paper Trade Association: Ecological Questions

Morris: Okay. One of the things I wanted to ask you about is, I see that you were president of the national trade association in the paper industry. What does that involve?

Zellerbach: Well, that is the national association, where everyone has a place to go to a convention, so the National Paper Trade Association is all the various paper distributors throughout the country.

Morris: Is that something where you automatically go through the chairs?

Zellerbach: You go through the chairs.

Morris: Was this something that you looked forward to, or was it a responsibility of being a leading distributor in the field?

Zellerbach: I have to say most everything I do I've enjoyed because I enjoy people. I met super people, and I think during my four years through the chairs we did a lot of good. So it was a learning experience. I still have very close friends that I made by going through the chairs. And, right over your head, they gave me the first award.

Morris: [turns to admire plaque] Oh, that's beautiful. That's a really beautiful piece of illumination. [reading plaque] Who is Stanley Styles?

Zellerbach: He was one of the original paid executives. About the time I got the award, he was about eighty-five.

Morris: Yes, this says, September '84.

Zellerbach: And now I was the first. They're up to about the seventh person to receive that award.

Morris: Had you known Mr. Styles and worked with him?

Zellerbach: Oh, yes. I greatly admired him and loved him.

Morris: It sounds like he is somebody out of the ordinary in the way of professional management.

Zellerbach: He just was a fine human being.

Morris: In those years, were you yet dealing with what's become rather noisy a public issue about saving our trees and not cutting--

Zellerbach: Oh, that was--

Morris: The whole forest preservation and--

Zellerbach: That was a very popular subject--clearcutting. Of course, to me this is one of the greatest examples of the misinformation that the public gets. All I have to do is invite you to go out to the Presidio, take a look at those trees that have never been thinned. Open spaces have been made for regeneration, and there are parts of the Presidio where the trees are dying. They're falling over. There's no new trees coming up because they haven't been thinned. Such a lack of knowledge of good forestry practices. If you prune trees, they grow bigger. It's a crime.

Morris: Is this something that the trade association--

Zellerbach: No, no. Now I'm talking of my corporation, but National Paper Trade Association was only involved in assisting paper distributors, like the Zellerbach Paper Company. The size of the member companies ranged from five hundred million dollars worth of business to distributors that were lucky to do two or three million dollars of sales a year.

Morris: Really? There's quite a range, then, in the sizes.

Zellerbach: Oh, tremendous.

- Morris: Once the paper is made, you don't have to deal with the same kind of issues about ecology and environmental protection?
- Zellerbach: We never dealt with that, because the paper products we sold--we sold janitorial products, we sold commercial stationery.
- Morris: The finished product.
- Zellerbach: We sold the finished product from hundreds of manufacturers.
- Morris: But at one point, and it continues today, there was emphasis on using recycled paper and you should be--
- Zellerbach: We made a lot of money selling recycled paper.
- Morris: Really?
- Zellerbach: Really.
- Morris: Is that a more profitable item?
- Zellerbach: It was more profitable, because it was hard to find a source of supply. You get a better trading margin on it.
- Morris: I was thinking about your experience with AID. We now have a lot of noise about the rainforests. I gather that there are some problems in South America.
- Zellerbach: Now, that is a tragedy. That's entirely different than what I was talking about--going to the Presidio and thinning trees out.
- Morris: Why is that? How is the rainforest different?
- Zellerbach: The rainforest is a hardwood forest. The kind of forest that I was talking to here is the softwood--it stays green all year. The whole climatic--the whole thing is so different there. The rainforest is important, because if you don't have the rainforest, there's no place to hold that water and the land is eroded. That's not what you're talking about in the Northwest or Northern California, where you're not cutting a forest down. We're getting way off the subject, but we can spend a lot of time on it. And I'm not the most qualified man to speak on it, but heck, when I went into the business, you would grow a fir or a hemlock--it took eighty years to get it to a good size. When I left the business, we were growing the same tree in fifty years.

- Morris: Fifty? Almost half the time. Isn't that amazing?
- Zellerbach: Yes, and that was by culling out, getting the right seeds, doing artificial tree planting.
- Morris: But hardwood grows faster?
- Zellerbach: It grows very quickly, and you find hardwood in the tropics. You find hardwood in all the various riverbeds. It's all hardwood.
- Morris: But the pulpwood is the--
- Zellerbach: The pulpwood is both softwood and hardwood. They make it out of both, but there are only so many forests. If we clearcut and there are no more forests, say in the Northwest or Northern California, you would have a sudden ecological disaster.
- Morris: Was this something that you got interested enough in that you would raise the question at the corporation board meetings and things like that?
- Zellerbach: I didn't have to raise the question. The corporation, through every one of its chief executive officers--the one thing that was consistent was their consistency in growing trees. They were *dedicated* to growing trees--dedicated.

Corporate Takeover, 1985

- Morris: Even after James Goldsmith arrived on the scene?
- Zellerbach: Oh, when Mr. Goldsmith came, that's the first thing he did. He stopped all silva culture projects.
- Morris: Could you see the situation coming where somebody would be interested in taking over the firm, or did Goldsmith come out of nowhere?
- Zellerbach: Oh, no. He just came out of the blue.
- Morris: That must have been kind of a distressing experience to go through.
- Zellerbach: Oh, it was a horrible experience. It was a shock, still is a shock.

Morris: What was the first warning that--

Zellerbach: Well, Gabrielle, it was the same as every other takeover. You walk in, and one day there's a telegram on your desk: "I just bought control of your company."

Morris: It didn't happen overnight, did it? There was sort of an elaborate process of going back and forth and the stockholders were going to take--

Zellerbach: You could put it in the same kind of a time frame as when Germany went through the Lowlands. Those countries put up a little resistance, but pow! When they decided to go, they went, and that was it.

Morris: That was your sense, that Goldsmith had it all planned out, and it was going to happen regardless of what the Crown Zellerbach Corporation did?

Zellerbach: It was going to happen, nothing you could do to stop it, because he owned the stock.

Morris: And the people in the financial end of the corporation didn't have any inkling that this was coming?

Zellerbach: They had an inkling, but their hands were tied because they didn't own the stock. The family no longer owned the stock. The stock was out, owned by everyone, and someone comes in and says, "I'll pay you ten dollars more for the stock than you would get on the New York Stock Exchange." No one cares that people are going to lose jobs. No one cares if the trees are not going to be tended to.

It was a devastating period for U.S. industry.

Morris: Yes. Is your sense that it has run its course, that the takeover activity is not going to be that great any more?

Zellerbach: It's still going to be there. Remember, I started the conversation out by saying Crown Zellerbach deserved to be taken over because it was not an economically successful company in the latter twenty years of its life.

Morris: So from that point of view you could see it coming?

Zellerbach: It's going to happen to any company.

Morris: Yes, interesting.

Well, why don't we stop there for today, and if I have not worn out my welcome, I would like to come back and talk to you again.

Zellerbach: Oh, any time.

[Pause]

II UPDATING THE ZELLERBACH FAMILY FUND

Consultant's Report Suggestions, 1968

Morris: One of the things I'd like to ask you about next time is how you happened to bring in a consultant to study the Zellerbach Family Fund?

Zellerbach: I had been on the AID committee with Rockefeller. My father was growing older, and the Family Fund was mostly giving the bricks and mortar kind of grants. I thought we should be doing something more.

David Rockefeller gave me the name of the Heald, Hobson consulting firm; Heald used to be head of U.S. Steel. This little firm wrote out a twelve-page report that has had a big impact on our Family Fund¹

[Tape unclear]--of course, what people preach is, "You are not a private thing. You are here by the grace of the taxpayer, and you're quasi-public." Again, if you look at our annual report, you'll see that's pretty much the direction we took the fund.

Morris: And you got the name of the consultant from David Rockefeller. That's interesting. I had wondered about that, how you connected with an East Coast company to come and do the study for you.

Were there any surprises in what that study said, did you think?

¹"Zellerbach Family Fund, Review and Recommendations," Heald, Hobson and Associates, New York, N.Y., November 1968. Copy in supporting documents.

Zellerbach: The most wonderful surprise was that my father accepted it. I thought that was tremendous.

Morris: Did you think he wouldn't want to have the study done?

Zellerbach: Well, he resisted, because he loved to go out to lunch, and someone would say, "I'll give fifty thousand." And Dad would say, "I'll give fifty thousand." It would all come out of the Family Fund.

Morris: Yes, that's the old-style fundraising, and that's still a very successful and popular form of fundraising.

Zellerbach: You can look at my history, and you'll never find that I've taken one penny of the Family Fund for any charity that I would happen to be an officer of.

Morris: Does that mean that you have to have your own separate bank account if there's something you yourself are interested in seeing get funded?

Zellerbach: I gave the chair at Penn myself, out of my personal resources. The Family Fund didn't do it. No member of the board of the Family Fund ever receives a request for funds. It all has to go through the staff.

Morris: Do you sometimes have to have a little talk with the board about, "This is the way we do things around here"?

Zellerbach: We've done it now that way for ten years.

Morris: Good for you.

[Interview 2: April 27, 1990]##

Morris: Ed Nathan gave me a copy of the Heald, Hobson report. It's really a remarkably intelligent and concise report. You could offer it today to anybody considering a reappraisal of what their foundation was doing.

Zellerbach: I've sent it to two or three people.

Morris: People here in the Bay Area?

Zellerbach: No, friends that I have had around the country or people in foundations I've met at meetings.

Morris: Have you spent much time at Council on Foundation meetings?

Zellerbach: Very little. It's a terrible thing to say, but most of the stuff we're doing is out beyond what a lot of people are interested in doing.

Morris: Yes. Have you had an interest in encouraging other people to try some of the kind of things that the Family Fund has been doing?

Zellerbach: No. I mean, I've tried a couple of times, but if a person wants to give their money away the way they want to give it away, that's it. Period. Over and out.

Now, Claude Hogan at Van Loben Sels Foundation has gone to Ed Nathan. A lot of people have gone to Ed Nathan seeking advice. But giving is such a funny thing, or a personal thing, that people tend not to listen if you try to preach the thesis that the Heald, Hobson report preached, which is, "Hey, this is a quasi-public foundation, and you owe it to society to manage it that way." [Telephone interruption]

Sorry, I meant to have my calls held.

Personal and Foundation Giving

Morris: Why do you think it is that, within the framework of regulations and legislation, that people are so personally insistent upon doing things their own way in philanthropy?

Zellerbach: Well, I can see--I watched my grandfather, who I mentioned really was the stemwinder for making the fortune for the family. He wouldn't give a penny away. So his two sons and daughter come along and inherit this kind of money, and they had no problem giving his money away. When he passed away, and before there was a Zellerbach Family Fund, they gave their mother's money away at the same rate that we are giving it away at the Family Fund. But they gave it away to bricks and mortar and to *quid pro quo*.

Morris: Did your grandfather not have an interest in some of the civic organizations that were founded when he was making it--

Zellerbach: Oh, he was just against giving his money away.

Morris: Remembering hard times?

- Zellerbach: Remembering hard times, so I think you go through cycles.
- Morris: Yes, that's possible. But I was thinking also that San Francisco a hundred years ago had several groups of people who got together to start the hospital or to start the symphony and things of that sort. Did your grandfather contribute to those subscriptions?
- Zellerbach: Oh, he wasn't in on that, no. My grandmother would give to Temple Emanu-El. That she would give to, and that he would go along with, because she would be insistent. In the Family Fund, we still continue to give to Temple Emanu-El. That's one of the few items that is an exception to our published giving policy, because it was my grandmother's love and interest, and it was her money that started the fund.
- Morris: So there is room in the foundation's policies for some traditional grants to organizations that have been important to the family?
- Zellerbach: Well, this is the one that was important to her. The other part is, in traditional grants, that we feel--and again it goes back to that statement I gave you on the foundation¹--that we are a part of the civic organization of San Francisco, that we have to give to traditional things like the United Way, the Jewish Welfare, the symphony, the ballet, opera, all these. I think we give \$10,000 gifts to each of them. Then we participate in all their major campaigns.
- Morris: Just as a matter of operating support, not going through the application and review process?
- Zellerbach: That's right.
- Morris: I can understand that, since those organizations are part of the structure of the San Francisco community, I think.
- Zellerbach: Yes, and they were supported by my uncle and father.

¹Policies and guidelines leaflet, Zellerbach Family Fund. See Appendix.

Jewish Causes. Fundraising Experience

Morris: Were they or you, in your turn, active in some of the specific Jewish Welfare Federation fundraising campaigns?

Zellerbach: No, I never have, and the family never has. I've always had a principle that I'm going to give as much to the Welfare as I would give to the United Way. I would not allow--

Morris: One to outweigh the other?

Zellerbach: Outweigh the other. Now, I am an exception, and a lot of my friends don't approve of how I give my money away because they give such huge amounts to the Jewish Welfare.

Morris: I know that in the fifties, certainly, and on into the sixties, there was a lot of interest in support for the state of Israel that went through the various Jewish organizations. I wondered if--

Zellerbach: During the fifties and sixties, we did support it to a greater degree. But they're still supporting Israel just as much today as they were in the fifties and sixties.

Morris: You could look at that as exceptionally effective fundraising by the people in charge of that in Israel.

Zellerbach: Oh, they've been brainwashed.

Morris: And where are you on that debate as it has become more a matter of wider public policy discussion?

Zellerbach: Oh, I don't debate that. That's personal. When they start putting their people on me, I say, "I won't give you anything. Just send me the slip, and I'll give what I feel like I want to give." So that's how I've been for the last fifteen, twenty years.

Morris: Does that have an effect when you go to people looking for some support for a project that you are interested in?

Zellerbach: I rarely ever do it.

Morris: Really?

Zellerbach: And if I do it--like I've done it a bit for the symphony and a bit for Mount Zion Hospital--I wouldn't solicit people who

would come back to me. For Mount Zion, I've given as generously as most anyone. I had no problem.

Morris: But you've managed to avoid the, "I'll give to your project if you'll give to mine."

Zellerbach: I will not do that.

Morris: How did you manage to avoid it? I've talked to so many people who say, "Gee, this is sort of the way it was when I came into community activities, and so I've kept--"

Zellerbach: I just won't do it. That's all.

Morris: Good for you.

Zellerbach: I think I mentioned, and if not, Ed Nathan will and I certainly will corroborate that for the past six, seven, eight, nine years there has not been a Family Fund director that has brought a project into the foundation. So I have no one coming to this office soliciting for a Family Fund contribution because I just won't do it.

Harold Zellerbach's Interest in Downtown Business and the Performing Arts

Morris: That's interesting. Another detail that I came across in the Heald, Hobson report was a reference to the Blyth-Zellerbach Committee. I have heard people talk about that group's activities in the forties. I wondered if that was still active when you became interested in civic affairs and if you've sat on it.

Zellerbach: That rolled over, I believe, into SPUR [San Francisco Planning and Urban Renewal Association]. As these things come of age, why, they get very political and very--so I give my personal donation to SPUR, but from not the Family Fund.

Morris: So you see it as something that has kind of matured and become an institution in its own. I remember hearing it spoken of as something that was called--the members of the committee called themselves together when they saw a need in the community for some leadership.

Zellerbach: And the times in San Francisco were almost identical to what we're going through today, where--there was no building going

on in San Francisco, no commercial building. The city government had really just stagnated. And it was the Blyth-Zellerbach Committee that got things moving. The first two buildings that were built after the committee was formed were Number One Bush [Street], the Crown Zellerbach building, and the John Hancock building, down on Battery and California [Streets]. Those were crowned as the two new additions, but those were the first buildings that were built in downtown San Francisco of any size after the war [1945]. The Equitable building was built (which is this building, 120 Montgomery Street) after the war, but otherwise there was nothing.

Morris: Because there was no interest in the city government or no ability to put together the financing?

Zellerbach: There was no leadership, I guess.

Morris: So that committee had pretty well dissolved by the time you began to take an interest?

Zellerbach: By that time I was working in the commercial world, and I was too young to take days off to go to committee meetings.

Morris: It took the senior business leaders to put something like that together. Do you remember your father or your uncle talking about what needed doing?

Zellerbach: Not really.

Morris: By the time the Hobson report came out, were you already thinking about finding somebody to take over as executive director of the Family Fund?

Zellerbach: Well, there was no executive director. I had to sell my father on that. As I told you the last time, after my uncle died, my father became the head of the Family Fund, which was my grandmother's money. Even though my grandmother lived to ninety-five, ninety-six, he was able to do whatever he wished with it.

My father was the principal stemwinder in building Davies [Symphony] Hall. Without my father's efforts in the early years, there never would have been a Davies Hall.

Morris: How come it's got Louise Davies's name on it and not his?

Zellerbach: Because she came in with this tremendous gift of seven, eight, nine million dollars. My father's name is on the opera rehearsal hall on Franklin Street. You walk down Franklin

Street, you'll see the Harold L. Zellerbach Rehearsal Hall. My father had passed away by the time they opened Davies Hall. Everyone who spoke at the opening of Davies Hall would acknowledge the fact that this would not have been unless it had been for my father. He followed it through, step by step.

Morris: It had a long history. Didn't he have a plan for a bond issue at one point for public funding for a performing arts center?'

Zellerbach: Yes, where the new library is now supposed to go. Oh, he was centered on that for the last fifteen, twenty years of his life. That was his major interest.

Morris: Did he get you involved in that?

Zellerbach: No, I never got involved until he passed away, and then I had to--I didn't have to, but I felt that I should follow through on what he had started. I was involved when we were wrapping the whole thing up.

Hazards of Quid Pro Quo Fundraising

Morris: That was what you meant when you said you did do some fundraising for the symphony?

Zellerbach: Yes, because then I became a member of the executive committee. When you're on the executive committee, you raise money.

Morris: This is for Davies Hall, separate from the symphony itself?

Zellerbach: Both. You have to put the two together.

Morris: Okay, I just wanted to make sure, because sometimes I miss a committee here and there. There are all these things going on.

I came across a reference to the fact that Phil Boone, who had been involved with your board and close to your

'See Harold L. Zellerbach, Art, Business, and Public Life in San Francisco, Regional Oral History Office, University of California, Berkeley, 1978.

father, had at one point been thought of as somebody who was going to see to it that the performing arts center got built.¹

Zellerbach: Well, Phil Boone was a disciple of my uncle and then became a disciple of my father. Phil Boone was one of the Zellerbach Family Fund directors on the original board. Phil Boone was on that board.

Morris: But I remember Sam Stewart as being the person who was the most visible toward the end, in putting the funding for the Performing Arts Center together.

Zellerbach: Well, Phil Boone had this accident. He had a stroke which incapacitated him for about five years. Sam Stewart had the loud, loud voice, but Phil Boone would have to be right up there. In fact, he would be ahead of Sam Stewart, and Brayton Wilbur would go and see Phil Boone consistently for advice and counsel.

Morris: When Mr. Wilbur took over?

Zellerbach: Yes. Phil never had wealth and couldn't quite get over the complex that he didn't have the wealth that the Brayton Wilburs had and the other people had to give tremendous donations.

Morris: Is that a problem when you're trying to put together a group to complete a project?

Zellerbach: Oh, when you start an organization or a project it's easy to get into *quid pro quo* giving. That's how my father used to give and my uncle used to give.

Morris: "You can afford to give this much, therefore we are going to put you down for that much."

Zellerbach: That's right.

Morris: That's one of the questions that is often debated in nonprofit organizations: how do you balance out the contributions of the board member who makes big gifts with another member who's got time and talent but maybe doesn't have the money? How can you make them feel like they're needed and doing something useful?

¹See Philip S. Boone, The San Francisco Symphony, 1940-1972, Regional Oral History Office, University of California, Berkeley, 1978.

Zellerbach: Well, I think this is what the head of the organization has to do when he seeks out his board of trustees. Where you need to raise money, you divide it up very carefully: those who you put on to give and those who you put on to work.

Morris: It must take quite a lot of skill to make those people comfortable with each other.

Zellerbach: Yes.

Morris: Is that the executive director's role, or is that more the chairman of the board?

Zellerbach: Oh, it has to be the chairman, because your executive director, if he doesn't have a strong chairman, gets caught in the wind between this project and that project.

Morris: His role, or hers, is more to keep things moving along than to keep peace between trustees?

Zellerbach: Well, like we have Ed Nathan's position. It's really Ed Nathan who brings to the board the thoughts and the programs that he sees as being very viable. So the board really is not the influence or the direction. It's really the executive director, if you have the right executive director, and the board has complete confidence in him.

Morris: So that ideally, the new ideas and the new suggestions for direction come from the executive director.

Ed Nathan Becomes Executive Director, 1972

Morris: What were you looking for when the board decided you wanted to have an executive director?

Zellerbach: There was no board. There was my father and myself and Phil Ehrlich, Sr., who was the attorney for the family for fifty years.

Morris: He also had quite a distinguished career in good and welfare, as we used to say.¹ I understand he had quite a few personal philanthropies.

¹See Philip S. Ehrlich, Sr., in Bay Area Foundation Leaders, Vol. III, Regional Oral History Office, University of California, Berkeley, 1976.

Zellerbach: He made his money himself. His son, Phil, Jr. is giving money away, but his father was just like my grandfather.

Morris: [chuckles] Well, that's another kind of philanthropy.

Zellerbach: I have to just give tremendous kudos to Phil Ehrlich, Sr., and my father for allowing me to go out and get the Heald, Hobson report and have them buy off on it.

Morris: Did it take some doing for you to convince them that getting in a consultant to take a look at the Family Fund was a good idea?

Zellerbach: Well, that took a little doing. Then, my finding Ed Nathan took a lot of doing. It took a lot of doing on Ed Nathan's part at educating my father about some of these projects that to Dad, to Phil Ehrlich, Sr., were way, way out. They just didn't fund those kinds of things.

Morris: But had your dad and Mr. Ehrlich decided that it was okay to turn things over to you, that it was time for you to take over and run the foundation?

Zellerbach: It was a very gentle osmosis. I just have to give my father and Phil Ehrlich--because Phil Ehrlich, Sr., was really a servant of the family. Then my father predeceased Phil, Sr., and I think the last five or six years of Phil, Sr.'s life, the Family Fund was the most meaningful thing in his life. He absolutely just adored working with Ed and bought off on everything he suggested.

It was a thrill for me to see these men--of course, my father, and the same is true of Phil Ehrlich, Sr., who I was so terribly fond of--who had always done something one way, accept this fund we put together which, right at the start--and I think we are still--was at the cutting edge of giving.

Morris: How did you go about finding an executive director then?

Zellerbach: I knew Ed Nathan from the time we were about five or six years old. We were both members of the Concordia Club. It was a practice that when you became six, seven, eight, you went down there for physical education on Tuesdays and Thursdays after school.

Morris: Oh, now I always thought it was a dignified, older gentlemen's club for lunch and serious discussion of world-shaking affairs.

Zellerbach: No, they had a beautiful athletic department, and they had a physical education director by the name of Hoyt. All my Jewish peers were members down there, and Hoyt Woods divided the group up into Blue and Gold for basketball or for boxing competition.

Morris: Was that a little influence of the university there?

Zellerbach: And Ed Nathan was captain of the Blue or the Gold team, and Richard Goldman was captain of the other team.

Morris: Oh, that's marvelous.

Zellerbach: Ed was always the smallest but was one of the most beautifully coordinated. Where most everyone else in that group went out to make a commercial fortune, Ed went out into the public health sector. We didn't keep up a friendship because after our Concordia Club days, Ed went his way and I went my way. But we saw each other at a cocktail party--

Morris: At the Concordia Club?

Zellerbach: No, after a California-Stanford game. I reviewed Ed's background, and we always had this nice relationship, even though it was not a social or a competitive one.

Then it just became a hard time convincing Ed that he should give 20 percent of his time to the Family Fund and convincing my father that--

Morris: He should start gradually?

Zellerbach: Yes, and so Ed only worked 20 percent, then 30 percent, then 40 percent, then 80 percent.

Morris: That was very ingenious. Did you have in mind that it would be a good thing to start a new executive director out gradually, or is that just how it worked out?

Zellerbach: Well, it certainly was the right way to start, because we hadn't reinvested the funds. We had nothing. So it worked out perfectly, because it allowed Ed to feel comfortable, and my father felt more comfortable with Ed.

Morris: That's an interesting situation, employing somebody who had been working for a governmental agency. Did your father, being a businessman, have some reservations about somebody whose orientation was government service?

Zellerbach: No, no. That never--

Morris: That wasn't a problem. Well, in some sectors--

Zellerbach: Because Ed was on the faculty of the School of Social Welfare.

Morris: But that's still the governmental sector rather than those who "understand about meeting a payroll," is the way I frequently hear it described.

Zellerbach: So I was the peacemaker between Ed and my father; though, of course, with Ed's great capabilities he did very well by himself with my father. I'll have to take credit of orchestrating that though, for getting my father and Ed together.

Morris: Oh, absolutely. Did it take some convincing to get Ed to consider this new departure?

Zellerbach: You bet.

Morris: What do you think made him decide to test out the possibilities?

Zellerbach: Well, Ed and I have always had good chemistry. If you went to college, you made friends, and you probably didn't see your friends for twenty-five, thirty years, but when you see them it's as if it was only yesterday. That's the kind of relationship Ed and I had.

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Morris: Even though you only saw him occasionally?

Zellerbach: Well, that was before, then we started to meet about him coming to work with us. I made representations about what would happen, and Ed had the faith that I could deliver. That had to be one of his compelling reasons.

Changes in Giving Policies

Morris: What were you envisioning as how the Family Fund would proceed?

Zellerbach: Exactly the way it came out. I had and still have a very strong feeling that the family had the habit of using the Family Fund as their means of giving money. So we were giving to very special little niches.

After Ed came to us we started out by saying, "Okay, the Family Fund will match half of what you give."

Morris: In other words, if I'm a member of the trustees, then I want to give--

Zellerbach: No, this was the family prior to that time.

Morris: Okay, before there were any trustees.

Zellerbach: My cousin wanted to give something to her high school. She would just come down to her uncle or my father and say--and they would give sizable gifts to all these various personal things. And, of course, my father also was giving sizable gifts to things that he liked.

Morris: So your first policy was if a family member wants to put some money into their old school, the Zellerbach Family Fund would match half of their gift?

Zellerbach: [murmurs assent]

Morris: That must have really been a surprise.

Zellerbach: So that lasted only for a short period of time. Now that's no longer our policy, and I can honestly look you right in the eye and say that anything that I have funded, I have never used Family Fund money.

Morris: Did Mr. Ehrlich, senior and junior, support this idea?

Zellerbach: Junior certainly did, and senior, in the latter part of his life, certainly did. But he would say, "Oh, Bill, don't make it so tough on yourself. Let us give a little bit from the Family Fund too." We still do, a very little bit, but not on all major gifts.

Morris: Had you gotten this idea from the Heald, Hobson report?

Zellerbach: It's just one of my principles.

Morris: Did you get some static from your relatives on this?

Zellerbach: Oh, gosh, I used to think they would stick pins in a little wax model of me. Yes, a lot of static.

Of course, you had your problem of your trustees--again, following the Heald, Hobson recommendations--but even without them, we would have made some changes. There's no sense in having anyone on the Family Fund who is going to be dead weight.

Family Fund Trustees, 1988-1989

Morris: I brought along the Guide to California Foundations so I could ask you about some of the other trustees.

Zellerbach: Okay. Well, why don't I give you this annual report.

Morris: This is '88 and '89, and they're just about the same. Robert Sinton is somebody that I've seen on your board of directors list for quite a while.

Zellerbach: Bob Sinton is about five years older than I am. He would be a classic person who supports Israel. He's one of the most magnificent men you would ever meet, probably knows more of the Jewish history, of the families of San Francisco, than any person. Just is an exquisite person. He called me up and said, "Bill, you should be giving more to the United Way."

Morris: Did he?

Zellerbach: Just the other day. I'll do it, because I have that much respect for him.

Morris: Now, how had you and he gotten acquainted? Did he come on the trustees through your suggestion, or does he have connections to your dad?

Zellerbach: Well, we needed a replacement for a man that my father had on the board by the name of Stanley Dollar, who passed away from a cancer at a young age, in his early sixties. We needed a replacement for him. So Dad and I went over the list. My father was president of the Newhouse Foundation. Bob Sinton

was on that, and he had known Bob Sinton. Bob Sinton had gone with my sister, Rollie, and her group, when she was growing up, and he just was family. He was just a superb, superb human being. So that is how he got on our board.

Morris: And has stayed with it.

Zellerbach: Stayed and been just a tremendous help.

Morris: And Louis Saroni?

Zellerbach: He is my cousin, my first cousin. We needed another member of the family on the board, so Louis Saroni has been our--

Morris: From the cousin branch of the--

Zellerbach: That branch of the family. He was the eldest son of my father's sister.

Morris: He's also listed as treasurer?

Zellerbach: [murmurs assent]

Morris: You mentioned a little while ago that at one point you had to reinvest the assets. Was that when your father died?

Zellerbach: No, this is on going. We're doing it now, and I'll tell you why we're doing it a little bit later.

[Tape interruption]

Morris: And then we've got [counting] two, four, six, seven, eight, nine ten people now, plus Ed Nathan. Was the board ten people in the early days?

Zellerbach: No, this is really Ed's and my development of the representative board. If you go down the list, I'll tell you exactly why each one was put on it.

Morris: It looks like a very interesting collection. We've got Stewart Adams, in alphabetical order.

Zellerbach: Stewart Adams worked for me in the Crown Zellerbach Corporation. I considered him the heir apparent when I would retire. Stewart Adams--I can still see the lunch we were having--told me, "I'm going into the ministry." He became a minister at the Presbyterian church, the largest one in Menlo Park. So when he decided that's what he was going to do, I thought he would make an excellent addition to our board.

- Morris: That's an interesting change. How old was he when he went from business to the ministry?
- Zellerbach: I would say he did it when he was about thirty-eight years of age.
- Morris: Did he talk to you about what his motivation was?
- Zellerbach: No. Well, obviously it was something that he felt very strongly about.
- Morris: This was before the company was dismantled?
- Zellerbach: Oh, way, way before. A good ten years.
- Morris: So that means you got some good, solid Presbyterian input. Did you have some debates about the Christian and the Jewish viewpoints on charitable giving?
- Zellerbach: Oh, no. We've never had any debates.

Board Changes and Discussions

- Morris: [returning to list] And Zachary Coney?
- Zellerbach: He's no longer on the board. He was Louis Saroni's nephew. In his place, I put my daughter, Nancy, who is an attorney and has really made quite a record with Children's Garden and with the Junior League. Zach Coney is trying to make his fortune in business and just didn't have the time.
- Morris: The Junior League is remarkably thorough training, but I've been told that at one time they didn't accept Jewish women for membership.
- Zellerbach: Yes, it's quite different than what it was thirty years ago.
- Morris: Right, and they certainly don't let the young ladies sit around and play cards.
- Zellerbach: That is true. She earned her spurs with her background at Children's Garden and with the Junior League. All through her life, she has had the belief, as my son John does, who's on the board--they have the same belief that I do, that you've got to participate.

Morris: Is this something that they learned by osmosis, or did you take some time on your boat trips to talk with them about your social concerns?

Zellerbach: Oh, this is osmosis. It's from my father. It's a feeling of pride in the family. It's just an evolutionary process.

Morris: When you said that Zachary Coney was no longer on the board, did you come up with a policy for terms of office or things like that?

Zellerbach: No, I rejected that. Bob Sinton was very much for that, but I rejected it.

As we go through the profile of these people, I am reminded that it can be very, very difficult to get our board talking to one another, too. You put a new member on that board every year, and you are not going to get a cohesive board or a board that will talk openly, where their chemistry is right. I said, "When I feel someone is not going to contribute, I will have the guts to ask them to leave the board."

[Tape interruption]

Morris: What devices have you come up with over the years to get the board talking and encourage them to express their opinions, if there is any serious difference of opinion?

Zellerbach: Well, I've always felt that I've had a knack of leading meetings, and, certainly, working for a large corporation, you get a lot of training in how to run meetings. I think I'm sensitive enough so that you don't dominate the board, and you know specifically who's interested in what and who has the knowledge of what, and you just pass it around. The board, I think, has confidence in me that you don't predecide anything.

Morris: But do you ask different people to speak to a subject that you know they're interested in?

Zellerbach: Yes, on any project.

Morris: In talking with Ed and others on the board about possible new people for the board, are you looking for skills in different areas or experience in different subjects?

Zellerbach: Well, why don't you go over the list?

- Morris: Okay. Now we come to Jeanette [M.] Dunckel.
- Zellerbach: All right. Jeanette Dunckel¹ is very, very knowledgeable on this whole foster care issue. Her husband worked for me, Peter Dunckel, and her father was onetime president of Safeway [Stores]. But here is a woman who came up and could be the one playing cards. She's made a full career of being in the family and children field.
- Morris: So she converted from lady of leisure to--
- Zellerbach: I'm not saying she ever was a lady of leisure. I said she could have followed that.
- Morris: Did she go the Junior League route?
- Zellerbach: I haven't the slightest idea. But I just knew that she was so knowledgeable.
- Morris: And she has the time that you feel is needed to stay with the decisions.
- We've talked about Mr. Ehrlich, Jr., and then we've got Lucy Ann Geiselman.
- Zellerbach: Lucy Ann came on our board when she was a dean at UC San Francisco. We needed a woman at that time. She had excellent background and fit in very well.
- Morris: At that time, there weren't any women on the board?
- Zellerbach: There were no women.
- Morris: And you were kind of keeping an eye out for the need for--
- Zellerbach: If you recall, at that time, there was a tremendous pressure to have women on your board.
- Morris: And is she one of the original board members, going back to your father's time?
- Zellerbach: No, she would be after my father's death.

¹Ms. Dunckel is both a trustee of the Zellerbach Family Fund and a member of ZFF's Child Welfare Advisory Committee. In addition, she chairs the State of California Foster Care/Adoption Policy Board.

- Morris: So she would have come on, what, in the late seventies?
- Zellerbach: About the same times Stew Adams came on. In fact, the two came on at the same time.
- Morris: And George B. James?
- Zellerbach: George is a recent addition. George is the chief financial officer at Levi Strauss [Company]. He was the chief financial officer at Crown Zellerbach. He's a man in his early fifties. We needed someone. Oh, he's a tremendous person. His wife is a tremendous person. He is head of the ballet, took the ballet through all that horrible thing when they had the big shake-up in their staff and the dancers.
- We needed a person that was very, very skilled in the financial world to help us manage our portfolio plus all the skills in the--if you run the ballet, you know exactly what's going on in the symphony, the opera, the museums. His office was next to mine, and I watched him go through all that.
- Morris: Yes, managing that kind of an organizational upheaval must have taken a lot of overtime. Does he have actual decision-making responsibilities regarding the fund's finances?
- Zellerbach: No, he doesn't, because he doesn't have the time. But he gets a copy of everything that we do. We don't really make any change without my talking with George, putting his input in it. But he doesn't have the time to take the hours it takes to review the portfolios and do that kind of thing. But he's vital in the business community. You need someone that is vital in the business community.
- Morris: And then Verneice [D.] Thompson?
- Zellerbach: Verneice Thompson is one of the most superb directors. She specializes in communications. She gives seminars for a lot of the large corporations, individual seminars on how to lead meetings, how to get people talking together. Of course, she is very knowledgeable of all the social needs. Verneice is also an African American.
- Morris: So was there some preliminary discussion in the trustee group as to--

Zellerbach: What we would do with all new directors, at least 60 or 70 percent of them, we would have lunch with them or interview with them.

Morris: Before they're invited to come on the board?

Zellerbach: Before they're invited to come on the board.

Morris: Was there any discussion before that about, it was time to have a minority person on the board of trustees?

Zellerbach: No, because Ed and I were working in that direction. If you take a look at the composition--

Morris: It was kind of by consensus, that, "It's time that we--"

Zellerbach: Verneice, whether she was white, black, or purple, is one of the most valuable trustees. That's about the best way I can put it.

Morris: Had you had some contacts with her before, maybe, on some of the projects that you had been working on?

Zellerbach: No, Ed came up with her name.

Morris: Have you and she had some conversations on this subject of getting people on the board to talk and interact?

Zellerbach: No, but she'll call me up and, many times, say, "Bill, that was one of the best meetings I've ever been to. You're doing a superb job." So it builds my ego.

Morris: Does she ever call and say, "Maybe we need to talk about this." I need to ask both sides of this question.

Zellerbach: You bet.

Morris: Are they things that you hadn't thought about?

Zellerbach: Oh, sure. They're all upgrades.

Morris: That's a good way to look at it.

The Next Generation of Zellerbachs

- Morris: And then we have John W. Zellerbach. That would be your eldest son?
- Zellerbach: That's my eldest son. John earned his spurs by taking the Hospitality House from nothing and building it up to a very vibrant, ongoing project. His wife is very dedicated and feels the same way that John does. So it was time, about three or four years ago, to start getting ready for the change of the guard.
- Morris: You said, "earned his spurs." Was that as a board member or was he actually on their staff?
- Zellerbach: No, he just came on their board of directors when it was nothing and put together the board of directors and put together their latest budget and all their fundraising drives.
- Morris: Had you suggested or encouraged him to get his feet wet in community activities?
- Zellerbach: No, not at all.
- Morris: Really? Because a lot of younger people nowadays have difficulty finding the time to put into volunteering.
- Zellerbach: Well, part of his discipline--he's a very disciplined person. X percent of his time is going to be put to this.
- Morris: Oh, really? He has this sense--both he and his wife, am I right?--that they want to put a certain percentage of their time back into the community?
- Zellerbach: [murmurs assent]
- Morris: Was it a matter of choosing one of your children, or was it a matter of, it's the job of the elder son to take on this responsibility?
- Zellerbach: No. John earned that. Of my four children, he earned the first shot at it. Nancy is my youngest, and she earned the second shot.
- Morris: Is your thought, or hope, that eventually all four of the kids will come on the board?

Zellerbach: I hope so. My second son, I'm sure, will end up on the board because he, up to two years ago, was working in the mental-health sector. He graduated from college, but he never went on to get a master's degree in sociology or whatever you need. He did run La Posada, which was a halfway house for people that were not sick enough to go to the general hospital, but sick enough to need residential treatment.

Morris: Is that in the Chicano community, La Posada?

Zellerbach: Yes, La Posada, and there were about five of these. Eventually, he became the program director. I always told Tom, as I told all my children, "Any time you want to go on with your education, I will support you." Lo and behold, Tom is in his second year of law school at the University of Pennsylvania and is in the upper third of his class. It's like having a son come home. I have never been so delighted in all my life.

Morris: You were worried about him for a while.

Zellerbach: Oh, yes. Always tremendous communications between us, but he was living on \$25,000 a year.

Morris: Why did he pick the law rather than medicine or social welfare?

Zellerbach: Well, he can analyze things in a way that's amazing, look at every color and shade of a question. He just had to come to that decision himself.

Morris: Right, but you think it's an interest in the intricacies of how an idea's put together rather than--you know, some people nowadays go to law school because they're interested in changing social policy.

Zellerbach: No, no, no. He went because he said, "Dad, I want to live better." He's coming out this summer, and he's going to work for the Orrick [Herrington and Sutcliffe] office for the summer, and he will earn twice as much money in the summer as he ever earned--

Morris: A full year slaving away for La Posada. That's an interesting comment on the way our society is structured, isn't it? Well, with Judge [William] Orrick's office, he'll get some experience in community considerations, too, won't he?

Zellerbach: Oh, yes. I mean, he is--talk about smart, and empathy! He could have been a rabbi, he's got so much empathy. He's not religious, but--

Morris: Well, I have Jewish friends who have said that being a good Hebrew scholar is great preparation for the law. You already know about dealing with the intricacies of--

Zellerbach: Tom is not religious and knows nothing, really, about Judaism. They all were bar mitzvahed and confirmed, but that's as far as I could take them.

Community Support for the Arts: Chamber of Commerce and Hotel Tax Fund

Morris: I see you looking at your watch. Do you have a lunch date?

Zellerbach: At 11:35 I'm going to the St. Francis Hotel because they are honoring Leonard Kingsley, who is the top man on the symphony board, as the Businessman in the Arts. So I'm going down when he gets his presentation.

Morris: Is that how the celebration is billed?

Zellerbach: Yes, I think that's what it is. [reading invitation] "Business Arts Award Luncheon of the [San Francisco] Chamber of Commerce." Leonard Kingsley is a superb person.

Morris: Oh, this is a chamber of commerce event. The chamber of commerce is encouraging people to become involved in the arts?

Zellerbach: Every year they have a Business Arts Award, and evidently Leonard is going to get the principal award.

Morris: Am I right in thinking that the chamber of commerce has not always been particularly interested in the arts? Is that something that has developed in your experience in recent years?

Zellerbach: Oh, the chamber of commerce hasn't been vital in much of anything.

Morris: Is that a lack? You know, you've got SPUR [San Francisco Planning and Urban Renewal Association], and you've got people like yourself taking an interest in downtown matters.

Zellerbach: I was on the chamber of commerce board.

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Morris: When would you have been on the chamber board?

Zellerbach: Probably fifteen years ago, twenty years ago.

Morris: Is there some way that they could be more--

Zellerbach: Again, they're in the process of getting a new paid director. And, yes, you know, any of these organizations can do exactly what the protoplasm drives them to do, but you don't see San Francisco being led by our chamber of commerce. Our chamber of commerce has no one that they can call their own on the supervisors. That's as low as you can get for a chamber of commerce. [laughter]

Morris: Is that because the chamber has not tried to find and support candidates for local office?

Zellerbach: Oh, they've tried, but it really shows a lack of leadership as we started out talking about today.

Morris: Yes, that sounds as if it goes back to the question of why there was a need for the Blyth-Zellerbach Committee forty years ago.

Zellerbach: Because they probably had no one on the board of supervisors.

Morris: You know, Charlie Blyth certainly had a lot of experience as a fundraiser for the Republican party, as well as in the brokerage business. One wonders why he worked through this committee that he and your father helped put together rather than through the chamber of commerce?

Zellerbach: Because the chamber of commerce, I suspect--and I don't know--was ineffective.

Morris: I guess I have a question about proliferation of organizations. How many organizations does a community need before they start getting in each other's way?

Zellerbach: I can't answer that, because I'm really not that interested in SPUR, and I've lost my contacts in the chamber of commerce.

Morris: You didn't stay with the chamber very long?

Zellerbach: Well, I stayed. I did my terms, and then they elected someone else to the board.

Morris: Particularly, since the Zellerbach Family Fund has been so interested in the field of the arts, in the time that you've been leading it, have you been aware of a general increase in interest in and support for the arts?

Zellerbach: Well, yes, because the city hotel tax just pours a tremendous amount of money into the arts. In general, I think they've done an excellent job.

Morris: Have you been tapped to assist on that, to serve on that committee or talk to the mayor about it?

Zellerbach: Well, Ed Nathan, I know, has had his hand in that. Under [Mayor Art] Agnos, I don't know whether Ed is any longer a member.

Morris: Really? There's that much difference between how one mayor looks at that fund and another?

Zellerbach: No. Agnos was a man who, "Out with the old, and in with mine." Well, we know Agnos, because Agnos was a very welfare-minded assemblyman. So he and Ed knew each other. I'm sure any time Ed picked up the phone and would want to talk to the mayor, the mayor would answer his call.

Asset Management

Morris: Before we get past it, you were going to tell me something about the financial policies of the Family Fund. You said that it was a constant matter of keeping an eye on it. Do you use a professional money manager?

Zellerbach: We use money managers, and we use someone called Cambridge Associates, who will tell you how well your money managers are doing against the universe. We are now going through a time where our money managers have been there long enough. It's time that the younger members of the board participate, seeing if we have the right mix in our portfolio and the right mix of managers.

Morris: You involve the whole board in this and not just a committee which makes a recommendation?

Zellerbach: No, it's a committee that does it.

Morris: And that includes some of the younger members of the board, too?

Zellerbach: [murmurs assent]

Morris: There was a comparison chart in one of the foundation's annual reports that looked to me like the fund's assets have done very well, that they almost doubled in a ten-year period.

Zellerbach: We have just about kept up with the inflation index, which is good.

Morris: [reading report] Let's see. In 1973, the assets were sixteen million. In 1987, they were thirty million.

Zellerbach: In what year?

Morris: '87.

Zellerbach: Well, now they're about forty.

Morris: So the stock market upheaval a couple years ago didn't affect you much, if anything?

Zellerbach: Well, it put us back one year.

Morris: That sounds like you've done very well.

Zellerbach: Oh, we have done well.

III GRANTMAKING PROGRAM DEVELOPMENTS

Community Arts Distribution Committee

Morris: The other thing I wanted to ask you about today: Ed Nathan gave me a copy of this absolutely marvelous--

Zellerbach: Isn't it, though?

Morris: [chuckles]--board organizational chart. [See next page] I'm going to include it with your interview, because I'm really impressed at such a--[knock at door]

[Tape interruption]

We were talking about this marvelous organization chart that you've created. The Community Arts Distribution Committee, am I right, was the first auxiliary grantmaking group that you put together within the Family Fund? How did that come about?

Zellerbach: I think Ed and I did it together. I think my father was still alive when we did it. It was the most novel thing. My father was very interested in the neighborhood arts. He got interested in neighborhood arts because, when the initial bond issue for a new symphony hall failed, they did a public relations survey--opinion polls, they call them today--and they found that the people just weren't supporting the arts. They felt that the only support went to the major institutions, and no one was doing anything in the neighborhoods.

Morris: And that the major institutions were elitist. Was it that kind of thing?

Zellerbach: Yes, so Dad felt, in order to ever get a bond issue through, we would have to start supporting the neighborhood arts. The Family Fund put money into the neighborhood arts.

Morris: Yes, I find that back as early as about 1973.

Zellerbach: Then he recognized that there was no way you were going to get a bond issue, but by then he was hooked on the neighborhood arts and just felt this was a tremendous thing to be able to do. The whole board was hooked on that too, because it is a tremendous thing to do. Instead of just continuing to fund these neighborhood arts centers, because they started to go by the wayside, we started to give to the individual splinter groups that needed small funding.

Well, there was no way that our board would know anything about these groups or could spend the time or effort on finding out, so Ed and I came up with the thought of putting together a group of artists and giving them x amount of money and letting them have carte blanche, to decide how to give them the money.

Morris: I gather that Ed did some talking with Stephen Goldstine, who was the head of the city Neighborhood Arts Program about this idea.¹ Was Mr. Goldstine somebody your father had--

Zellerbach: Well, because Dad was on the [San Francisco] Art Commission and head of the art commission for twenty-five or thirty years.

Morris: Right, and I wondered how closely he kept an eye on the Neighborhood Arts Program when it started.

Zellerbach: No, Goldstine never had anything to do with it.

Morris: With the Neighborhood Arts Program?

Zellerbach: No, with our program.

Morris: I see. Mr. Goldstine recalls that he and Ed did talk about the possibility of the Zellerbach Family Fund putting together its own--

Zellerbach: That could be. You would get that from Ed. I'm not aware of it.

Morris: Yes, I just wondered if the Community Arts Distribution Committee would meet here and you would sit in with them.

¹See interview with Goldstine in San Francisco Neighborhood Arts Program, Regional Oral History Office, University of California, Berkeley, 1978.

Zellerbach: Well, how that group worked was they met by themselves. Ed would be there, but he never cast a vote. During the early days of the group, why, about twice a year the trustees would meet with them and ask questions and just go back and forth. That's now gotten to about a once a year occasion.

Morris: Generally, did Family Fund trustees and the arts distribution committee see eye to eye, or did they have different views?

Zellerbach: There was a little meshing that had to go along. There was one early application that was so far out and so much against the mainstream that we just felt we had to turn it down.

Morris: Individual or organization the community arts committee wanted to fund?

Zellerbach: Small little film on--it had to be during the latter part of Vietnam. We got over it very well, made a beautiful compromise.

Morris: There's a general thought that often the small arts groups are interested in rather new and controversial political ideas. Is that anything that gave the trustees some concern?

Zellerbach: No, because this group is now so into this. They've been working so long together. If you go through the list, they support an awful lot of causes.

Morris: Yes, yes. It's amazing how many arts groups there are in the Bay Area.

Zellerbach: A lot of causes they have represented in their activities.

Morris: Part of what they're about, as I understand it, is greater access to art for different groups of people, both as performers and audience and spectators.

Zellerbach: And for the ethnic community.

Morris: Yes. Do the political aspects cause any concern amongst the Family Fund's trustees?

Zellerbach: I can not recall any concern in the last five, six, seven years. But, again, it's a melding thing and these annual meetings with the arts committee puts everything on the table.

Morris: Do you have a chance to go to some of the art exhibits or performance?

Zellerbach: Oh, I try to go to at least one or two a year.

Morris: Any in particular?

Zellerbach: No.

Morris: Is this over and above--are you and Mrs. Zellerbach regular attenders of the symphony and things like that?

Zellerbach: We go to the symphony on a fairly regular basis.

Morris: So you get some exposure to the range of things going on in the city.

Zellerbach: But I can't consider myself an expert.[laughter]

Emergency Loan Fund

Morris: [checks notes] Let's see. One of the other things that the foundation got into early on was the Emergency Loan Fund, also back in 1973. Was that an early cooperative funding kind of a project with other foundations?

Zellerbach: Well, this was at the time when, I guess, [Ronald] Reagan came in and cut off so much. This was a collaborative effort for which Ed was one of the principal stemwinders. We supported that very heavily.

Morris: How did the board discussion go about working together with other foundations?

Zellerbach: No, there's no problem on that. No problem.

Morris: Some people like to do it all themselves and have their own--

Zellerbach: We like to collaborate just as much as we can.

Morris: Is that something that you had been interested in, or is that an idea that Ed has developed?

Zellerbach: That collaboration, again, is an evolutionary kind of a thing. We started on the premise we weren't going for bricks and mortar. We weren't going just to have our name in print. So

that is not your stemwinder. You don't really care who gets credit for it as long as it is accomplished. I've never had a dinner given for me or an award given for me or anything like that, because I wouldn't do it.

Morris: Well, it's nice to get a little glow of sunshine from all the work you've put in on these things. You don't feel that way?

Zellerbach: I don't feel that way.

Keeping Up With the Foundation

Morris: How much time about do you spend on keeping track of all these activities that the foundation has going?

Zellerbach: I've never really put a measure to it, but I suspect it's a good 25 percent of my time. It is not in the administration of the programs.

Morris: How does it get used, then?

Zellerbach: Mostly in the financial side.

Morris: That's important, certainly.

Zellerbach: Yes, but there is nothing financially that is done that Ed is not part of.

Morris: So he puts a good percentage of his time, too, on--

Zellerbach: Not as much as he would have to do if I wasn't there. Ed and I have lunch, I would say, twice a month. That's where we really do our business.

Morris: Of what he sees coming in?

Zellerbach: And what's going on, where we give our money, and the whole policy. It's not every other Thursday. It's whenever. I make a very, very great effort to not go into the Family Fund, even though their office is next door, so that they have no threat that anyone's looking over their shoulder.

Morris: But you do have a chance to keep up on how things are going with these programs the Family Fund has developed?

Zellerbach: Well, this is part of what the trustees feel that we should be doing.

Morris: Well, with the range of things going on, it would be very easy just to see the list of materials presented for decision at a board meeting and then have half of a board meeting occasionally for how things are going in the grants that have previously been made.

Zellerbach: Many of the major things--myself, and anyone who wants to come with me, or anyone by themselves, will go and actually visit.

Morris: In process or before the grant's made?

Zellerbach: In process.

Morris: Like on the arts projects usually?

Zellerbach: Oh, I've done some on the arts. One that we did with Paul Guillory over in East Oakland, I spent a day on that.¹

Morris: That takes a lot of time.

Zellerbach: It's fun time.

Morris: Talking to the people who are actually doing the project. What were Mr. Guillory's concerns?

Zellerbach: Now we're on an entirely new subject. That's East Oakland and the black community, the black male.

Morris: Do you see some positive signs in what's happening?

Zellerbach: It's one of the saddest things, because when Wally Haas and I started the Hunters Point Boys Club, I made such a great effort to get black people to come on the board, black men, and failed. Worked with them. You go back into an organization today, and you're no further along than you were.

Morris: Does that have anything to do with the kinds of programs that have been suggested and put in place? If the economy or the political system had--

Zellerbach: No, it's a complex matter. It has to do with education, opportunity, poverty, and not much hope for the future.

¹Family Enrichment Network Project.

Morris: Are some of the foundation's family support programs geared to this kind of concern?

Zellerbach: Oh, yes. We still do it. We still try, but you ask, "Have they really come a long way?" During this whole period, you've watched the women, who were a minority when we started this, come along; you've watched the refugees from the Orient come in.

Morris: I see that you had a program in immigration law that also goes back to 1973. Do you remember how that came to the foundation?

Zellerbach: I suspect it came to the foundation because there was a need for the immigrants to have this professional advice. I think we were trying to get the lawyers to do *pro bono* work on it. I think it probably evolved through that process.

Morris: Would you have been involved in chatting with some of your friends in the legal profession about--?

Zellerbach: No. They had their own--

Morris: The legal profession had their own--

Zellerbach: --little section which we encouraged. But our whole thrust, really, was not to get the legal profession into this but because here was a great need.

Morris: I wondered if you'd recall if this was related to the discussions that then led to some changes in federal immigration law.

Zellerbach: No, I'm sure not. This was purely local need.

Morris: Why don't we stop there for today.

I am hoping that you will be patient for another session, because I would like to talk with you about the early intervention-mental health work that the Family Fund has been providing funding for twenty years now.

Zellerbach: Okay, but I'm going to be going away for three weeks.

Morris: That's all right. Let's see when we can meet early in June.

Zellerbach: Oh, sure.

Youthful University and Business Experience in the East

[Interview 3: June 22, 1990]###

Zellerbach: There's a big difference between the East Coast and the West Coast.

Morris: Yes. How did you feel about going to college on the East Coast?

Zellerbach: Well, I hadn't turned eighteen when my folks put me on the Overland Limited; I went back to the University of Pennsylvania.

Morris: All by yourself on that train?

Zellerbach: All by myself.

Morris: Was that your first trip back East?

Zellerbach: That was a culture shock. And they kept asking me, where did I come from? I would say San Francisco, and they would always ask me why, and I got tired of it, so the next time someone said, "Where do you come from?" I said, "Oh, I come from out West." They said, "Oh, Pittsburgh?" [laughter] I'll never forget that. They have a world of their own, too.

Morris: That's true. Were there many people from the Bay Area at Penn when you went there?

Zellerbach: No, I was all by myself.

Morris: That must have taken a little getting used to.

Zellerbach: Well, the first year I hated it. The second year I tolerated it. The third year I liked it. And the fourth year I would have lived there.

Morris: Really? Did you consider at all taking part of the family business east?

Zellerbach: Oh, no, no. I had an opportunity to do that, because we had a business in the east. It was not doing well, and they asked me to go back--I couldn't have been more than twenty-eight, twenty-nine--and take a look at it. I came back and said, "You either get a new manager or sell it." They said--

Morris: This was your father?

Zellerbach: No, this was the board of directors at Crown. They said, "Well, will you go back and run it?" I said no. So I went back and sold it. It took me six months to sell it.

There were five locations. I had to sell each individual location to a different buyer.

Morris: That was quite an undertaking for a young fellow.

Zellerbach: Oh, yes. You couldn't communicate well. Your telephones were--well, I guess they were dial by then. When I went back to college in '37, they weren't.

Morris: Did you have to scare up potential clients, or could you work through a broker or something like that?

Zellerbach: No, no. These were distribution businesses. I did it myself. It was very interesting.

Shared Authority: Responsibility for the Arts

Morris: Well, I have a number of questions that I've been saving up, some since I have talked with a couple of people on some of the Family Fund's advisory boards¹. I wondered if the trustees of the foundation had some concerns about sharing their authority in making decisions about grants with the people from the Community Arts Distribution Committee.

Zellerbach: None whatsoever, and there's good reason.

[Pause]

Take a look at our list of grants. If our directors were that interested in these little grants, they wouldn't be very good directors. Look at this.² [shows document] You start here, turn the page--

¹See Chapters XIV and XV.

²Annual Report, Zellerbach Family Fund, 1989.

- Morris: Right, and I see grants listed for \$2000 and \$1500. A few for \$7500.
- Zellerbach: The board reviews them after the fact. I mean, the Community Arts Distribution Committee approves the grants and then the list is sent to the board. The board will approve the committee's decisions, but if they have any questions, they'll bring it up. In other words, if they say, "Why did you give to--" Or maybe raise a question if this is or that project is somewhat political. That's happened maybe two or three times in ten years.
- Morris: That was one of my other questions. I've been told that a lot of community arts groups do have a strong social and political viewpoint.
- Zellerbach: Very much so.
- Morris: Is that something that the trustees have talked about?
- Zellerbach: We did in the beginning. But the distribution group has been in place long enough now, though we replace one person about every three or four years--we're in pretty good sync. They know that there's just good sync, so we really haven't had a problem.
- Morris: Well, I wondered if sometimes people felt that some of the arts groups had different political ideas than an individual trustee might.
- Zellerbach: We recognize that. And also that's one of the reasons we do the program. We want the arts grants to go to diverse groups.
- Morris: Do you ever get any complaints from some of the larger arts organizations?
- Zellerbach: No, because we give the major arts \$10,000 each a year now. They don't have to solicit it; they don't have to do anything. That's the symphony, the opera, the museum [Fine Arts Museums of San Francisco], and the ballet at this point.
- Morris: That's just sort of built into the Family Fund grant budget, that there will be these operating support grants?
- Zellerbach: And I think about fifteen years ago the amount we gave each of them was \$5000, and so every three, four years we raise it without a big fuss about it.

Morris: As a matter of your sense of social responsibility to those organizations?

Zellerbach: Well, we have a sense of social responsibility to the community. We look at the foundation as being almost like a business in San Francisco. So we support the United Way. We support the major arts as being part of a corporate citizen.

Financial Guidelines and Reviews

Morris: Do you give a lot of attention to the foundation's assets so that they continue to grow?

Zellerbach: Oh, very much so, yes. I suspect, of the time I spend in this office, about 40 percent of my time is on the assets. All our assets are managed by professional advisors.

Morris: Is that a recent development? You've always used professional--

Zellerbach: No. When we reorganized--I told you how wonderful my father was, coming up with the Heald, Hobson report. All the assets were Crown Zellerbach stock, and he wanted that Crown Zellerbach block so that his influence could be felt. So it took us about ten years to finally work our way out of the Crown Zellerbach stock. But everything is in the hands of professionals.

Morris: Was the divestment of the Crown stock was done by a financial management firm?

Zellerbach: Yes.

Morris: Some foundations have had some trouble making that break from the company which the assets come from.

Zellerbach: It was very difficult for my father--very difficult.

Morris: It sounds like the change was made before the tax laws were revised kind of requiring it. About 1969, there was the--

Zellerbach: Oh, it was done way before that.

Morris: Yes. Do you or did your father pay much attention to the rules and regulations concerning foundations?

Zellerbach: Oh, very much, because we've always had attorneys on our board. Through the *pro bono* technique, why, the attorney that we have on there is charged with watching it.

Morris: Right. Does he occasionally do a session for the board on, "This is what the rules and regulations are," or, "There have been some changes in foundation guidelines"?

Zellerbach: Well, we're also audited. This is by certified public accountants. It's their responsibility, also, to point out--

Morris: To keep an eye on things.

Zellerbach: To see that, you know, to see that we're following any changes or the right percentage of grants, keeping the record. If anything, I suspect our fund overplays separating everything.

Morris: Do you have a percentage of the funds available that the trustees feel should go to the education programs and to the different kinds of programs the foundation runs?

Zellerbach: Well, we, about every two years, have a formal review. I've never enjoyed seminars. I've never enjoyed saying, "Let's all go to Silverado and--" So Ed Nathan and myself and usually one other member of our board will do a lot of preliminary work in breaking out how we were spending the money twenty years ago, and ten years ago, and five years ago, and what the directions are. And we will spend maybe two hours of intense discussion going over our directions with the board. Then it's up to Ed Nathan to follow that.

Morris: So that the actual decision-making part is relatively short.

Zellerbach: I don't think we ever go into a meeting and say, "Okay, this will give us 30 percent in education, and we only wanted 20 percent." We don't do it that way. We pick our fields, and then we'll review back to see the extent to which we're going in those directions. Of course, if we were going 100 percent education, we would stop it right away, but you don't.

Morris: But when you look at the overall granting, although there's a lot that goes--

Zellerbach: You know, everything sort of falls into one or another of the general groups on that organization chart.

Morris: Right, but in 1989, a lot more money went into the child welfare [\$509,373] and early intervention and support services [\$219,000], for instance, than went into the education

projects [\$178,000]. I was thinking about that kind of variation in program size.

Project Evolution: Education

Zellerbach: In education, we really are only in one part of education, and that's because of Kate Farrell, who seems to be a genius in creating curriculum. She did the first curriculum project we funded. She came to us with, oh, what was it, word-weaving--telling children's stories.¹ Then she progressed into other areas and now is working in the area of a curriculum for preschool.

And I think Lynn Landor did the Children's Own Stories,² which developed into an exceedingly good project. It's one that I was very skeptical about, but it turned out just beautifully. When I say I'm skeptical, I'm not an expert on that. It just didn't sound as if it was going to work, but it worked.

Morris: That children could tell their own stories--

Zellerbach: It started by their telling their own stories, and the teacher on a typewriter would type out what the children were expressing. It just evolved into a very good program that was taken up by many, many, many school districts. So I think as far as education is concerned, it depends--if we have the talent, we would invest in that talent.

Morris: That's an example which, again, I see happening in a number of program areas, that you keep funding the same person or the same project. Some of these funding relationships have gone on for seven, or eight, or ten years.

Zellerbach: Well, we funded the--oh, what's her name--in the group, you know, the circles. What's the buzzword for the circles?

Morris: Are we still in education?

¹The project has published a language arts curriculum guide, Children's Own Stories, Lynn Landor, SFSC, P.O. Box 5646, San Francisco 94101.

²Curriculum guide and videotape, published in 1989.

Zellerbach: Let me pick it out for you. [looks over organization chart.]

Debby Lee. Support group. You know what I mean by "support group"? Now that has been well-entrenched, and we are giving Debby about six months of almost like a sabbatical for her to go out and find other areas where she can be creative. We have not made any commitment that we would fund whatever she comes up with, but we felt an obligation to Debby Lee, who had created these various support groups, to give her that transition period.

Morris: Because she feels like it's time to explore some new areas in her work?

Zellerbach: Yes. We wouldn't support it any more, because a support group now is--those techniques are established, and she's looking for other things. We felt that we should give her this kind of time, like a sabbatical, to go out and--

Morris: Explore from her own experience what else is out there.

Broadening Staff Horizons

Morris: Was that the kind of thinking when you set up a study sabbatical for Ed Nathan back in '79?

Zellerbach: That was Ed's own desire. Ed and I talked about it again no more than a month or two ago. I said, "You're only taking three weeks' vacation. You should be out of the office more." He doesn't want that. I think that's a function of age.

Morris: How so?

Zellerbach: Well, Ed's seventy-one. He's in the midst of all these creative things, and he just doesn't want to let go.

Morris: That's an interesting thought, but ten years ago, eleven years ago, in '79, he was relatively recently part of the foundation. Why was it an appropriate thing then?

Zellerbach: Because we really didn't have as established a program as we have today. He wanted to think and broaden his horizons. I thought it was a grand thing to do.

- Morris: That's very understanding of you. Sabbaticals are hard come by in the academic world.
- Zellerbach: But how important if you're--you see, our whole thought process is, we want to be on the cutting edge of giving. How can you be on the cutting edge of giving if you're sitting in our office?
- Morris: Well, but the other understanding about the foundation world is that you get about ten times as many applications coming in, through the mail and the telephone and friends and strangers buttonholing you at luncheons and everywhere else with all these marvelous ideas about improving the community--ten times as many as you can fund.
- Zellerbach: Again, Gabrielle, I told you that all requests go through Ed. I don't think anyone has sent me a personal request in--I mean, *quid pro quo* or--I would almost say, like, ten years, because I've always shut them off. None of my friends, none of the business associates, no one.
- Morris: What about the requests that come to the foundation, that come through the staff screening process--those aren't enough to provide the kind of ideas that the board thinks are valuable?
- Zellerbach: Most of them are--
- Morris: Not that interesting?
- Zellerbach: --are poor. And then Ed and his staff gather all the requests that have come in that they have denied. That is sent to the board members along with a card that says, "I approve of those that you've turned down. I would like to see more information on this, this, this, and this."
- Morris: Oh, that's interesting. Yes, that's kind of a checklist you can--
- Zellerbach: So that every request that goes in is circulated to the board--after the staff has turned it down, but there is the option of opening it up or getting more information. In the last five years, we've provided additional information to board members on about six grant requests. We have not changed any staff recommendations.

Morris: It sounds as if, more and more in recent years, the programs that are being funded have been developed from the contacts that are already working through the various advisory committees.

Zellerbach: That is correct.

Morris: That seems as if like it's producing more satisfactory projects and results.

Academic Interaction

Zellerbach: Then I did something just very recently. The University of Pennsylvania has been something special to my family, and so I recently completed the funding of a chair at the University of Pennsylvania in their liberal arts department. The universities, as you well know, are very independent in who they pick for these chairs. [Gets up and passes letter to interviewer]

Morris: [Chuckles] I thought we were very responsive to the concerns of our constituents.

Zellerbach: The man they chose is a very prolific sociologist.

Morris: Is this the Professor [Frank] Furstenburg [Jr.] you were telling me about?

Zellerbach: Yes. What I am hoping is that this chair will have an interest in some of the things that we are doing in the Family Fund.

Morris: [Reading letter] "Enclosed you will find the materials that you requested. I'm adding articles thinking they might be relevant to the aims of the Zellerbach Family Fund. I'm a great admirer of Judith Wallerstein's work, but I have more mixed feelings about her recent contribution."

Zellerbach: Yes. The dean of social welfare at Cal, Dr. [Harry] Specht, wrote Furstenburg and asked him if he would like to contribute to a consortium that he had put together. So Furstenburg came out for that. I met him then. Whether we can take someone like Furstenburg and start intertwining him into things the Family Fund is interested in-- That letter gives his background. We hope he'll be interested in sharing his work with us.

Morris: I see a lot of population studies.

Zellerbach: He's the most prolific writer I've ever seen.

[Pause]

Morris: This is eleven pages of vita and publications. Impressive. It sounds like a real challenge.

Zellerbach: I can't tell you whether anything can develop, whether someone like him can feed new types of ideas--but, very, very clearly, the Family Fund has not contributed or paid anything for support of this chair. This is all--

Morris: This is your personal benefaction.

Zellerbach: If something like that could marry, or we could gain something, it would just be frosting on the cake. It could lead to absolutely nothing or it could be another great input for us.

Morris: Right. I should think it would be a great opportunity for the Family Fund and for him for a little cross-country exchange of ideas. I see he's also done a lot of work on family issues.

Zellerbach: Well, he was very interested in one project that we did with children and divorce. He didn't waste words that he didn't think the last study of children of divorce was a very good study.

Morris: Really? The research that came out of a project the Family Fund supported?

Zellerbach: Yes. In fact, it was mentioned in one of his publications that he sent out.

If this could develop, it would be fine. If it doesn't develop, that's fine, too. It wasn't given for the reason of augmenting our programs. It was given because the University of Pennsylvania has been very wonderful to our family.

Morris: Your family's been very wonderful to the university.

Zellerbach: Everything is a two-way street.

Morris: How did you happen to decide to fund a chair in the social sciences rather than in business or engineering or something like that?

Zellerbach: I just felt that business, engineering, law--they've got wealthy, wealthy alumni. The School of Arts and Sciences at Pennsylvania is an exceedingly important department, but the way they have set up their curriculum today, with all their highly specialized schools--business, law, engineering, medicine--that school was sort of neglected. Arts and sciences are so very important to make a person whole.

Recollection of Student Days at Wharton Business School

Zellerbach: I don't know if I'm repeating myself, but back in 1938 when I went to the university, I went to the undergraduate Wharton School, which was a business school.

That was really its foremost thing before the war, was its undergraduate program. I really went to a trade school. I think our freshman year we had nineteen hours we had to take, and two hours was in English, and two hours was in maybe some sort of an elective.

It was a plain Jane kind of education. I didn't take any more liberal art courses until I was a senior, and I had maybe four or six credits that I could take in my college career.

##

Morris: I wondered if, given your parents' interest in the arts, as a young fellow growing up were you exposed to the symphony and the opera and such cultural activities?

Zellerbach: This is a terrible thing to say, but I don't know whether my father enjoyed music that much or enjoyed more touching shoulders with the people of San Francisco.

Morris: Oh, knowing the performing artists themselves.

Zellerbach: Yes, being a shaker, so to speak. I never really thought of my father coming home and saying, "They didn't play Beethoven right," or--

Morris: Or, "I didn't like the way that was staged." That's really interesting.

Zellerbach: The fact was that he was very, very interested that he had the finest, but whether he knew it was the finest or not, I don't

think he was trained. And certainly I'm not. I mean, I don't go to the opera. I used to, but now I'll go to the symphony.

Morris: Well, even the most devoted student of the opera or any of the arts--you would think, after a lifetime, you reach a saturation point.

Zellerbach: That's very true.

[Pause]

Investment Issues

Zellerbach: We just now are going through a reappraisal of all our money managers.

Morris: That's a challenging task.

Zellerbach: And then reallocating our assets. We're using a consulting group called Cambridge Associates, who specialize in--let's see if I pronounce it right--eleemoson--

Morris: [chuckles] That's a wonderful word. I've never been sure how to pronounce it either. Eleemosynary--

Zellerbach: That's it.

Morris: I'm not sure that's the way to pronounce it.

Zellerbach: I think that's very, very close.

Morris: They look at things like the social policies of the companies that are invested in?

Zellerbach: Oh, no, no. Heavens, no. This is just financial.

Morris: Whether they make a good profit?

Zellerbach: They help you in judging how much money you should have in equities, how much money you should have in real estate, how much money you should have in global funds, how much money you should have in venture capital, and then they will identify what they consider as good managers--

Morris: Individual or corporate managers through whom you might invest?

Zellerbach: Investment managers, because they invest our money. And then they will measure the performance of our money managers on a quarterly basis.

Morris: Is there some anxiety in terms of managing a foundation's assets, since in recent years there's been so much uproar in the market?

Zellerbach: Oh, no, no. It's just prudent business. Just like you review your giving, you want to review how you have your money invested. That changes, too. Some of your investment managers grow old. Maybe their performance hasn't been good over a cycle. It's just time to take a look.

Morris: Every three months, do you make a change?

Zellerbach: Oh, heavens, no.

Morris: That is too often to be prudent?

Zellerbach: No, no.

Morris: I'm really interested, since in the literature on nonprofits in the voluntary sector, there has been a lot of concern that the University of California, for instance, and others should invest their endowment funds in socially responsible firms. Does that bother your trustees, your financial concern?

Zellerbach: I could cry over things like that.

Morris: Why is that?

Zellerbach: Well, you want to make the proper investments. If you're going to run a race, do you want to tie him down or make a person carry an extra twenty pounds? You want a man to run the best race that he can run--or a person. Because IBM is a \$50 billion company, and they may have \$20 million invested in South Africa, and IBM is a good investment, should we not invest in IBM so we can give more money away for the good of the whole?

Morris: That's exactly what the debate is, I believe: is it more important to influence the policies of South Africa, for example, or the conditions under which underprivileged children grow up in California? How does a trustee make those decisions?

- Zellerbach: Well, we're interested in how the child grows up in California. You know, to say IBM is a socially not-responsible company is wrong. So we don't put any restrictions.
- Morris: Do you have a separate finance committee, or does the--
- Zellerbach: We have a separate finance committee. We're all members of the board.
- Morris: Right, but it sounds like you spend a fair amount of your time with the foundation on those things.
- Zellerbach: Yes. It's very hard to find a director like Ed Nathan, who also has the experience of managing money.
- Morris: Is that important in choosing an executive director--the money management thing, do you think?
- Zellerbach: No, not if you have on your board someone who is willing take the time. Everything I do for the Family Fund--the phone calls, travel--everything is all from my personal account. I'm never reimbursed.

Observations on Foundation Organizations, Family Foundations

- Morris: I was wondering if you have spent much time on some of the trustee committees, of the Northern California Grantmakers, for example, or Council on Foundations.
- Zellerbach: I went through five, six years with the Northern California Grantmakers. They went on to other members. At this moment, no. I'll go to the Council on Foundations if any one of our trustees or any one of our programs are part of their program. Then I'll go to attend that and give moral support, but otherwise I won't go to that.
- Morris: Just to rub shoulders and be part of the--
- Zellerbach: Well, it's almost snooty, but we find that we are so much further advanced in our thinking than most other family foundations, it's very difficult to gain anything. I mean, if we mention we give a quarter of a million dollars away and don't even know who the hell we give it to, they would just about die.

Morris: As in the Community Arts Program?

Zellerbach: Yes. They just can't grasp that kind of a concept, nor are they very interested.

Morris: Really? The idea of seeding the community, as it were, by encouraging so many different kinds of artists through giving them small grants.

Zellerbach: Most of them are all very self-centered, trying to continue what they've done over the previous years.

Morris: Right. You don't have any evangelical urge to explain to your fellow trustees that there's all these other kinds of ways of giving money?

Zellerbach: Well, you do that for a while, and then there's a resentment. They don't want to hear.

Morris: Really? They don't like to hear about the new, improved model.

Zellerbach: No.

Morris: Why is that?

Zellerbach: "It's my money, and I'm going to give it the way I want to give it."

Morris: But on the other hand, people in this country are generally believed to be very eager to have the new, improved model of automobile--or if there's a new kind of elegant house or lovely place to go for dinner or on vacation, people really like that. But they don't like to hear about new ideas in philanthropy?

Zellerbach: Well, most of them are so geared to bricks and mortar, giving to their college--

Morris: Well, you do that, too.

Zellerbach: Not through the foundation.

Morris: No, but you're the same person.

Zellerbach: No, I'm not. What I do with my money is my own business.

Morris: Right, but you're the same person. You're the same Bill Zellerbach who does x, y, and z with his personal funds and is

the president of the Zellerbach Family Fund, which does a, b, c with its grants budget.

Zellerbach: What I do personally takes the pressure off of the Family Fund.

Morris: Yes, so that there are two sides to your interest in philanthropy.

Zellerbach: So I'll give to the symphony endowment fund. I'll give contributions to the Jewish Welfare [Fund], the United Way, and I'll give to the University of Pennsylvania--which the Family Fund has no business giving to.

Morris: Are you suggesting that some people with family foundations use the family foundation as the vehicle for all of their giving?

Zellerbach: Very much so.

Morris: They make the United Way gift through the family foundation and don't bother with the personal gift?

Zellerbach: Very much so.

Morris: I see. If you were going to give advice to somebody just coming into a position on the board of a family foundation, what advice would you give them?

Zellerbach: My advice would be: your family fund is quasi-public because it was created by dollars that normally would have gone to taxes, and therefore you have a broader responsibility. Your fund should be doing work for the good of humanity. You shouldn't hide behind that kind of a shield. Each person should make their own sacrifices.

Morris: Do you feel that philanthropy should have an element of sacrifice in it?

Zellerbach: When I solicited, which I did for years and years for the various units I chaired for the United Way, people would give 1 percent or 2 percent of their salary. Maybe, at those times, they were earning \$10,000. If you give 2 percent, that's two hundred dollars. That's a sacrifice.

When you think of all these campaigns where you involve all your corporate people as United Way does--it's all geared to personal giving. Even your middle executives that earn a fair-sized salary: the boss will come to you and say, "I

expect at least 1 percent or 2 percent," whatever the buzzword is. And they give it. That person may be sending someone to college. It's costing him \$10,000, and he's giving \$1000 to United Way. That's a sacrifice.

Morris: Do you think that's been a problem with that kind of organized work place fundraising?

Zellerbach: No, I think the system works very well. They're beautiful, beautiful giving. It's just wonderful that you take some people who have everything. No.

Morris: Did you do a lot of those United Way work-site fundraising campaigns?

Zellerbach: I've done it all, yes.

Morris: And then did you do a term, also, on the United Way board or United Crusade board somewhere?

Zellerbach: Whatever. They changed the name.

Morris: Regularly, yes.

Zellerbach: There was the Community Chest first.

Morris: Right, and then it was the Federated Fund, and United Crusade, and now it's United Way.

Zellerbach: When I was running this multidivision corporation for Crown Zellerbach, part of the incentive program for the various managers in these divisions was how well they did in their United Way employee campaigns. That was all part of their salary review.

Morris: At that point, was there just the United Crusade, or were there other organizations raising money through in-plant campaigns?

Zellerbach: Oh, as I was going through, there was the war bonds and the E [U.S. Savings] bonds. And then there was a time where we didn't care where they gave the money. We gave awards if the employees were working for their church or any community function of their locality. It could have been in Wenatchee or Yakima. We made that very much a part of the whole job of our managers in those areas.

Morris: That they should be a part of the community as well as hard workers in the company.

Zellerbach: That's right.

Family Philosophy and Children's Experience

Morris: Now, is this idea something that you evolved yourself, or is this something you learned at home as part of your religious training?

Zellerbach: I learned that at home.

Morris: As part of your religious training?

Zellerbach: No, just part of the philosophy.

Morris: Several people that I've talked to have been telling me about the principles of Maimonides. Philanthropy seems to more clearly articulated in the Jewish tradition than in some other religions.

Zellerbach: No, I'm not a very religious Jew. I give money to our temple, and I support it. I support it because I am Jewish, and there should be a temple for all the Jews to go to, but I don't go into the temple very often.

Morris: And you give to the temple because the temple is related to the great variety of Jewish community services?

Zellerbach: No, I'm just not a religious person, that's all. I don't want to say "religious."

Morris: But humane.

Zellerbach: I think I'm very humane. I'm very idealistic.

Morris: I'm just curious as to where the good instincts come from.

Zellerbach: I don't know. I've always had it inside of me. A lot of that has to be training.

Morris: Yes. Formally, or is it training that--

Zellerbach: No, not formally. I've certainly imbued my philosophies in my four children. That was done on a regular basis when they were in their teens. Now they're in their thirties and forties, and they still hear it from me, and I think they follow me. They believe in that.

- Morris: They can hear when Dad's going to make a speech about--
- Zellerbach: No, I don't have to make a speech. They just know that that's--they were raised that way.
- Morris: And they know that you expect it of them, that they take a turn in the foundation or that they do their thing in the community?
- Zellerbach: They wouldn't get to the foundation unless they really showed this character.
- Morris: What kinds of things have your children done in the way of community service?
- Zellerbach: Well, my oldest son really followed everything that I did. He was a principal organizer of the Hospitality House, which worked in the Tenderloin. They were the prime movers in doing something about the homeless.
- Morris: Doesn't Hospitality House go back to the flower children of the 1960s?
- Zellerbach: I don't know. My daughter was a principal officer in Children's Garden over in Marin County. Never would I have thought, when we grew up, that the Junior League would be as strong as they are in charity.
- Morris: That's where she got her training and early experience?
- Zellerbach: There and Children's Garden.
- Morris: Is the Children's Garden originally a project of the Junior League?
- Zellerbach: I don't know. Children's Garden is a place where they bring handicapped children over in Marin County.
- Morris: But I know the Junior League, in spite of its socialite image, has a very strong program.
- Zellerbach: Very strong. Whether she got the Children's Garden through the Junior League, I couldn't tell you.

My second son spent the first part of his career, up to the time when he decided to go to law school, in social work, working for mental health.

Morris: He and Ed Nathan must have shared a lot of insights and understanding.

Zellerbach: Oh, very much so.

My third son [Charles Ralph Zellerbach] has all the instincts, but he has three young children and a powerful job. He has the instincts. His time is more devoted to Little League, and coaching soccer, and the various committees in school. I think Chuck has those qualities also.

St. Ignatius High School vis-a-vis Hunters Point Boys Club

Morris: You don't see coaching Little League as a variation on the theme of community service?

Zellerbach: No, there's a similarity.

Morris: It may be what they used to call "enlightened self-interest." There's a benefit. You usually go into Little League because your kid is in it, but the spinoff is a benefit to all the other kids on the team.

Zellerbach: I served as a chairman of the board of regents of St. Ignatius. Did I tell you that?

Morris: No. That sounds like an interesting variation. How did you get involved in St. Ignatius?

Zellerbach: Because I sent my three sons to St. Ignatius, and I felt that if the Catholics were going to educate my sons, I had to do something for the school.

Morris: Now, what were those nice Jewish boys doing at a Catholic high school?

Zellerbach: Well, I went through public high school, and you really did not get a quality education. You did learn to rub shoulders with everybody. What I got from going to Galileo High School was, I can get along with anybody. I really received no education.

Morris: But you got into the University of Pennsylvania. You must have learned something.

Zellerbach: I learned something, but the University of Pennsylvania also wanted someone from San Francisco. Let me tell you, when I took that English course, I was at the bottom of the class.

So I wanted my kids to learn how to--they had gone to Town School, which was very snobbish. I wanted them to learn how to get along with people not as well off as they. I did not want to send them away to school, because I just found those four years of high school were really my time to bond with my daughter and three sons. A stronger, different sort of bonding than we had through the first eight, nine grades. High school was when I started bonding. I just didn't want them to leave.

[Looks at wall behind him] I think this plaque is St. Ignatius over here. Chairman of the board of regents, 1966-1971. I helped them build their new school out there. During my tenure, we built this \$16 million plant.

Morris: That's a major fundraising job.

Zellerbach: I consider that my Little League baseball kind of community service.

Morris: It's an interesting balance of personal satisfaction and public service.

Zellerbach: I consider that different in my career then when I worked for the Hunters Point Boys Club.

Morris: What kind of carryover was there between those two experiences? What did you learn from Hunters Point that was useful at St. Ignatius or the other--

Zellerbach: Not very much carryover. But what I learned on the board of the Hunters Point Boys Club was extremely useful with the Family Fund.

Morris: In what ways?

Zellerbach: We were dealing with young blacks raised by their mothers. I was a new, idealistic trustee who wanted a black board of directors but couldn't create one.

Morris: You mentioned that before, and I wondered if in recent years you've seen any change or development, if you see an increasing pool of--

Zellerbach: I think that is the saddest thing that I've seen over these-- you see more successful individual blacks today, like your governor of Virginia, and the mayor of Atlanta, and mayor of New York, but they are few and far between. Our projects in East Oakland are just as miserable as my projects at Hunters Point Boys Club.

Morris: And yet there seems to be quite a lot of nonprofit organizations with black persons on their boards of directors, if you look for them.

Zellerbach: Well, we have a part-time, brilliant woman on the Family Fund staff. She is a member of the black social workers association of Oakland or Berkeley.

Morris: There is a professional organization of black social workers in Oakland.

Zellerbach: It's over there somewhere. Of course, what I would like to see is them just being part of the social work organization in the mainstream.

I mean, *when* is that going to happen? When is that going to happen?

Collaborative Funding: Early Intervention Concepts

Morris: I wondered if there are any ideas where you especially feel like the Family Fund has made a contribution in setting the trend or getting some new ideas going in the past twenty years.

Zellerbach: Well, Ed Nathan received the Scrivner Award given by the Council on Foundations for creative giving. You have to figure that good ideas he's found that other people want to try are the reasons for Ed's success, our grantees' success-- all the various committees he's on, people from the Ford Foundation who consult with him. That's how I have to look at it.

##

Morris: Reading Northern California Grantmakers's publications on cooperation between foundations,¹ I get the feeling that the Zellerbach Family Fund has done significant work in getting foundation groups together, two or three people to put a project together.

Zellerbach: Very much so. I just have to give all the adulation to Ed Nathan. I can't take any myself.

Morris: Really? You didn't provide an atmosphere in which Ed could pursue his ideas?

Zellerbach: Yes. Oh, I would say I provided, or the board provided, the atmosphere. We provided the right person, but it's all Ed.

Morris: Did the board discuss whether or not they wanted the foundation to go into all these joint endeavors and get into rocking the boat and saying, "We need to have a task force on the homeless or on Southeast Asian refugees?"

Zellerbach: Very much so. I may have mentioned this before, but we, right from the start, adopted a policy that we would have--we consider having a large staff the same as giving. We want our staff out helping.

Morris: Providing technical assistance to grantees?

Zellerbach: Technical assistance. Of course, that's really a basic reason that we're in this area, is because we want to help people improve their organizations. We don't care what you want to classify as administrative expense.

I remember my father saying, "We don't need a full-time executive." I would answer and say I agree, 50 percent of his time is enough to run the Family Fund, but if Ed is out working in the community on his other 50 percent, that is the same as giving money away.

[Pause]

Morris: So you do see Ed's work in the community as part of the way that the Family Fund has a role in helping the community make decisions?

¹Perspectives on Collaborative Funding, A Resource for Grantmakers, Northern California Grantmakers, 1985

Zellerbach: And the same with Ellen Walker and Gwen Foster, who do the evaluation and supervision of the projects we've given grants to; they come up with new ideas too.

Morris: One of the things that's noticeable is that the foundation does a lot of grants in cooperation with governmental agencies, county and state and things like that.

Zellerbach: That's been a trend in the last five, six years. That's been a super trend.

Morris: Again, some foundations don't like to make grants to organizations that are tax-supported. They feel that that's a conflict of interest for private philanthropy.

Zellerbach: Well, what we're trying to do is to make those tax-supported organizations more efficient.

Morris: So that, in a way, is kind of a way of influencing public policy. Is that something the trustees are in favor of?

Zellerbach: Ed and I spent about five, ten minutes this morning. He was talking about a meeting he was at yesterday. We gave the lunch, and this was mental health professionals from Yolo County and all around. He was mentioning, you know, they're all concerned about the budget constraints.

My reply to him was, "That's never going to go away." His answer to me was, "Well, that's exactly what I said during my little talk, that you've got to be able to change with the times. There were some people who resented my saying that you have to change with the times."

Morris: I was thinking about the way public funding has changed in the last twenty years, where we've gone from an era when there were lots of public programs, federal programs and state programs, for mental health services and social services. And then about 1980 Mr. Reagan articulated it probably most vigorously, that the government was spending too much money and we're going to cut back on services. Has that really had an impact on--

Zellerbach: You look at some of the statistics, and I don't have them in front of me, the amount--percentage--that we're giving is just as high today as it was in 1980 and 1970. But the methods of delivery are changing. There's one son that I said was in the public health. He was working for Steve Fields in these halfway houses where a person was not sick enough to be committed to a general hospital but needed two weeks' care.

This private enterprise could deliver this care for less money than the general hospital.

Now that's a change, and I'm sure that when that first started to come about, why, the people who were running the general hospital said, "Hey, more money should be going to this." They really weren't looking: well, could someone else deliver that at a lesser cost?

Morris: It almost seems as if there's a kind of an entrepreneurial potential to nonprofit organizations.

Zellerbach: Look at our teaching today. If ever there's been something that is now coming to the fore, it's the inadequacy of our school districts. I'm talking nationwide. There was quite a long editorial in the *Wall Street Journal*. I think it was Milwaukee where they said in the last year, they fired but two teachers in the whole Milwaukee school district. You know that if you're going to have a big school district, you're going to have more than two people that are incompetent. That's life, yet we're not getting anything done about those kind of things.

Morris: It's interesting. Do you think there will be some changes in teaching?

Zellerbach: I think you're going to see the dramatic changes--dramatic changes, where your tax money is going to be given to a person that they can go to the school of their choice with this voucher.

Morris: It sounds like you're not only idealistic but that, on balance, you're optimistic. Do you see some progress being made in solving some of the woes of the world?

Zellerbach: Well, I see this coming.

Morris: So that the work of the foundation does have some long-term payoff. It does help improve the quality of life.

Zellerbach: This village project down in Long Beach, mental health, is completely new. We were very responsible for it, and now they have two or three trial mental health villages, this one funded by the state.

Morris: This is the Integrated Services--

Zellerbach: Yes.

- Morris: That's a very appealing concept.
- Zellerbach: But, boy, you hear some of the public agency people cry, "You're on my turf."
- Morris: They object to some of the experimental projects?
- Zellerbach: They object to change; it's change. Whether you're in the public sector or the private sector, no one wants change.
- Morris: Did you ever know Caroline Charles?
- Zellerbach: No.
- Morris: Because she worked in the good and welfare for many years. She used to say that Americans love progress but that we hate change, which I thought was very entertaining.
- Zellerbach: Very well said.
- Morris: There's one last question I'd like to touch on. It's kind of where we started. It's about the Family Fund publications program. Is that something that you've got any statistics on or any sense of how far these publications get used and what kind of impact they may have on changing human services?
- Zellerbach: The feedback you get back, you can stretch your imagination for how much good they do. Now, people tell you that this is great.
- Morris: As I said, they're very appealing publications and put together very well. Has it become a kind of a policy of the fund to produce some kind of a pamphlet for every major program?
- Zellerbach: More a policy of the fund is seeing that things that we find out are spread. So this would be only one way.
- Morris: What other kinds of things have you tried?
- Zellerbach: Oh, film, just sending our staff out to give talks, working with these various government agencies.
- Morris: Does that ever include some talking to elected officials?
- Zellerbach: Yes.
- Morris: Do you get involved in that occasionally?

Zellerbach: No, no, because there also is a fine line between a charitable fund and lobbying.

Morris: A staff person can go talk to a legislator, and it's providing information?

Zellerbach: No, but a staff person is well-trained and well-disciplined in what you can do and what you can't do.

Morris: I see, and if it's the president of the board of trustees, that's a different matter?

Zellerbach: I don't know. I'd have to go and talk to my attorney or be sure that I didn't overstep my bounds.

Morris: But you're a constituent, too.

Zellerbach: Yes, if I talk as a constituent.

Morris: Any other things that we haven't touched on that have been important to you or that you see changing?

Zellerbach: I didn't think I had three sessions of information to give you.

Morris: I knew you did! It's been really interesting hearing your views on how things have developed. Anything else that we haven't touched on.

Zellerbach: No.

Morris: You get to read the transcript--

[Interruption]

Remembering Dan Koshland: Levi Strauss & Co. and the Community

Morris: One thing I've noticed in doing research for this project is how many new foundations have been started in San Francisco in the last ten years, and how varied they are in their programs.

Zellerbach: The Haas family is so outstanding that they could really be the model for anyone. What they did with the company's philanthropy is what I would have liked to have done if we had retained control of the Crown Zellerbach Foundation.

Morris: Do you feel as if they've been role models to you over the years?

Zellerbach: Well, I grew up with--like, Wally [Haas] and I started the Hunters Point Boys Club.

They were able, just within their business, to take it private and do the things that I would have liked to have done with Crown Zellerbach.

Morris: In terms of actual corporate involvement in the community?

Zellerbach: Yes.

Morris: It's interesting, as a business, too, the way the Levi Strauss company has grown and responded to change, as you were saying.

Zellerbach: They were remarkable.

Did you tape Wally's history?

Morris: We did, as part of a company history.¹ We've also interviewed Dan Koshland, too, who was kind of the grandfather of so many community projects.²

Zellerbach: His father was.

Morris: Oh, I'm sorry. I don't mean the professor Dan Koshland.

Zellerbach: The original Dan.

Morris: The original Dan.

Zellerbach: The most wonderful man in the world.

Morris: You came under his influence also?

Zellerbach: Oh, you bet. Was I! I'll never forget the day he walked into my office, looked me in the eye and said, "Bill, you're going to chair the United Negro College Fund drive."

I nodded and said, "Yes, I am." [laughter]

¹In Levi Strauss & Company: Tailors to the World, Regional Oral History Office, University of California, Berkeley, 1976.

²Daniel E. Koshland, Sr., The Principle of Sharing, Regional Oral History Office, University of California, Berkeley, 1971.

- Morris: You hadn't thought about it before then?
- Zellerbach: Oh, no.
- Morris: When was this?
- Zellerbach: It must have been five, ten years before he passed away.¹
- Morris: Oh, that's marvelous. Was that the first time that you had done a major drive?
- Zellerbach: No, no. He and we had been interested in the Negro College Fund drives for years. He just said, "It's your turn to take it over."
- Morris: [laughs] Does that device still work, that somebody with the stature of yourself or Dan Koshland says, "It's your turn," and people reply OK?
- Zellerbach: Sure. [Tape unclear] Dan and my father were the best of friends. My father idealized Dan, shared a lot of Dan's principles and they worked together on a lot of things.
- Morris: I get the feeling also that Dan Koshland kind of kept his eye on the next generation. He had obviously been watching you and decided it was time for you to move into more responsibility.
- Zellerbach: He just said, "You're going to do it."
- Morris: Did he back that up with being available for advice?
- Zellerbach: Yes. You knew you could go to him for any advice you needed, but you had to go out and do it. [Tape unclear]
- Morris: What kind of results did you see in the Negro College Fund drives?
- Zellerbach: Sometimes I worry about that. A while ago I went down to Fresno and came home late at night. I went off the freeway and came through a minority neighborhood and saw two black kids with bottles full of some liquid. Here it was, eleven o'clock at night and it looked as if they were trying to light whatever was in the bottles and maybe throw them on the roadway.

¹Mr. Koshland died in December 1979.

Morris: Oh, how scary. Too bad.

Zellerbach: Well, thanks. Nice to have seen you.

Transcriber: Noreen Yamada
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Berkeley, California

History of Bay Area Philanthropy Series

Edward Nathan

ENCOURAGING PERSONAL GROWTH AND PROGRAM RISK-TAKING
IN THE FOUNDATION COMMUNITY

Interviews Conducted by
Gabrielle Morris
in 1990

BIOGRAPHICAL INFORMATION

(Please write clearly. Use black ink.)

Your full name EDWARD ARBE' NATHAN

Date of birth 11/30/19 Birthplace GREAT FALLS, MONTANA

Father's full name HERBERT ARBE' NATHAN

Occupation MENS CLOTHING STORE OWNER Birthplace GREAT FALLS, MONTANA

Mother's full name ELISE BLOCK

Occupation Housewife Birthplace SAN FRANCISCO, CALIF

Your spouse HARRIET SIEBEL NATHAN - EDITOR - WRITER

Your children ELINOR BERNAL

ANN NATHAN

Where did you grow up? SAN FRANCISCO

Present community BERKELEY

Education AB UNIV OF CALIFORNIA 1941

MSW - UNIV OF CALIFORNIA - SCHOOL OF SOCIAL WELFARE 1952

Occupation(s) FOUNDATION EXECUTIVE - LICENSED CLINICAL SOCIAL WORKER.

Areas of expertise SOCIAL WELFARE, MENTAL HEALTH, ADMINISTRATION,
CLINICAL SOCIAL WORK, PROJECT AND PROGRAM DEVELOPMENT -
Job Coonselling

Other interests or activities PAINTING, GARDENING, LEGISLATION

Organizations in which you are active NORTHERN CALIFORNIA BRANTMAKERS,
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EDUCATION

University of California, Berkeley	B.A. Degree
University of California, Berkeley	Masters of Social Work

EMPLOYMENT

The Zellerbach Family Fund, Executive Director	1972-Present
Contra Costa County Family Services Agency Volunteer Counselor	1970-1988
University of California, Berkeley Graduate School of Social Welfare - Faculty	1966-1972

COMMUNITY SERVICE

Member Advisory Committee to California State Dept. of Education on Model Curriculum Standards	1984-1985
Chairman of the Citizens Advisory Council to California State Department of Mental Health	1975-1977
Zellerbach Family Fund, Trustee	Present
Ernst D. van Loben Sels Foundation, Trustee	Present
Chairman, California State Advisory Council on Refugee Assistance and Services ..	1981-1983
Co-Chair Foundations/Corporations Emergency Family Needs and Housing Assistance Fund	1983-1988
Co-Chair Mayor's Committee on Targeted Assistance	1984-1987
Member Advisory Committee on Refugees and Immigration to California State Senate and Assembly	1984-1988
Council on Foundations Robert W. Scrivner Award for outstanding creativity by an individual grantmakers.	1986
Special Committee on Mental Health of the State of California Commission for Economic Development	1986-1988
U.S. Small Business Administration Award as "Minority Advocate"	1987

IV PERSONAL BACKGROUND

[Interview 1, April 12, 1990]##

Growing Up in Montana and San Francisco

Morris: We usually start at the beginning with some personal background. The first question is--am I right--you're a San Francisco boy?

Nathan: I have lived in San Francisco longer than lots of people, but I was born in Great Falls, Montana. My paternal grandparents were pioneers in Montana.

Morris: Were they from the United States or had they come in from another country?

Nathan: My grandmother [Frances Nathan] was born in New York City and my grandfather [Argé Nathan] was born in Europe. I think some of the early childhood experiences I had in Montana were preparation in some ways for some of the things I do now. I lived in Montana until I was seven years old, when my father died. My mother [Elise Block Nathan], who had been born in San Francisco, returned here because of her family connections in San Francisco.

Some of those early recollections in Montana are most likely screen memories--but as a youngster I was a leaping frog in an early Great Falls opera, so I was performing in front of people when I was five or six years old. I recited the American Creed to the Rotary Club dressed in a George Washington outfit when I was six years old. So I have been giving speeches and from very early childhood on.

Morris: That sounds like your father was active in the Rotary Club.

Nathan: Yes, my father was a small business man. He ran a clothing store, and was extremely well liked. When I was eighteen I returned to Great Falls on a vacation trip with my life-long friend Walter Miller from San Francisco, people would come up to me on the main street and say "Oh, are you Herb Nathan's son?" So he must have been very remembered and well-liked. He was in the kind of organizations that businessmen join, the Rotary Club, Masons. Fraternal and business organizations were most likely more popular then than they are now.

Those early childhood experiences have a part in forming your personality. The losses that you experience have something to do with the way you see life. I was with my mother and my sister in Long Beach, California, when my father took ill. We hurried back to Great Falls. He died after one or two days, and so one of my last Montana recollections is of my father in the hospital. So that now even when I go on a trip there is always a little uneasiness about returning and what's going to happen. It's just one of those very vivid demonstrations of how your life is influenced by your experience.

Morris: The unexpectedness--

Nathan: Right. And then there were other experiences. My sister [Margaret Nathan Marks], who is older, has been some influence in my life, was taken ill with scarlet fever when she must have been about seven and I was five. It left her with some paralysis. I did see my mother work intensively with my sister, and my family gave attention to her growth and development. I learned a lot from that, too, since I would help her open and close her hand, or manipulate her foot. We would get into these very strong brother-sister arguments about that. But I think that also prepared me for some of the attitudes I developed in social work, or I suppose tangentially in foundation work, about persistence and commitment, dealing with disappointments and challenges.

Morris: It sounds as if there was some progress made with your sister--

Nathan: Well, Margaret has had a remarkable life, having gone through the University of California, Berkeley, has children, leads a very, very full life. I think part of that had to do with the hard work and the commitment of the family.

The family concern about my sister also left me free to grow more on my own without as much family attention as other children receive. I think that has something to do with my sense of independence, and going my own way, although I didn't grow up

without supervision. But I think the family's concern had to do with Margaret's growing up.

Morris: Was there a large group of family members in San Francisco when your mother moved back here with you and your sister?

Nathan: Oh, yes. My mother had four brothers and they had all married and had families of their own. They were all in the San Francisco Bay Area. The family would get together at holidays. It's a family I used to see a lot, not so much any more. Life changes and you develop different kinds of interests. But there is a family feeling, and I care about my relatives--cousins and nieces and nephews.

Morris: How about religion and schooling and things like that in San Francisco?

Nathan: I've been to a good many schools in San Francisco. We moved quite a bit. I attended Grant, Pacific Heights, and Madison. Those were all grammar schools. I went to school at Roosevelt Junior High and to Galileo High School. Through junior high school I continued to be very active in drama, public speaking and debating. I held school offices in most of the schools that I went to, without quite knowing how I got there or what I did to get elected. I never really had a strong commitment to school politics, but it just seemed to happen. Julia Ross, a junior high school teacher, was a great influence in my life. She urged me to devote my life to public service. It took me a while to follow her guidance.

The doorman at one of the apartments we lived in was an influence on my thinking. Joe parked cars and did other chores. Joe was black and, from a ten year old's perspective, was much more outgoing and friendly to me than tenants and other grown-ups.

Joe used to talk with me about discrimination and the need for fair treatment and equal opportunity. Because of Joe I made contributions to the NAACP before I was fifteen years old.

I was certainly aware of the Depression and W.P.A. [Works Progress Administration] projects and business failures. My second father [Alfred Hofmann], who was in the butcher supply business, was forced to close down.

Morris: Were there public-policy issues of the time that you were interested in?

Nathan: I had really grown up in a very protected, narrow, comfortable environment. Madison School served the Pacific Heights area and was mostly white. Roosevelt Junior High served a larger area including an established black district. We all kept to ourselves. It's the way it remains today although the hostility was more covert, and violence and drugs were not a concern.

Morris: Did you continue your interest in the theater in grammar school?

Nathan: My interest in the theater was strong during those years. When I was in grammar school, I was a part of a performing arts group working out of Temple Emanu-El. When I was ten I was around older people, who would have to have been somewhere between 18 and 25. As a ten-year-old, I was spending my evenings sitting in the auditorium doing my homework, but still being in the play, waiting for my turn. I found then that I was able to memorize everyone's lines and was able to be of some help as a prompter during the play to people who were in high school and in college. So I think that has something to do with my way of feeling comfortable in a variety of situations.

Morris: With different age groups and things like that.

Nathan: Yes. It's quite a role reversal now, but I was always the youngest person on a board of directors working with older people. I think that in foundation work or in community work or on state committees, somewhere along the line, that experience serves me well, although I find now I'm more restless and bored. It's always a little *deja vu*, because I started so early. I started being a working part of groups early in my life.

University of California, Berkeley, 1937-1941

Morris: Had you always intended to go to the University of California, or was there some other possibility?

Nathan: No, I really never saw that as much of a choice. I was just very grateful to be admitted. My family was under considerable stress during my high school days. Although I hadn't realized it at the time, my concentration and my interest in school was very, very much affected. I was an average student, but I went home to a very troubled home. My father couldn't get established in another business and was very unhappy. I was not very psychologically sophisticated at that time. Maybe I shouldn't have been at fifteen, but I was in some ways not able to do my best work. So I was very happy when I was admitted to the University of

California. It wasn't as difficult to be admitted to the University of California then as it is now; the numbers were not as great. Now you have to be very special.

My sister had attended the university, and had been in a sorority. When I attended UC, my family had increasing financial concerns. I was invited to live with an uncle and aunt [Roy and Edna Block] in Berkeley on Montrose Boulevard, not far from where you live--where Santa Barbara comes into Montrose. It was a very lovely home. I was alone there.

Morris: They didn't have any children?

Nathan: Their only daughter, Marian, was married and out of the home. Marian lived in Berkeley and was a good friend and confidant. We played golf at Tilden. I remember having breakfast with my Uncle Roy. Roy followed very precise patterns. He always had smoked cod, soft boiled egg, and hot water with lemon for breakfast. All this was followed by a cigar. I always arrived for breakfast when he was puffing on the cigar. Edna and Roy were very generous to me. My Aunt Edna was a rare and magical person. She told fortunes with cards. Her predictions always were happy ones. She dressed in a witch's costume on Halloween up to the time she was in her seventies. We all loved her. She brought out the child in all of us.

But I lacked involvement in the life of the university. At the time I was drifting through.

Morris: That's an interesting role reversal, that the daughter of the household participates in campus life and the son lives off campus. Quite often it's the son who receives the extra family support.

Nathan: In some ways I was very independent and Margaret needed the family support. I did have a good many friends at the university. The group that I had grown up with in San Francisco I still see today; a group of us that went to an athletic club and to a boy's camp. The group includes Walter Miller, Irv Reichert, Carl Foorman, Richard Goldman, James Abrahamson, Ted Geballe, Dan Koshland, Jr., Sissy Geballe, Phyllis Friedman, Bill Zellerbach and Louis Saroni.

I've known some of these friends since I was five years old. I knew Richard Goldman in Great Falls, Montana, because he visited his grandparents who lived there. To have these lifelong relationships is very rare these days. I was able to keep in touch with these friends at Cal, but that was like taking a high school experience and moving it to the University of California. It wasn't the kind of broadening experience that I think I should

have had. It's hard to know if that had to do with some cautiousness on my part or some retreat because of the situation with my family or just going through a painful adolescence. I don't think any of my friends would have seen this side. This isn't something men share with each other. I didn't grow up as a terribly sharing person emotionally, so that these were very quiet, personal struggles. Friends generally sought me out to share their concerns.

There's nothing special about my life in that sense, except I think I have a pretty good understanding of it. Remembering that part of my life helps me in social work, and in counselling and in psychotherapy. But I think other people had much more difficult lives. I mean, no matter how I look at my life, these were personal kinds of struggles. I came from a family that always tried to provide help and support and understanding.

Morris: Nowadays, it's common for people to say the university is so big; there are so many people, so many students, and so many different kinds of activities that it's hard for one youngster to find a niche, whether they live on campus or off campus. Do you remember having that kind of a feeling?

Nathan: Well, my university life changed after two years because my friend, Carl Foorman, needed a roommate, the old-fashioned kind of roommate. Carl phoned and asked if I would be his roommate in a boarding house where there were other people living that I knew. Then I had more of a sense, not of campus life, but being part of a group. And that made quite a difference. It also made a difference in my academic achievements, because Carl was an excellent student who knew how to concentrate and how to apply himself. He was Phi Beta Kappa and chairman of the Honor Society.

We got along very well. I learned something about studying from Carl. He was an important part of my life, and I most likely brought some humor and some perspective to his.

Morris: Sense of drama?

Nathan: A sense of how to live at the edge of a cliff--how to go into difficult situations and resolve them. I think that my family's background and his were quite--I think the expectations of the families were different. I think my family's trust in my judgment to work out my life, and my freedom to do that, helped me in some ways. I think Carl had a family that had different expectations of him and were constantly letting him know that.

Morris: Urging him on--

Nathan: It's neither good or bad. I most likely could have stood a little bit more surveillance, and others may have done better with a little less. There's no perfect balance there.

Morris: You wonder how many families actually give conscious thought to what they expect of their children, and how they convey that expectation.

Nathan: Well, I think a lot of that depends on the family's need. Certainly, one would like to assume that all families have the interest of their children at heart. But I don't think many families know that they are leading part of their own lives through their children's accomplishment. So that does affect the nature of those relationships. I think it affects the outcome for those children as well.

Morris: Were you studying social welfare at this point?

Nathan: No, I was not sure of what I was going to do. At that time I was rather foolish in the way I organized my courses. I was always bold about taking a course meant for majors. I would find myself in class with highly motivated students, so I was always struggling to keep up. I could have made my life easier then; but I really didn't know what I was going to do with my life, so I took the general curriculum.

The first inkling that I had some capacity for social work was when I began to be a reader for blind students. There was a little financial incentive, but it could not have been major. I was a good reader, and I was interested in doing something that was extracurricular. I became a reader for Rose Resnick. Rose was a very impressive person who would ask me to describe a football game or what people were wearing. I must have been Rose's reader for a year and a half or two years, and I learned some appreciation of what being without sight is like. Rose went on to become a leader in the community. In fact, there's a Rose Resnick program in San Francisco that she initiated.

Morris: One of the early champions for the disabled--

Nathan: Yes. I've lost track of Rose, but she was an important part of my learning in terms of what people can accomplish.

Morris: You were reading to her the books for the courses she was taking?

Nathan: Yes, I was reading to her so that she could understand the text.

Morris: Were they the same courses you were taking?

Nathan: No, her courses were in education. Rose was a very fast study. She would hear something once and understand it. Sometimes we would talk about the material. I suppose if one looks back to trace the early signs of interest in people, I would say that this experience was significant.

Morris: Were there any faculty members who were specially important to you? Or courses you especially enjoyed?

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Nathan: I liked the more eccentric professors. McIntyre who translated Baudelaire. McIntyre wrote poems about cathedrals while drinking in a pub across the street. He taught a course in poetry writing. My poetry would come back with wine spots all over the page. He would identify the spots as grape juice. We had an excellent writing relationship.

Morris: How did you and your friends at Cal feel about the war in Europe? The likelihood that we would become involved? Did you think of enlisting in the army or navy, or have concerns about signing up for the draft?

Nathan: I can't say that I was motivated to join the service even though I believed strongly in the justice of our involvement. I was classified limited service because of my eyesight. It seemed odd because I was an excellent athlete. I wasn't called up but did join a volunteer fire department and half scared myself to death by climbing up ladders over multi-story buildings.

Integrating Uncle's Coat Factory; Expectations of the Forties

Morris: What were you doing in the early years of the war?

Nathan: As it happened another uncle, Charles Block, offered me a job in his leather coat and sportswear factory on my graduation from Cal. The family was still under financial pressure. I wanted to marry Harriet [Siegel Nathan] so I accepted the job.

I did a lot of different things in the plant in the six years that I was there. I learned a lot about cutting leather and sewing, the production side in general. There wasn't much challenge to it, but I did get interested in the people who worked there.

Nathan: Harriet [Siegel Nathan] and I became friends with a good many of the pieceworkers. Most garment workers were women from El Salvador, Italy, and Greece. I also became friends with staff at the United States Employment Service. That was before the Employment Service reverted to the state. At the time, Mae Carmody, Elizabeth McEvoy and Ann Rabinowitz, who were committed to affirmative action, began to influence me. They urged me to hire black workers in the factory since there were few minorities employed in the garment industry--not really many in industries that were unionized or becoming unionized.

I developed some convictions about equal opportunity and began to face all of the prejudice that the existing workers had about people of color. They didn't want to use the same bathroom. They didn't want to have somebody sitting next to them at the sewing machine--it's a rather close, sweaty situation, where all of the misinformation about body odor and everything else was sort of coming to the front. I began to hold group lunch sessions, without knowing much about group work or use of authority.

We did end up with one of the first integrated factories in San Francisco. Even during the war with Japan I was able to hire some Asian workers. Eventually, these new workers who were Asian were accepted by the group.

Morris: Which by then already included some black workers?

Nathan: Oh, yes, the black workers were first, and the Asian workers were second. There was actually a radio program sponsored by the Council on Civic Unity about this experience in San Francisco because it was somewhat rare.

Morris: Were you on the radio program?

Nathan: No, the people from the factory provided information for the program. I really owe a great deal to the persistence of the group of people at U.S. Employment Service who felt I was educable. That's the only way I could put it. They found a young man with some authority--in his formative years--who could champion their cause.

Morris: What about your uncle and the front office? How did they feel about this?

Nathan: I felt this was more of a personal struggle. There was a factory manager who was supportive of what I was doing--Oscar Pollack.

Morris: He had your uncle's confidence, or you had your uncle's confidence?

Nathan: I had my uncle's confidence. I think Oscar Pollack was very capable, but he was older and I was younger. As you get older-- there's sometimes a feeling you should move. Oscar was at the point where Charles Block felt he should move on. I was seen as the person who was going to replace him. And I became very uncomfortable with that unspoken arrangement.

Morris: That you were there for life?

Nathan: That I was pushing someone out who needed to work. The rag business, as we called it, was also a narrow part of life. I also came to believe that the garment industry based on piecework and low wage scales exploited people.

There is nothing wrong with being in business. It just didn't seem right for me. It all seemed too arranged. I didn't want Oscar to lose his job, and I had the urge to be involved in public service.

Morris: But also, if we're talking early forties, middle forties, at that time, there was a large expectation that when you had a job, you had that job for life. If you were fortunate you might get promoted at the company.

Nathan: Right. If you had a job for \$250 a month, consider yourself lucky. You would eventually buy a house for \$10,000; you lived there forever, and there would be music going when you walked in the door. So there was the sense of stability that you wanted. That came from the Depression mentality and the insecurity of your early life.

Morris: But a lot of people don't remember that era. What I'm interested in is why that was not sufficient for you. You obviously felt that was not what you wanted.

Nathan: Well, I learned at the factory that what I valued most in the firm had to do with the relationships with the people who worked there, and with the affirmative-action struggle. That proved very challenging, whereas--well, I had already gone past the grading of leather. That was a real hands-on job. I wasn't just the nephew who was put in there to run the place.

I graded leather for about a year. That's like being the sorcerer's apprentice. You have a stack of leather, from the floor halfway up to the roof, and you take a piece of leather, and you throw it out in front of you, and you decide whether it's grade one, two, three, or four. That depends on the

characteristics of the leather--we were making leather coats. I used to grade leather for a good many hours a day.

As I think back, that experience helped me make up my mind in a hurry. I can do that now without a lot of procrastination: taking a look at a situation and coming to a conclusion. Maybe that's reading something into what was a very labor-intensive job. But I think it also helped me appreciate what it's like to work in a steel mill, or to do menial work, and how that can wear you down. Your mind needs to be three or four different places because there's no great satisfaction outside of getting your paycheck.

Marriage, Jewish Welfare Fund; Fundraising for Israel

Morris: What precipitated your decision to go back to school?

Nathan: I didn't go right back to school. Of course, I was married at the time. Harriet has been a very great influence on my life.

Morris: Did you and Harriet get married right out of college?

Nathan: Yes. We met each other in an odd way. I had gone through the university in this aimless way without being involved in any school activities, and began to feel that I had really missed something. I decided that I would try to be on the Senior Week committee--seven-eighths out the door, and trying to say, well, for the one-eighth of the time, I was going to do something that made me know that university life existed.

I kind of forged my way onto the Senior Week committee, because I had no credentials. Universities are very political with inner circles inside of inner circles. I said that I had had some experience in advertising or something that gave me some qualification. I was put on the Senior Week committee. Everyone else on the committee knew each other.

Harriet walked in knowing everyone. It developed that she had been the first woman managing editor of the Daily Cal, a member of Phi Beta Kappa in her junior year, Prytanean, and Mortar Board. We met on that committee. I think Harriet was interested in me because I was someone new and not politically identified. I was most likely naive and maybe a breath of fresh air since I could ask questions that were not related to the politics of the class.

When we graduated, we kept in touch. Harriet worked in San Francisco at Hale Brothers in the advertising department and lived out on Pacific and Steiner in a boarding house. I lived with my family on Pacific Avenue--kind of a Magnificent Ambersons life¹, where we had gone from very fine apartments to less fine. Always in the same district, but on a downhill slope. Harriet and I married a year after being out of school. Harriet sensed my feeling trapped in the garment business that I really didn't enjoy.

Morris: Did you have some responsibilities financially for your mother?

Nathan: No, when I talk about family difficulties, it's all relative. I mean, it depends upon what you think life should be. My family was never poor. My family never had to give up anything that mattered. I didn't give up anything. It just was in comparison to the people I went with, whose families were much more successful or affluent. I was always included with this group because I was a good friend and athlete, and was easy to get along with, and had some of these elusive leadership qualities, whatever they are.

Morris: Looking for an outlet.

Nathan: It was with Harriet's encouragement that I decided to look other places. I had grown up with a group of friends that included Dan Koshland's children. So I knew Dan Koshland [Sr.]. He was an empathetic and approachable person; he has been a mentor for many people.

I went to Dan and talked with him about my dilemma and my interests. Dan steered me to the Jewish Welfare Fund, since they were looking for an associate director. The job was primarily fundraising, budgeting and organizing. It was at the time the state of Israel was coming into existence. There were lives on the line, wars were being fought, guns being smuggled. It was an incredible time to be affiliated with the welfare fund. I decided that I would leave the H. and L. Block factory, to the disappointment of my uncle. I applied for the job at the Jewish Welfare Fund and was hired.

That was a growing but trying experience. I became very committed to the work we were doing. It involved numerous night meetings and speaking engagements. That took me away from my family a lot. I didn't even realize it at the time. I saw that now we had delightful young children, Elinor and Ann, but this was

¹Booth Tarkington, Garden City, New York: Doubleday, 1978.

the kind of a job that you either went all out in, or you didn't take it. Elinor must have been about one year old when I changed jobs. Ann was born in 1947, two years later, when I was in the midst of trying to meet the demands of the Welfare Fund job. Elinor and Ann were wonderful children. In one sense I was an absent father without realizing it in their very early years.

Fundraising is always frantic and tension-filled. But then it was really for the establishment of a state, and it was a very controversial issue at the Welfare Fund.

The San Francisco Jewish community was led by someone that I knew very well, Rabbi Irving Reichert; Irving Reichert, Jr., was always one of my closest friends. Rabbi Reichert and the well-assimilated German-Jewish population of San Francisco were fearful that the establishment of the state of Israel would be detrimental to how the Jews were viewed in the United States, a questioning of their loyalty. There were very strong disagreements between the Zionists and the German Jews, who were much more assimilated in San Francisco. I was a part of the assimilated group, but I began to respect more and more the convictions of those people who were the small businessmen, the group that was not involved in the established cultural and social life in San Francisco.

Morris: And it was the smaller businessmen who tended to be more likely to be Zionists?

Nathan: Yes, I would say so. The longer-established families--those who had been a part of San Francisco's growth and culture--the prominent families; the Zellerbachs, Haases, Hellmans and Dinkelspiels were very much under the influence of Rabbi Reichert. This put me into a great conflict, because here I had this close, personal, emotional involvement with the Reichert family, and my convictions began to go the other way.

Morris: And yet, it looks as if the old, established, German-Jewish families also over the years have come through very handsomely with the fundraising for the state of Israel.

Nathan: Their ideas have changed. I mean, this was the beginning. Since Rabbi Reichert left, there was Alvin Fine, and Rabbi Brian Lurie and Robert Kirschner, all coming from more orthodox backgrounds with much greater commitment to Israel. This was the early struggle, and all the fantasies of loss of prestige were there and dual loyalty. The humanitarian concern became the overriding one for me. I was immersed in all aspects of helping Israel get started.

It was during that time that I worked with Treg [Sanford Treguboff], and learned something about organization, agendas, boards, charts, and research--all those routine duties of foundation executives, or any administrator. Treg was helpful to me. I was kind of the drone, the get-things-done person, and Treguboff was taking the bows, not that he didn't do his job well.

Morris: You would do the putting-together of the lists and the potential resources and he would go out and make the speeches?

Nathan: I could make the speeches and work with the community. Treguboff worked with the millionaires; I worked with the less-than-millionaires. There are a lot more less-than-millionaires than there are millionaires. So in dividing the workload, he'd work where there was gold, and I worked where you had to dig harder to get reward.

Morris: Was there some discussion between you on that subject?

Nathan: I only talk about it now. I never questioned. Nor was I in any way resentful. We were a good team. I was glad to be working, and very glad to be appreciated.

Morris: Well, the raising of money certainly is a part of philanthropy.

Nathan: And the budgeting part. There were decisions made about San Francisco institutions and who should get what amount of money and how much. It's essentially no different than typical foundation work now, except in a more narrowly defined field.

San Francisco Institutions and Leadership

Morris: At that point in time, how much of the work was directed toward Israel and how much was directed toward the Jewish agencies in San Francisco?

Nathan: About 80 percent overseas and 20 percent locally to community centers, educational institutions and public-relations efforts.

Morris: Public relations?

Nathan: What I call public relations--that's most likely not the best term: efforts to combat anti-semitism, or to support those efforts in the community that help everyone in the community including the Jewish community.

Morris: Like joint activities that would be funded by Protestants and Catholics too?

Nathan: More likely an organization that was heavily subsidized by the Jewish community. I think the Jewish community in San Francisco has always been forward-looking in terms of their support for activities that benefit all of San Francisco. If you have a healthy community, then your life may be healthy too; I think that has always been the perception.

Morris: Above and beyond things like the United Way?

Nathan: I think if there's going to be a Hunter's Point effort or an effort at creating community harmony, you'll find that the financing depends on the philanthropy of relatively few people.

Morris: One of whom usually seems to have been Dan Koshland.

Nathan: Also Harold Zellerbach, Walter Haas, Lloyd Dinkelspiel, and Marco Hellman. These were very generous people whose participation in philanthropy has been very positive. These were people I knew quite well. Of course, I knew their children, who are my contemporaries.

Morris: Who were the people in the Catholic or Protestant groups that had similar kinds of concerns about the good health of the community?

Nathan: I'm sure there are some individuals. I'm just not informed.

V EARLY SOCIAL WORK CAREER

UC Graduate School of Social Welfare, 1950s

Morris: How did you take the next step in your career?

Nathan: The work at the Welfare Fund did help my development. But I began to feel there as I did at the factory that I was in a dead end. Without professional training, I wasn't going to have a breadth of opportunity. I guess, no matter how competent you are, there's uncertainty about change.

Harriet was of great help and encouragement to me in suggesting that I might consider applying to the Graduate School of Social Welfare at Berkeley. I didn't remember my university experience with great fondness. Going into a graduate program stirred up all those feelings of self-doubt, even though I was in quite a different situation. I was also highly motivated.

Morris: Did you do graduate school at the same time you were at the Welfare Federation?

Nathan: The Social Welfare graduate school required a two-year full-time effort. The group at the Jewish Welfare Fund provided funds for me to attend graduate school. They held a testimonial luncheon--and everyone that I had worked with must have contributed. It was a year's wages. That was a very generous send-off. I had an excellent experience at the School of Social Welfare at Berkeley, which I think, along with all these other experiences, prepared me to have some sense of adventure in foundation work--twenty years later.

Morris: Well, what I also hear is a fairly strong sense of ambition--high expectations for yourself.

Nathan: I never quite saw myself that way. I suppose I was interested in doing something useful, and if one interprets that as ambition,

yes. I felt a sense of responsibility to return something to the community. I thought I would go to the School of Social Welfare and come back to be a part of a social agency in the Jewish community, actually.

Temple Emanu-El; Dealing with One's Social Values

Morris: Is that a lesson you had heard at temple? Did you listen, or pay any attention to the old teachings?

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Nathan: It was more that a group of generous people from the Jewish community had made my graduate education possible.

Morris: I was specifically asking about the teachings about philanthropy.

Nathan: That was a part of me--fairness, sharing and the capacity to be compassionate. I think I was also working through, at the time, some of my own racist feelings and distortions. This goes back to the factory--we're jumping around--but when I worked at the factory, although I was trying to get people from different races to sit next to each other and to work together, I had a certain discomfort myself about going to restaurants on Mission Street and eating and drinking and using the implements that people of other races had used. I had all of the crazy distortions--stereotypes--that everyone else had.

I think the intellectual idea of acceptance of people, understanding other people, may have come some from religious education. I think that the social values of Judaism had an influence on me. I think now that's not the only way to find social values. I've grown way away from organized religion as the way to develop one's character.

Morris: That's undoubtedly true; and yet Judaism has a nice way of defining and categorizing the good citizen that I have not encountered elsewhere.

Nathan: Judaism does encourage social responsibility. From the Code of Maimonides you realize that the one who gives at the highest level is the one who is never acknowledged for what they do. I believe that, although I managed to get affiliated where there's a tremendous amount of acknowledgment for what one does.

Morris: Isn't that an interesting contradiction.

Training Experience at the Veterans Administration, Langley Porter Neuropsychiatric Institute, and San Francisco Children's Hospital Child Guidance Clinic

Morris: Going back to graduate school, where did you do your social-work placement?

Nathan: Well, you know about social work placements. Where did you learn that?

Morris: A number of my closest friends have studied in the School of Social Welfare.

Nathan: I had two placements. One was at the Veterans Administration in Oakland, which was an outpatient service. Often the main goal of the client is to maintain the disability rating that the government has given. One goal of staff is to try to prove that the person no longer needs the disability classification. That's a great dilemma. I had some wonderful learning experiences there with a fairly disabled group of people and with their families.

I suppose one of the situations that I remember the most clearly was meeting with a brain-injured veteran who had lost his sight and whose life had been totally changed by the war. I visited him weekly for six months. He didn't know what I was doing there. I didn't know what I was doing there either, but I knew that I had to hang in with him. I was finally confronted with, "Why have you come here all this time? Are you getting paid to see me?"

It was the moment of honesty, when you have to level that this is an assignment of yours, but you care about his life too. It was a tragic situation where his son would dance in front of the father and make fun of the father. I tried to be of some help to the youngster and to the wife, who was restless and felt trapped. You could see the tragedy of life there and the limitations of what you could offer.

What really changed my career in social work was a placement at Langley Porter Neuropsychiatric Institute [at UC San Francisco]. LPNPI was one of the very select and sought-after fieldwork placements. It was a highly analytic setting with a very heavy emphasis on collaboration and conferences.

Morris: Between members of the staff?

Nathan: Between the members of the staff working together and community agencies. If you weren't able to work together, then the people you were seeing were not going to improve very much, but would be undermined by your own staff.

Morris: Because each patient saw numerous staff?

Nathan: LPNI was run in the traditional way, where one person worked with the child and another person with the mother, and another person would work with the father. It turned out that I was seen to have strong psychotherapeutic skills and was given every encouragement to become a psychotherapist. That was not what I had in mind. I came to the school with a much greater social purpose, to improve the world, not so much one at a time or three at a time, but in some more dramatic ways. The staff at LPNPI and UC wanted me to continue with psychotherapy and not go into administration, which had been my original intent.

It so happens that where you get your first job often determines what you're going to do. All the fine philosophy about what you're going to do with your life is governed by the reality of what exists. When I went out looking for work, the people who I thought would welcome me back home after the wonderful send-off just turned out not to be as welcoming, not the donors but the professionals in social-work agencies. There weren't the jobs there, as I see it now.

So the Langley Porter crowd steered me to [San Francisco's] Children's Hospital Child Guidance Clinic, which was an unofficial branch of Langley Porter. Children's was a training clinic for child psychiatrists and social workers. There I came under the influence of an analyst, Maury Kaplan, for about eight years. My work was supervised by a psychoanalyst. We worked very well together, and I enjoyed the work, and was successful at it. Mary [Maria] Jeffress was the chief social worker. Mary and I still keep in touch.

Morris: This is primarily one-to-one type of therapy?

Nathan: We were working pretty much one-to-one. We organized some collaborative projects with the probation department, with the courts and public schools.

Maury Kaplan was totally disinterested in administration or fundraising. I moved into that role and became the link to the Little Jim Club, which was the arm of Children's Hospital that sort of did good things for various services of Children's Hospital.

Morris: That had quite a social status, didn't it? Lots of newspaper coverage of their big annual fundraiser.

Nathan: Yes, that's when I first learned about martinis at lunch with the women's groups. I really didn't know much about that side of life. But I liked the women in the Little Jim Club. They helped to finance a children's ward at the hospital.

Morris: Was that a major piece of funding?

Nathan: They helped with the library and bought our furniture. It was important to have someone interested in us. Psychiatric service in general hospitals is often not looked upon with much favor.

Morris: I was such a volunteer at one time, and I remember being somewhat shunned by the rest of the volunteers in the hospital who thought there must be something odd about anybody who chose to volunteer in a psychiatric ward.

Early Comprehensive Services; Public-Private Partnerships

Nathan: It was during that time I became involved in the politics of the mental health field. That was when the Short-Doyle program was just beginning in California. The plan was to provide service in the community at a higher level and at a more comprehensive level than the state hospitals or individual therapists in private practice could offer.

Morris: And offering some state funding--

Nathan: There was state funding for it. The concept that was important was comprehensive service. Rather than have a psychiatrist refer you to a day-care center one place and to a vocational-rehabilitation person somewhere else, and you'd get your medication somewhere else, there was an attempt to organize a comprehensive service where you'd have a unified system that was linked by a common philosophy.

Morris: And the Short-Doyle legislation that established a county community mental health services program was passed in 1958.

Nathan: Correct. And I became concerned then about the future of the private child-guidance clinic. How were we going to fit into a county or state system? A group of us interested in the contracting provisions of the Short-Doyle program organized to

persuade Dr. [Ellis] Sox, director of health [for the City and County of San Francisco] to contract with Mt. Zion, Children's Hospital, and St. Mary's [Hospital] for outpatient clinical work. Shirley Cooper from St. Mary's, who was the sister of Dr. Sox, and I were able to negotiate the contracts through Short-Doyle. It was the first use of the contract provision in the law.

Morris: And Dr. Sox bought that idea?

Nathan: Right. And that really established a contracting principle that continues today.

I think the major concept was that the city would contract with private services, rather than establish its own service, unless there was a need, unless there was gap in the service. I don't think it's too relevant to go into San Francisco's mental-health problems. I did begin to see the importance of political involvement and recognized the importance of cities and counties in delivery of all kinds of services.

Morris: At one point there's a note that you were active in a citizen's committee for the Short Doyle Act--

Nathan: That came eight years later. That was an appointment by Governor [Ronald] Reagan.

Morris: Then we'll talk about that later.

Contra Costa County Mental Health Service, A New Adventure

Nathan: I left the Child Guidance Clinic shortly after the contracting principle had been established. At Children's Hospital, I'd been part of the training of Delbert Wilcox, a psychiatrist who worked on contract for Contra Costa County. Contra Costa was going to establish a formal mental-health service. Del phoned and asked if I would be interested in organizing and coordinating the service. I decided then that working for a county would come closer to the social purpose I had cared about in the first place.

Morris: In running the agency--

Nathan: That's part of it. I accepted--well, I didn't accept the job, because there was an open competition; but I was a known quantity and knew a good many of the psychiatrists who worked within the program.

There were no psychologists. There were no social workers. There was just a spindle and a list of people who had phoned in for service. The psychiatrists would take the names off the spindle. That was their service, plus an inpatient ward. The hospital director, George Degnan, wanted to hire me on contract, but I felt there was no security in that and asked that the position be made civil service.

That annoyed George Degnan, who always referred to our service as "sick-iatry," which pretty well expressed his feeling about the whole venture. We fought it out. The psychiatrists wanted me to come there. I wanted some security for my family. So it eventually became a civil-service job with an open competition and interviews.

I felt somewhat secure because I had been talking with all of the psychiatrists about the program and helped to develop the concepts. It was a little odd to be interviewed by a civil service panel who didn't know as much about the program as I did. I think, in a way, I should have been a little more restrained. I think I annoyed the panel with my knowledge of the program and the way it should be organized.

Morris: An awkward situation.

Nathan: Yes, but they did hire me. That was a very broadening experience. It involved not only setting up psychiatric clinics in three parts of the county, but consulting with public-health nurses, social workers, probation officers, school teachers, and a variety of other professionals about their work. I had quite a bit of leeway to be creative. Even though I didn't know much about groups, I was organizing countywide therapy groups.

Morris: There was no group training in the School of Social Welfare?

Nathan: I had taken a couple of courses on group dynamics, but that's not exactly the same as working with steelworkers who weren't fluent in English or who were feeling guilty about having left their families in Mexico to work in the steel mills. We were all learning at the same time. It was when groups weren't seen as the treatment of choice. Groups were seen as a way of reaching more people more economically. We were also exploring the implementation of therapeutic communities--client-influenced wards in inpatient settings.

Morris: But there's two senses of group here: there's group in the sense of therapy with a group of people maybe coping with similar problems; and then there's group in the sense of working with organized groups.

- Nathan: Well, we were all learning together, at all levels, at the same time. I was working with two or three groups of patients. I had organized a countywide group of all people working with groups. We were a support group for each other, talking about how little we knew about what we were doing and finding ways we could help each other.
- Morris: Which would mean you were also working with groups in the sense of the probation department and the police department?
- Nathan: Right. And also consulting with them individually. It was a real three-ring circus. Contra Costa's a large county, and I had offices in three communities.
- Morris: Contra Costa has always seemed to me interesting because it's diverse. It's got some urban, and very suburban, and some rural areas.
- Nathan: Needless to say, I didn't work much in the Lafayette-Orinda area, but I was in Richmond and Martinez, and Pittsburg, and Bethel Island. I think we had a very good service. I worked with a number of different psychiatrists. We hired a large staff of social workers. I was in charge of the social-work group and worked with psychologists. The program had part-time psychiatric directors, because the law required us to have a medical person as director. I developed very close working relationships with Dr. [Franz] Wasserman and with Dr. William Mayer, who followed Franz as director.

Statewide Citizens' Mental Health Advisory Committee, 1972-1978

- Morris: Was that the William Mayer who eventually went to be deputy director of the State Department of Mental Hygiene?
- Nathan: Oh, yes. Bud's the one who's responsible for my being appointed to the state Citizens Advisory Council to the Department of Mental Hygiene representing social work. I never would have been appointed if Mayer hadn't told Governor Reagan that he trusted me. Now after years of absence Bud is back as the director of mental health in California. Reagan had left the social-work slot on the committee open for two years. It would be hard to find a social worker who voted for Reagan. When Mayer took the state job, I knew him quite well. We were quite different people, but we managed to survive with each other--

Morris: Did you respect each other's professional judgment?

Nathan: Bud is very quick-thinking and very bright. Bud's reputation had come from writing papers on brainwashing in World War II. He had been one of these experts at analyzing how soldiers give up their beliefs to accommodate themselves to other theories.

Morris: In a captive situation--

Nathan: Yes, in a captive situation.

Morris: What was he doing in a public agency?

Nathan: Bud has many interests, and being the director of community mental-health in Martinez was one of them. We were both trying to run a good program.

Mayer finally took the dust off the committee nomination up at Sacramento, saying that I wasn't going to endanger the whole committee if Reagan appointed me. Reagan finally did appoint me to that state committee. That put me in a different role in relation to mental-health programs, because the committee was generally critical of the existing community mental-health programs. It's so easy to be critical when you're not doing the job yourself. I don't think we were fully appreciative of the struggles in many counties.

Morris: How did this relate to the statewide Conference of Local Mental Health Directors?

Nathan: The chair of the Citizen's Advisory Council was invited to all of the meetings of the Conference of Local Mental Health Directors and would make presentations.

Morris: Of which you were also a member?

Nathan: No, I was not a member of the conference. I was not the director. I was the coordinator of services. By the time my appointment came through, I had left Contra Costa County, and was working at the School of Social Welfare at Berkeley. I served on that Citizen's Advisory Council for about six years and was the chairperson of the council for two years.

I felt very good about being the chair of the council because I was the first social worker elected chair. The prior chairperson was Leila Berman. As a volunteer, Leila had established the San Fernando Valley Child Guidance Clinic.

Morris: By this time you were thoroughly involved in all the different levels of county functioning. Were you yet in touch with foundation people or volunteer--

Nathan: I wouldn't have known a foundation existed. I had nothing to do with foundations and didn't even know if--

Morris: --Or private philanthropy?

Nathan: Private philanthropy meant zero to me, absolutely nothing, at least in terms of county programs.

Morris: But you were skilled in the fundraising devices known to the public sector--the budget process and--

Nathan: Yes, I knew the budget process, I knew a lot about working with people, I knew a lot about pulling together the different forces in the community, and I knew about the private sector's role. By then it was sixteen years since I had worked at the Jewish Welfare Federation. I didn't see that experience as philanthropy--that was a life and death struggle. I don't really identify with the field of philanthropy as a profession or as a field of practice. I'm much more identified with project development, problem solving, social-policy issues, and legislative process. I have some difficulty identifying with the world of ease that I associate with philanthropy.

So I really had no experience with foundations. I did have experience with the National Institute of Mental Health because I prepared the grant requests for the School of Social Welfare to NIMH.

Morris: For additional funding?

Nathan: Helping the schools and counties to secure a grant. I've always known what it means to have to ask somebody for something, whether it's help or whether it's funds. It's never been difficult for me to understand how awkward somebody else feels who needs to ask for something. None of us do that very well.

But as far as the role of foundations in society, I have to say that I have only learned that since being affiliated with the Zellerbach Family Fund. I don't think I appreciated the opportunities in the foundation field when I worked for Contra Costa County.

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Morris: Were you involved in raising grant funds at Children's Hospital?

Nathan: We raised funds for office furniture and the library but not for programs. We designed innovative programs, but it was a collaborative program with the courts. It didn't require any extra money from anyone. It required cooperation and understanding and a lot of extra work.. We did it within our own resources. In Contra Costa County, the program was county-funded. We were just too busy running a program to go out looking for money. It was a tremendous job to organize a mental-health service in a county that didn't have one; it was so needy in terms of professional resources that it would never come to mind to hustle around looking for funds.

Reducing Waiting Lists in Contra Costa County: An Interdisciplinary Team Approach

Morris: And you had enough money to do it--

Nathan: Yes. Even if we didn't, we were all working so hard that grant-seeking didn't seem to be the solution. The issue seemed to be: how do we organize our service so that people who were hurting were not put on a waiting list.

That was a good experience for me that did help me prepare for foundations. George Degnan, with all of his distrust of mental-health, was an excellent administrator. At that time it was very common for mental-health services to have what were called waiting lists--people waiting for three months to get an appointment. That really troubled George, and he came to me and to Franz Wasserman one morning and said, "I want that waiting list gone in two weeks. I think it's intolerable, and it's up to you to change it. And if you don't change it, I'll find somebody else who can."

Morris: Very positive.

Nathan: George didn't appreciate how overwhelmed we were. We were also following our training of offering long-term intensive therapy. We needed to change.

Morris: Was he thinking of the parallel with--that you've got a waiting list of people who say that they've got measles, or spots and a fever?

Nathan: Yes. He saw mental illness as an illness. George was ahead of his time. I mean, we were all psychotherapists seeing most of the

difficulties coming from interpersonal relationships. George was seeing mental illness as an acute medical problem.

I think we began to think of creative solutions to problems because we knew we couldn't go to George and get twelve more staff people. We organized a team. Franz Wasserman and I decided we would go through the waiting list ourselves. I would see a patient, and he'd see the same patient directly following. We'd meet together and we would decide on a plan right away. The patient was included in the planning. We formed a number of teams to get through that list, to work out temporary kinds of solutions for the families.

I learned that I was very good on the dynamics and planning, but I missed the medical aspects of a person's illness. Franz was very good on the medical aspects. I could see the patients' strengths. Franz the complications. We functioned very well. We established additional teams linking social workers and psychiatrists. No one had to wait after that. When people phoned in, they would be seen within the week. And we caught up.

Morris: And a temporary solution--

Nathan: A plan was worked out. At least we knew who was out there. We weren't leaving somebody out there in a critical situation. We hospitalized very few people. We didn't force people to behave in a way that they got themselves hospitalized to prove how ill they were. So I think in that way it was a humane system. It does challenge your ingenuity when you work in a small county, without the resources you need and you know that you're not going to have.

I was helping public-health nurses take on troubled families as their responsibility or helping social workers who weren't trained in counselling to try to become a friend to someone who needed a friend more than they needed a psychotherapist. I was putting a burden on other people, but at the same time it was making their job more interesting. It was taking them out of the paperwork part of their job and helping them gain a sense of competence. We also demonstrated that everyone didn't need to come to a mental-health clinic.

On the Staff of UC Social Welfare School: Doctoral vs. Clinical Training

Morris: And that there's more than one way to deal with a need in the community. How could you bear to leave that and go back to the stuffy old university campus?

Nathan: That's an interesting way of phrasing it. I just talked to somebody yesterday who was seeking a job in foundations. Everyone outside of the foundation field thinks it's wonderful, while some inside the foundation field say it's a terribly complicated place to work peripheral to real life and isn't all that much fun." Well, it's the same way with the university.

Many outside of a university endow the university with some sense of glamor, with some sense of Shangri-la. A great opportunity to help young people develop careers. So I saw only the positive side of the university and really didn't recognize the limitations of university life. I certainly didn't appreciate the class difference between clinicians and tenured faculty.

Morris: That's interesting, because for a while in there--where are we now? We're in the late sixties--

Nathan: Yes, we'll look at the little chart.¹ Right, we're in the late sixties, and the early seventies [1966-1972].

Morris: At that point the School of Social Welfare was beginning to have some image problems. Were those obvious within the school?

Nathan: I was in charge of fieldwork, taught advanced method, and then later helped to develop a new mental-health curriculum with Lydia Rapaport. Lydia was a wonderful teacher and friend. The school had problems in that those teachers who were most popular, who were most relevant to society, were the clinicians and not the tenured faculty. Those of us who did not see ourselves as academicians, were, in effect, giving direction to the school. But the power was in the hands of the tenured faculty.

At some point, the tenured faculty became very threatened by this schism within the school. Their anxiety was heightened by student interests. Some of the tenured faculty had a hard time recruiting students for their classes because they didn't fit into the new curriculum that Lydia and I had created.

¹See p.96 for vita.

Morris: There was also, even more generally than the School of Social Welfare, the kind of rumor, and probably more specific than that, that the university was not in the business of preparing people to go out and do specific jobs; that they were there to do research.

Nathan: That's true. The doctoral programs were just gaining importance at the School of Social Welfare, and the school itself felt under pressure to strengthen the research aspect of education. It was also at a time when there were diminishing resources from the federal government for scholarships and stipends. Part of my job had been to write the grant requests to the National Institute of Mental Health--the federal government--for stipends, and to define our program. So I didn't find teaching unrelated to the community, because my job was to keep in touch with social agencies all over the Bay Area, to consult with those agencies, and to follow the students. I liked that job and it set up a network of a kind that is still valuable today.

Lydia and I did create a problem for the school because we developed a curriculum that most students wanted to be in. That skewed the school's application process and the teacher-assignment process. Following our lead, other new curriculum groups organized. Judy Wallerstein and Kermit Wiltse took the leadership in organizing a family and child welfare curriculum. These curriculum divisions continue twenty-four years later.

We had no leadership from Milton Chernin, dean of the school. Milton had been there at UC some thirty years. He was essentially a political scientist, whose career had been devoted towards university politics. He was an important person in relation to the university but not in relation to social work.

The struggle within the school became very unpleasant. I became the designated leader of the clinical, non-tenured faculty, representing a point of view to university committees and to the chancellor. It was a losing battle. I spent most of my time trying to help my non-tenured colleagues get jobs.

VI JOINING THE ZELLERBACH FAMILY FUND, 1972

Starting Part-Time; Hanging in with Harold Zellerbach

Nathan: It was at that time that Bill [William J.] Zellerbach, a friend from childhood, approached me about foundation work. Actually it was slightly before, when life was a little less hectic at the university. Bill talked with me at a Big Game party about working for the Zellerbach Family Fund. He asked if I would be interested in applying. I can remember saying, "I am very happy where I am. I like students, and I like teaching." I didn't act on the invitation.

Harriet, who was very familiar with university life, suggested that at least I should talk with Bill. So I did call back about two months later and asked if the opportunity was still open. I met with Bill and with Harold [Zellerbach, Bill's father,]. Bill had a vision and a wish to be constructive and innovative in the community. Harold had great respect for his parents' memory and had pride in the family name. It was an exciting opportunity and we agreed that I could begin at 10 percent time.

Morris: About four hours a week?

Nathan: Yes. That seemed about right. Then I negotiated with Chernin to take the 10 per cent time off the university, and he could reduce my salary. That was one of the real fights I had with Chernin. He said that I would spoil the whole system if I took a salary cut, that all of them received extra funds for consulting, that he knew I worked outside and all that.

Morris: But I thought consulting fees were in addition to one's university salary.

Nathan: Yes, they are. I just understood if you have one job and you take on another one, that something is going to lose in that process.

Just a logical sense that you can't be two places at one time. That's not the way the university worked then.

Morris: They figured that if you were doing a consulting job, you should take a cut in your university salary?

Nathan: No, I'm the one that suggested I should take the cut. The dean's the one who thought I shouldn't take the cut. Eventually I took a cut. But it was after I had increased my foundation time to 15 or 20 percent time. I found I was able to propose grants on very limited time--it's the decision-making part of foundation work. I didn't have to make many site visits. I was already pretty familiar with the nature of most work and organizations in mental-health, child welfare, and to some extent education.

At that time Harold Zellerbach was the president, and he was very interested in neighborhood-art programs and major cultural institutions.¹ Bill Zellerbach had, early in his career, been interested in more human-service activities--Hunter's Point Boy's Club--and felt that the foundation should have more balance in its grantmaking.² Bill, or possibly his father, had employed a consulting firm--Heald, Hobson. They suggested that a small foundation could have a very specific role in the community, but they needed to define that role and they needed a particular kind of executive with a particular humanitarian background.³ I was a fairly good fit. I was also a good balance between Harold, who knew me as a child and liked me, and Bill, who wanted to have more adventure in the foundation field. I was able to be respectful of Harold.

Morris: And adventures with Bill?

Nathan: Well, Harold had a great sense of adventure, too. It's just, his life had led him into the artistic field. He wasn't as close to the human-service field. But Harold was a person with great flair and personal honesty, very down to earth, and very tough. Before I accepted the job I did consult with Dan Koshland, who asked if I was tough enough to cope with Harold.

¹See Harold Lionel Zellerbach, Art, Business, and Public Life in San Francisco, Regional Oral History Office, University of California, Berkeley, 1978.

²See Bill Zellerbach's oral history in this volume.

³"Zellerbach Family Foundation, Review and Recommendations," Heald, Hobson and Associates, Incorporated, New York, 1968. Copy with supporting documents in The Bancroft Library.

I don't know that too many people see my determined side. Being a therapist really prepares you to deal with a variety of different kinds of assaults without feeling too personally involved. Harold never assaulted me, but when he didn't like something, he just didn't mince words. If you were going to succeed with him, you needed to take a deep breath and come slugging back. That would seem to reassure him that you really cared and that you really believed in what you were doing.

Morris: You had to defend something--

Nathan: You had to defend, but you'd have to get yourself revved up to defend in the same language that he used. That's never been a problem for me, to come back that way.

Morris: Did he address the issue of whether or not to hire you in the same kind of terms, that you had to defend why you should be hired?

Nathan: Not really. He just said, "Well, I've known you since you were a kid. I've always liked you. I just want you to let me do what I want to do here, and not get in my way." So we kind of divided the empire. I mean, of course, I wasn't dividing anything. There's the whole board of trustees who had a different view. But Harold had at that time a very narrow group of trustees--narrow in terms of their interests and their experience. It was only Bill--well, that's maybe not totally fair, because Philip Ehrlich, Sr., and Louis Saroni were members of the board as well. Louis has been a lifelong friend. We used to play kick-the-can in front of his home. Louis is a good listener and gets involved in board discussions when he has strong feelings. Bill is, of course, far different than his father. There's not the kind of personal challenge with Bill. There's an intellectual challenge, and there's a "could we do more," and there's more support. Bill also has ideas about program areas to pursue. So they're really quite different kinds of personalities.

Morris: That's interesting to hear that it was Bill Zellerbach, rather than his father, who approached you about joining the foundation. Was that a way of his father beginning to turn things over to his son?

Nathan: Harold felt very much in charge. I think Harold most likely wanted Bill to feel good about his involvement with the Family Fund. There is a great sense of family pride, and of passing the baton on to the family. Bill has that same attitude towards his children. There was just a difference of values between the father and the son. It isn't uncommon, where there's a strong

father who's devoted to opera and symphony and city hall, that the son turns to another area of interest.

Introducing New Human-Service Ideas

Morris: Well, it seems quite sensible as a way of self-preservation for all concerned. You mentioned before that it was kind of a transitional period, that you really didn't know whether it was something--

Nathan: That I really wanted to do. How much time I wanted to put in on foundation work. So I drew on the resources, in the beginning, that I knew quite well. I shared offices briefly at Cal with Barbara Thompson, an African-American woman who helped me to confront my own racism. Barbara enabled the Family Fund to help establish Watoto Weusi, a child-care center for black children in San Francisco. We also gave support to the black women's unit at the YWCA at the University of California. Judy Wallerstein was a colleague and wanted to develop her research on children of divorce. So I was able to bring the foundation some ideas that were a part of my life, that were also extremely important in society. Of course, you can't do that forever, because you just run out of good ideas from the people you work with. It was a beginning and a good introduction to the foundation field.

I just kept adding foundation time. The School of Social Welfare became more and more strained from my point of view. I found that I could carry out the social agenda that I believe in much better in a more welcoming, open environment. There were conflicts--I felt very important to the students and they were important to me. That's why a lot of people stay. I did serve an important role for many hundred students and still keep in touch. That's a helpful network.

Morris: That's what I was wondering: if you'd stayed in touch with those folks.

Nathan: Yes, I've kept in touch with many former students and agency and university fieldwork supervisors. When I was at the university, they were just starting the Center for Independent Living. One of my students was paraplegic and was placed at Herrick Hospital. He introduced me to his friends and showed me the capacities and needs of the disabled. He convinced me of the need to start CIL. I didn't start it; they started it. Zellerbach Family Fund was an initiating funder and has continued support.

Morris: That wasn't Ed Roberts by any chance?

Nathan: No, I knew Ed. He had been hospitalized out at Martinez. I can't think of this person's name. The network still exists; I know many former students who have come into leadership roles in the community.

Morris: Because of their training at the UC School of Social Welfare or because of their innate competence?

Nathan: Well, I like to think it's a little bit of both. I think the school under Harry Specht's leadership is trying to become more relevant to society than it was before. Harry and I are close friends and a good team. Most students are competent and bring special talents. The school needs to bring inspiration and a sense of public missions.

Morris: There's another name I'd like to ask you about here: Henrik Blum. He had been in Contra Costa, too, hadn't he?

Nathan: Henrik and I worked together on many, many occasions. We were spiritual and conceptual brothers, but we had George Degnan's political power and medical priorities to contend with.

Morris: The legend I've heard is that Blum became head of the Cal student health services, and said, we can make space available at Cowell Hospital for the students with disabilities so they can live on campus--

Nathan: That might have been. Henrik is one of the most creative people that I've met. He's bold in the field. In fact, I just saw him two weeks ago at the faculty club. He's a professor emeritus. I gave him a document to read and critique that we're working on here at the Zellerbach Family Fund: a neighborhood-based, family-centered, service-system concept. In 1965, Henrik had set up a multi-purpose service center in Rodeo. He brought together public health, mental health, probation and social service. It worked quite well as a demonstration project in Rodeo, which is a small community in Contra Costa County. We didn't actually pool funds. We out-stationed people there.

Morris: This is while you were a student?

Nathan: No, it's when I worked for Contra Costa County, and Henrik was the director of public health for Contra Costa County. He later became the dean of the School of Public Health at Berkeley. He promoted the same ideas of multi-purpose workers and multi-function agencies.

Morris: And at one point, he was going to make respite services available for people with handicapped children.

Nathan: We had a children's ward at the hospital in Martinez where foster parents and parents of disabled children could bring children in for respite. Henrik has always been ahead of his time.

Morris: How did he and Dr. Degnan get along?

Nathan: Not very well. They competed for the director of health position in the county. George won out, even though Henry was more visionary.

Morris: Right, that was what I was trying to clarify in the relationship.

Nathan: Degnan understood the politics. He had grown up in Contra Costa County, he was close to [State Senator] George Miller [Jr.], and he was a buddy of the board of supervisors. Henrik was too intellectual. He most likely would get upset with this kind of infighting. I know he didn't win out. Counties often change their organizational structure. It's not often that they change the quality of service.

But Henrik was too radical in his beliefs. I had been asked to organize a program for the Northern California Psychiatric Association about the relationship between psychiatry, social work, and public-health. I asked Henrik to join me. The two of us presented some concepts about multi-purpose workers who could do some of the work of psychiatrists, social workers, public health nurses, and probation officers. We talked about a generalist who was out there helping in the community. Paul Homer, a psychiatrist who was a director of Northern California Psychiatric, came up to me said that he wanted to compliment me, that we had set back the relations between psychiatry and social work and health at least six years, and we'd done it all in a half an hour.

Morris: The probation and social work is an interesting combination-- logical, but you'd think it would make the psychiatrist unhappy.

Nathan: In those days, psychiatrists would be most unhappy with anyone who would challenge their role or authority. It's not the ongoing--

Morris: Putting M.D.'s, and M.S.W.'s in the same basket--

Nathan: Yes, that's really not the way it should be from some psychiatrists' perspective.

VII COMMUNITY ARTS DISTRIBUTION COMMITTEE, 1975

[Interview 2, June 13, 1990]##

Building Trustee-Adviser Confidence

Morris: How did you come up with the original idea of the Community Arts Distribution Committee?¹

Nathan: It's not possible to talk about the Community Arts Distribution Committee without thinking of Harold Zellerbach. Harold was the president of the foundation when that started. He had a great interest in the arts, both the major cultural institutions as well as the neighborhood arts program in San Francisco. The Zellerbach Family Fund made grants to the major cultural institutions, including the first grants to what has become the Performing Arts Center, or Davies Hall.

Morris: For the actual construction?

Nathan: Planning first and construction later. Harold was devoted to the idea that there needed to be a performing arts center. He spent much of his later years in developing that concept. Some people say that his interest in neighborhood arts had a political motivation in that in order to establish a performing-arts center, you needed the support of a broad segment of the community. The neighborhood-arts people and all of the small community groups felt that they weren't getting their fair share of city funds. Because of that stance, the Zellerbach Family Fund, along with other foundations, learned of the needs of neighborhood arts groups and tried to give them support. The Zellerbach Family Fund made modest, small grants to community

¹See Comments on the CADC by Jan Mirikitani in appendix. See also "Perspective on Community Arts," Zellerbach Family Fund, 1985. Copy in supporting documents in The Bancroft Library.

arts groups and supported San Francisco's Neighborhood Arts Program.'

When I was hired, I really knew very little about community arts, except as someone who would attend theater occasionally or a dance performance. Coming from a social-work background, it seemed like a good idea to involve the people whose lives were affected. I suggested to the trustees that our granting could be improved if we had an advisory committee in the arts to give guidance, not one that made the grant decisions.

Our board held a number of special meetings to decide if they wanted to work in this way. It isn't common for foundations to organize advisory committees--even those who don't have funding authority.

Morris: Did any of the trustees see it as a matter of letting go of some of their authority?

Nathan: The trustees realized that you needed to follow the guidance of an advisory committee for it to be successful. They saw that very early on. They saw that as a positive way to organize. The trustees were ready, as they have always been ready, to accept new ideas.

Morris: Was Harold Zellerbach still on the committee then?

Nathan: Yes. Harold was the president of the Zellerbach Family Fund and he was the president of the San Francisco Art Commission. I would say he was by far the leading person in the development of the Performing Arts Center. He worked very closely with the city and county and with the National Endowment of the Arts. He enjoyed that kind of political involvement, but he was also dedicated to the community-arts concept. People never fully appreciated Harold's dedication to the neighborhood arts programs. He was a person who liked the artist more than the formality of the structure.

Morris: That's interesting. He enjoyed knowing the people who did the painting and made the music, as well as the results?

Nathan: Yes. In his oral history, I'm sure that he talked about his personal sponsorship of artists. He enjoyed that. He was a man of the people. Formation of the Community Arts Advisory Committee gave all of our board an opportunity to know gifted

'See San Francisco Neighborhood Arts Program, Regional Oral History Office, University of California, 1978.

people from diverse cultures in a personal way that they never would have known in any other way.

CADC Members

Nathan: The problem for me was, how do I get this idea off the ground, and whom do I invite to serve on the committee. Stephen Goldstine, who at that time was the director of the city's neighborhood-arts program,¹ served as my consultant. I was concerned that the forty-thousand dollars that we were going to allocate for community arts would not be seen as enough money to make any difference to anyone.

Morris: Had you hoped for a larger sum?

Nathan: No, forty-thousand dollars was what seemed like a fair share of what we were allocating at the time. In the early seventies, and with inflation and all, forty thousand was a sizable amount of money. To divide that amount of money over twenty small performing-arts groups or neighborhood arts programs might not have seemed very important in terms of the amount of money that went to the opera, the symphony, and ballet.

Steve didn't feel that way. He felt small grants would be important. He suggested that I first talk with Roberto Vargas, who was a community organizer and an artist, and who had very good ties to Mission District activities and to the Latino-Hispanic community. Roberto was very enthusiastic about serving on the committee. He said that he would be glad to help me. Being a political person, he said he would be glad to help me appoint the other people. I thought the best way to proceed was to find two members of the committee and then have the committee agree upon the other two members, so in that way I wasn't just choosing four people out of Steve's acquaintances.

As I remember, I also approached Margaret Jenkins, whose dance company has come into prominence now.

Morris: Had you had some contact with her or just admired her?

Nathan: We had made grants to the Margaret Jenkins Dance Company, and Margy was someone who was respected in the community.

¹See interview with Goldstine in San Francisco Neighborhood Arts Program, *ibid.*

Morris: A traditional kind of an artist?

Nathan: A creative choreographer and dancer with some knowledge of the dance community and with ties in the community that went beyond dance.

Then with committee approval, I approached Lonny Ding, who's someone I've always admired. Lonny was active in the Neighborhood Arts Program at the time. Her reaction is one that I've experienced a number of times since. Lonny did not want her name affiliated with foundations--the wealthiest group in society. She thought that affiliation would place some limit on her freedom of choice and action, as far as standing up for her beliefs.

This has been a common experience with people who have been approached to serve on the committee. They often feel that they're going to be co-opted. That they won't have the final say. From the foundation side, we needed to prove as we went along that we really meant to honor their recommendations.

In the beginning, because we were insecure, the trustees did reserve the right to overrule a recommendation of the advisory committee. That never happened. After three years of experience, the board, on its own initiative, not on my recommendation, changed the committee title from Community Arts Advisory Committee to the Community Arts Distribution Committee, which meant that there was trust of committee decisions from the board's side. We still go through the formality of having our trustees approve all CADC grants in order to keep on the right side of the law because they are technically not trustees. They function as though they were trustees. That trust has developed over a matter of these many years.

The committee has been relatively constant over the years, although there have been changes of personnel since the first members.

Morris: So you're saying Lonny Ding did not come on the committee?

Nathan: Lonny Ding did not accept the invitation. Lonny and I are good at meeting each other, understanding each other, crying together, but never being able to work out an area for her to participate with the Family Fund. We've both changed a lot. Lonny's a successful filmmaker and has her own life to lead.

What happened in the beginning then was very interesting. Margy and Roberto knew that we needed to look beyond Lonny. That's when Roberto, on his own and without any consultation with me or Margy, invited Jan Mirikitani to serve on the committee.

So my first meeting with Jan was after Roberto had appointed her. I didn't know Jan and wasn't certain whether this would work out or not. Was I going to need to dis-invite her, or did I need to confirm? It was an interesting spot for her, and it was an interesting spot for me. Roberto had acted without any group approval. Jan, in her usual tactful and sensitive way, understood the situation and established herself very quickly as a person of great depth with the good of the community in mind. It became easy to accept Roberto's judgment.

Morris: It seemed to me, with what little I know about her role at the Glide Foundation, that she has her own rather remarkable network of people in the community, not only the arts community, but social welfare as well.

Nathan: Yes, that's true. Jan's presence on the committee has enabled us to support small-press activities, as well as some of the work of poets in the schools and other interests that she has in her life.

Roberto no longer serves on the committee. Margy Jenkins no longer serves. There was a musician who served briefly. It's difficult for musicians to be a member of a committee that has a stated meeting date. There have been maybe three or four people who served and who have moved on with their careers. Most recently, John Santos, who is a percussionist and a teacher, replaced Alphonso Maciel, who served for many years. Alphonso was involved with neighborhood arts and was a muralist and poster-producer. He knew the community very well. And Lester Jones, who is an actor, has served almost from the beginning. Lester knows the theater community very well.

Brenda Way of ODC [Oberlin Dance Collective] replaced Margy Jenkins as the member most informed about dance. Brenda brings the concept of excellence and the importance of professional development to the CADC. She is creative, has a sense of humor and great sensitivity.

We've been able over the years to form a very good working coalition. There are often strong differences in perspective between members of the committee. It's fascinating to observe the committee work towards compromise. The CADC members respect each others' opinions.

Collaborative Grantmaking

Morris: It sounds like they're all people who have lived and worked in San Francisco for some years.

Nathan: They are all established in San Francisco. There's quite an age range and quite a range of experience on boards and in community activities. I think the committee serves both to educate each other as well as to educate me and Linda and Susan Silk and Tom Layton.

The administration of Community Arts has changed dramatically since Linda Howe has been a part of the group. It's also changed in terms of its community recognition. At one time John Kreidler of the San Francisco Foundation used to sit in on the meetings of the Community Arts Distribution Committee. John was a valuable resource. I don't think the committee has been as useful to John since the San Francisco Foundation has tended to move more towards intermediate arts: companies that are larger than the small companies that the Community Arts Distribution Committee supports. I would say we are, along maybe with Fleishhacker, one of the major funders of small, grassroots, developing community arts groups in the city.

The Columbia Foundation, under the leadership of Susan Silk; and the Gerbode Foundation, under the leadership of Tom Layton; and Myra Chow of the Levi Strauss Foundation use the Community Arts group to guide them in their community arts grants. Tom and Susan are regular attendees at the dinner meetings of the CADC. They enjoy the relationships and the good times as much as the guidance.

Morris: How did they come to be part of CADC?

Nathan: They are interested in the arts, and they came to some of the same conclusions that I did, that it's not possible to really be informed or to attend all of the performances of these groups or to make fair decisions on the basis of a single program officer's experience.

Morris: Or a single proposal coming in.

Nathan: Right. I would be overwhelmed. I do read the requests through, but I wouldn't be able to make consistently good judgments about what's important or creative on the basis of the material that's submitted. And I wouldn't have the time to make site visits or to attend all of the performances. The Bay Area is a very active arts community. I think it's almost a necessity in the arts field to involve knowledgeable people in the decisionmaking.

- Morris: Does John Kreidler maintain contact with your CA Distribution Committee as a member of the San Francisco Foundation staff or just as an individual?
- Nathan: John plays a crucial role in the San Francisco Foundation. He's known as the arts funder; his knowledge of organization and management is profound, and his rational approach to life has been very useful to that foundation. I very much admire John. He is not involved with the CADC.
- Morris: Was it when Ira Hirschfield was at the Levi Strauss Foundation that they became interested in the Arts Distribution Committee as a resource?
- Nathan: We'd have to check with Linda to see when their participation began. Levi Strauss is a foundation that wants to be responsive to the interests of their employees and the community. The grants that the committee makes on behalf of Levi Strauss are generally to multicultural ethnic groups in the arts. The committee is very sensitive to the interests of Levi Strauss in the same way that they are to the interests of the Gerbode Foundation and Columbia.

It has turned out that the CADC has a substantial amount of money to allocate. The Zellerbach Family Fund allocates \$250,000 now to the Community Arts Distribution Committee, and Gerbode allocates \$50,000. Columbia accepts \$50,000 in recommendations and makes their own grants. Levi Strauss awards \$15,000 to the committee. When you add all of that up, it's about \$365,000, which is the total granting authority of many small foundations.

- Morris: Does the Fleishhacker Foundation participate in this process, or do they do their own?
- Nathan: They do their own granting. I don't think there is any communication except through Linda, who is our arts administrator.

Being the arts administrator here means that there is a lot of work. Linda is in direct touch with all of the applicants who bring their grant requests to us. We try to be informal, we try to know the people who are being funded, and Linda is the communication link to them.

The members of the Community Arts Distribution Committee are sometimes available as consultants to persons who are applying. There isn't a lot of distance or formality between grantseekers and the foundation and the Community Arts Distribution Committee.

That's true of our behavior with all grantseekers. We don't screen phone calls from anyone.

Artistic Innovations and Opportunities

Morris: To what extent has the committee's expertise and interest developed so that they are actually shaping some of the proposals that are coming in, or suggesting to the arts community that it might be interesting to try this or that activity?

Nathan: There's always the problem of conflict of interest and inside track. It's true of foundations no matter where. There's currently great emphasis on ethics in the foundation field. When you ask that question, that's the first thing that comes to my mind. But I think that the CADC is an influence as individuals because each person on that committee has a strong commitment to the field. I wouldn't know if they shaped policy. I know they're a force in terms of who performs and the opportunities that are given to performers. They have a very clear sense of values in terms of how their grants are made. I think the guidance is more informal with certainly a heavy emphasis on professional development, multicultural groups, and with some bias towards music that comes from the different cultural groups, rather than chamber music or music that is closer to symphony, opera, standard ballet.

I think that the experiments that are going on in theater and in dance and in music influence the larger picture in San Francisco, and often produce national artists, people with national reputations, whose starts were given by this Community Arts Distribution Committee. I value the close relationships with the CADC members but don't consider myself an important part of the decisionmaking process.

Morris: You just kind of let it do its own thing?

Nathan: I go to all the meetings because I am very fond of all the members and I like the excitement. I am a moderating force at times, trying to help things move, but they don't really need me.

VIII WORKING WITH PUBLIC AND PRIVATE AGENCIES, OTHER FUNDERS

San Francisco Hotel Tax Fund

Morris: How about interaction of the small arts organizations Zellerbach funds with or rivalry with the "big arts," as in the opera and the symphony?

Nathan: They are worlds apart. I think people have strong feelings about what's important in the city, and for many of them it is the newer, smaller art groups and activities related to the different cultures we have in the Bay Area.

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Nathan: There are a number of foundations, including ours, that give modest supporting grants to the major institutions and museums. The competition gets expressed more through the Hotel Tax Fund of the city. Actually, Jan Mirikitani, Tom Layton, Susan Silk and I have served on that committee. Our attempt there, working with the chief administrative officer of the city, was to broaden the funding vision of that organization so that they would see that community arts are an important part of the art experience in San Francisco. Community arts create an environment that tourists would want to experience. Community arts preserve culture and enrich life in neighborhoods.

Morris: Is the Hotel Tax Advisory Committee the kind of advisory group that doesn't have final say--it's the board of supervisors that determines how those monies will be allocated?

Nathan: I don't know of any recommendations that haven't been followed. I think changing recommendations was within the province of the chief administrative officer. This was Roger Boas. Rudy Nothenberg is also an arts advocate. He is the CAO now.

Morris: Well, he definitely is a major player in San Francisco public affairs. He sort of moves from spot to spot.

Nathan: I was a member of the first Hotel Tax Advisory Committee with Leslie Luttgens,¹ Norman Lew, Jackie Goosby and Tom Layton. We were able to increase grants for the Chinese Culture Foundation, the neighborhood arts programs, the various cultural centers in the city, various parades and cultural events. I think the struggle for Fair Share continues. There has been progress in terms of more adequate support for community-based institutions compared to the major cultural institutions.

Our committee did initiate the idea of the Ethnic Dance Festival. We had more requests than we could fund. I suggested that we might help these groups gain recognition and visibility if they could perform in a dance festival. The committee refined the concept and the Neighborhood Arts Program arranged the implementation. The idea took hold but it was a lot of work. We thought that community relations would be improved if we could have groups perform in different neighborhoods.

Committee for Southeast Asian Refugees, 1975

Morris: How about the Refugee Committee? I came across a speech that you made in 1985 speaking about ten years of Southeast Asian refugees in the United States.² I wondered if the Zellerbach Family Fund involvement goes back to '75?

Nathan: Yes. The Zellerbach Family Fund involvement goes back to '75. I think the Refugee Task Force might have been the first collaborative effort of foundations in the Bay Area, or one of the first efforts that followed our involvement. That Refugee Task Force set the precedent for many of the task forces that now exist. The Task Force was not an official part of the Foundations Group but did involve eight to ten foundations.

¹See Leslie Luttgens, Organizational Aspects of Philanthropy: San Francisco Bay Area, 1948-1988, Regional Oral History Office, University of California, Berkeley, 1990, pp. 53-59,68.

²"An Agenda to Survive Hard Times," Edward Nathan, National Conference Southeast Asian Refugees in the United States, The First Decade 1975-1985, November 22, 1985. Copy in supporting documents in The Bancroft Library.

Our involvement as a foundation in refugee resettlement began in early '75 when I became aware of how disappointed the Asian community in San Francisco was in the response of California and the federal government to the needs of Southeast Asian refugees. That awareness came at a meeting of the Council for Civic Unity to honor Ruth Asawa. A representative of the state of California was to be present to make this presentation. At that meeting Henry Der of Chinese for Affirmative Action and Harold Yee of Asian, Inc. turned the meeting into a protest to the state for their negligence in responding to the resettlement effort.

Following that meeting, I called Henry and Harold to say that I had not been aware of their strong feelings about this, and was there anything that a foundation could do to be of help in refugee resettlement? They had already been thinking of some community response to the needs of refugees.

Morris: To what extent were people in the existing Chinese and other Asian communities involved in bringing the refugees in this country?

Nathan: I don't think there had been great personal involvement. Resettlement was a federally-funded and state-funded effort--

Morris: Political kind of a thing is my impression.

Nathan: Yes, it was making up to the Southeast Asians for what our country had, in effect, created for them in their own homeland. It was untenable for many refugees to stay in Southeast Asia because of the Communist takeover and power, and the devastation of their land. Our country had an obligation to them. The programs to take care of refugees once they were in the United States weren't in place.

Out of those meetings with Harold and Henry, we prepared a joint proposal to establish a center for Southeast Asian refugees in San Francisco that would begin to accept responsibility for resettlement and would at least establish an advocacy center for the needs of Southeast Asian refugees.

What was interesting about that early coalition was that we were able to frame it as a total Asian concern so that anyone who felt an affiliation with Asians, whether they were Japanese or Filipino, joined in this coalition to establish the center.

Morris: That must have produced some interesting compromises between some of the different Asian groups that had had their own friction.

Nathan: The competition for funds is real. But all Asian groups agreed that they were in the same boat. I know the Asians felt that the reception in the U.S. would have been different if the refugees had come from a European background. Those beginning efforts were quickly joined by the Van Loben Sels Foundation. Henry Izumizaki of the San Francisco Foundation also participated in the establishment of the Center for Southeast Asian Refugees.

A group of us began to meet to determine what we could do to be of some use to the resettlement effort. The group included Susan Silk of Columbia, Elisa Boone of Wells Fargo, and Norma Arlen of Atkinson. Caroline Tower at the Foundation Center Library made a meeting room available for our use. Also participating with us on the committee was Jo Fredricks of the State Department Office of Refugee Affairs. Sharon Fujii, who was in charge of refugee resettlement for Region IX of Health and Human Services also attended meetings. It was one of the first efforts that brought city, county, state, federal and foundation resources together. The purpose of the collaboration was to avoid duplication of efforts and to maximize the expenditures of the state and federal governments with the foundations' grants.

Northern California Grantmakers and Its Predecessors, 1975-1985

Morris: Was the Northern California Foundations Group involved? They were getting organized about then too.

Nathan: We were not sponsored by the Northern California Foundation Group.

Morris: I wanted to talk today about the marvelous process of developing a community information meeting about foundations that you were involved in.

Nathan: Some people might call that a fiasco rather than a wonderful process.

I think I was chairperson of the Northern California Foundations Group in 1976. Ruth Chance had preceded me in 1975. The organization's name has changed and there is a new sense of formality. But I suppose this might have been at the same time that the group was taking on a more formal status. At least we hadn't thought of using NCG as the vehicle to help us organize the task force.

Morris: Was the Refugee Task Force generally supported out of discretionary funds that foundation executives had, or was it things that they were then going to take back to their board?

Nathan: I've never wanted discretionary funds. I prefer to go to the trustees or the president for approval. That's true of most foundation executives. We would find a nonprofit group to develop the project ideas that came out of our meetings. We started a number of projects in this way. The Refugee Women's Project and the literary projects for refugees and some early housing-development efforts grew out of our task force. What was important about the effort was that we learned to work together. We enjoyed that experience. It was the least formal of the groups. Groups nowadays have a more formal structure. They're more accountable to the board of Northern California Grantmakers.

Morris: More rigid?

Nathan: I don't think so. I think that Northern California Grantmakers just want the assurance that they are being represented appropriately in the community. The group that's formed on its own still carries responsibility to its trustees, but doesn't have a superstructure to work through in terms of its actions. I think we acted as responsibly as the groups act today. It's just that as you have been around longer, you seem to need more assurance that everything is tidy.

Morris: Right. And that nobody is going to look over your shoulder.

Nathan: Northern California Grantmakers membership includes many diverse points of view, whereas those people who gather together to form a task force have lots in common. There are people in NCG who might never want to get involved in service to refugees or in the legalization of the undocumented. Therefore, you have to be consistent about the stands you take, the kind of advocacy you're involved with, and who it is you're speaking for. Most of what we do is modest and acceptable.

Morris: "We"--Northern California Grantmakers?

Nathan: Those of us who affiliate with task forces may believe that there need to be substantial political changes in order for the programs to succeed; a need for public statement. There are some grantmakers who feel a little bit uneasy about public recognition.

Morris: But that's part of the foundation community.

Nathan: Yes, so there's room for all of us to live together respectfully with some differences of opinion.

On Attorneys and Foundations

Morris: Was the Refugee Task Force the first time that you had worked with the Van Loben Sels Foundation?

Nathan: I've been a trustee of the Van Loben Sels Foundation for many years--must go back to the early seventies. Claude Hogan, who is the president, and Toni Rembe, the secretary-treasurer, and I are close friends, Toni and Claude are extremely sensitive and bright people. We use each other as a sounding board to talk about ideas. Toni and Claude have always been responsive and supportive.

Morris: Sounding boards on things like the need for this refugee task force?

Nathan: A refugee task force or for an emergency fund or for a committee on legalization of immigration. These are both busy, successful attorneys who have a social conscience. It's been a natural and rewarding alliance.

Morris: You provide them some outreach and contact with parts of the community they wouldn't otherwise necessarily know?

Nathan: You could say that, but it would be wrong to give the impression that I do the staff work for the Van Loben Sels Foundation.

Morris: No, that wasn't the intent. It was more trying to get at the fact that a lot of foundations do operate out of attorneys' offices.

Nathan: Right. Even if I weren't there, Claude and Toni would run their own show in far different way than many other foundations that are run out of attorneys' offices. They have cut out an area of interest that is special to them. Support of activities in the nonprofit legal support field, in the litigation area, and in support for programs outside of the Bay Area--small programs. They have built an area of interest that is unique.

Toni and Claude have been supportive of new ventures that I've helped to organize. In that way you may be correct that I bring something to them. Being a trustee of the Van Loben Sels Foundation has been a source of satisfaction and pleasure, as well as fun, for me.

Morris: Is there a subcommittee somewhere of attorneys in foundations?

Nathan: No. Well, we better not get into that. There isn't any subcommittee of attorneys. I think whenever attorneys are on committees they are an influence because they are usually clear, logical thinkers. I wouldn't say that attorneys as a group are any more influence in the foundation field than anyone else.

Morris: I remember John May telling me about the amount of time that he spent forty years ago educating attorneys about the role of foundations and the possibility of counselling clients that a foundation was a perfect thing to do with your assets.¹ He said most attorneys didn't really understand what was going on.

Nathan: That has not been a part of my life, but it would be a part of the life of a community foundation executive. John May and Bill Somerville and anyone else affiliated with the community foundation field want attorneys to influence wealthy individuals to leave an estate to a community foundation.

Morris: Why did you feel that this organizing effort of the Northern California Foundations Group was a fiasco? It looked like you had a huge group of foundation people willing to be available to meet with people in the community who cared about grantmaking.

Nathan: It wasn't exactly a fiasco, except there's never been another public meeting of that kind in the city. Most likely, there are reasons for that. I remember when the idea came to Melinda Marble and to me. We were at a meeting of the Council on Foundations in 1978, and we heard a report about a public meeting that had been held, I believe, in Minneapolis. It was a good public meeting, but it was very much controlled and attendance had been very much limited. I suggested to Melinda that the Northern California Foundations Group could do a better job than that, and so why didn't we organize a public meeting in San Francisco. We presented this idea to the participating grantmakers, as you see on this list here.²

Morris: There are several preliminary planning documents.³

¹John R. May, Building a Community Foundation, Regional Oral History Office, University of California, Berkeley, 1976.

²See sample next page.

³See folder "Northern California Foundations Group" in supporting documents in The Bancroft Library.

Nathan: The open meeting was scheduled at Fort Mason. It was such a popular notion that we ran out of space. We distributed free tickets, but there were groups who wanted to attend who couldn't get tickets. They felt that we hadn't done an equitable job of distribution. Either the Asian community or the Hispanic community was under-represented. We were picketed. The Committee for Responsive Philanthropy had a table out in front being critical of us. That seemed totally unfair to me and very unproductive.

We set up booths inside the way you would go to a fair, with each foundation having its booth, its president and trustees present to meet with grant-seekers.

Morris: It's an impressive list of people who agreed to give their afternoon.

Nathan: It was a good experience. I remember rushing through a Safeway store with Melinda with grocery carts two hour before the meeting, piling food into these carts because we felt we hadn't ordered enough for the reception. That was fun. Working with Melinda was always a delight. She was so very competent, although we did have our cliffhangers. I would most likely be better off if I were more of an administrator and less of a hands-on person.

After the meeting there were some feelings still remaining on the part of some of the community groups that they had been left out. We organized two additional meetings, one in the Mission District and one for Asians. We wanted to demonstrate that we hadn't intended to be exclusive. Jan Mirikitani was one of those who felt we could have done a better job. I remember bringing Melinda and Jan together to see if we could reconcile our differences.

Morris: Was this before Jan was on this Arts Distribution Committee?

Nathan: It was about the same time. We knew each other well, respected each other. As you said earlier, Jan wears many hats.

Morris: This was shortly after there had been a big national study of philanthropy that the Committee for Responsive Philanthropy was challenging about the need for increasing visibility of and accessibility to foundations.

Nathan: We did it in a big way. There have been smaller public meetings since this one in 1979 sponsored by the Grantmakers. The Foundation Center Library offers many opportunities for grant-seekers to learn more about foundations and to meet the grantmakers. So, in a way, the need for a mass meeting of this

kind may not be as essential as it was at that time. Grantmakers did get an opportunity to meet trustees and that doesn't happen very often.

Fundraising Skills; Opportunities for Smaller Nonprofits

Morris: We get several announcements a year of rather high-priced consultant workshops on how to write proposals and deal with grantmakers. So, it's become sort of a continuing process of nonprofit staff development.

Nathan: That's true. The withdrawal of government support for many activities has created the need for organizations to place a greater emphasis on their fundraising. The Foundation Center Library can give, and the Grantmakers' meetings do give very critical guidance to small groups who are seeking funds. From my point of view, the tendency toward slick proposals and professional grant-writing is not as productive as presenting a good idea on a scrap of paper to a foundation. I shouldn't say a scrap of paper--that takes the dignity away from it. But a much simpler statement of need and some supporting evidence of the capacity of the people in the organization.

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Nathan: The larger organizations have development officers, and they have access--that's the real difference. Access is one of the revived issues of the last couple of years, as to who has access and how you get equal access. Certainly, major organizations have both skilled fundraisers and access, whereas smaller organizations don't have the funds to put into slick pieces or development and they don't have board members who have access to affluent people or to foundation trustees.

Morris: Are you suggesting, then, that one of the roles of a foundation, and particularly one of the things that you've tried to do at Zellerbach, is to equalize those differentials between larger and smaller organizations?

Nathan: That would be too ambitious. I think we've tried to give opportunity to smaller organizations to exist and to perform. It isn't a competition because they're in different leagues, not in quality of production, but in terms of community acceptance and community support. We're putting funds into emerging arts and emerging organizations. That's out of conviction, it's out of the philosophy of the Fund as to what the trustees think is important in society.

That isn't saying that major institutions aren't important. It's just that they don't need us. Ours are not the critical dollars to them. Their fundraising capacity is tremendous. Those institutions seem to me to have suffered very little, nor have they needed to make the compromises that other groups have had to make because of the conditions in the country or because of the gradual winding down of government support.

IX PROGRAM DEVELOPMENT: EARLY INTERVENTION AND PARENT-CHILD SERVICES

Working with Marin County Agencies: Beyond the Buck Trust

Morris: Let's talk, if we could, about the early intervention and child welfare advisory committees. These seem to me to overlap, and I need you to sort out why they don't.

Nathan: Tell me what overlaps.

Morris: This is on this absolutely beautiful organizational chart.¹ That's a work of art.

Nathan: Yes, it is. Well, that's not my work of art. Linda joined in on that.

Morris: You've got the Early Intervention and Support Services Advisory Committee, and then the Child Welfare Advisory Committee. Which one would have started first?

Nathan: We keep changing terms. It's one of my faults in that I keep thinking of better titles for organizations. The Early Intervention and Support Service was initially the Primary Prevention and Mental Health Advisory Committee. That began about eleven or twelve years ago when Martin Paley was the executive of the San Francisco Foundation and also responsible for the administration of the Buck Trust in Marin. Martin did what I thought was a very far-seeing thing. He recognized that there were disadvantages in being the only visible funder in Marin County. There have been other foundations providing minimal support in Marin, but it was minimal.

¹See page 58A.

Once the Buck Trust was established with their vast resources, those foundations that had been funding in Marin decided that their funds were not critical to the efforts there. Martin was feeling both lonesome and, most likely, put-upon. He suggested to a number of us who had been identified with particular funding interests and skills that we might consider receiving a grant from the San Francisco Foundation for expenditure in Marin. He approached Kirke Wilson of Rosenberg in child welfare, and he approached Zellerbach for mental health.

I was interested because it seemed like a challenge. It also seemed like an opportunity to try out some new regional ideas. I didn't have in mind the idea of soliciting grant requests from Marin County agencies. The Family Fund had been moving toward the concept of creating our own projects.

Morris: So, this is kind of moving into what is now called the "request for proposal" area?

Nathan: In a way. Or more exactly the development of one's own foundation program. Martin was really wonderful. He didn't intrude. He didn't say, "This isn't what I had in mind." He just said, "Develop your ideas and come back to me." I went to Marin County and met with Beverly Abbott, who was then the director of the county mental health service;¹ and Pat Jordan, who was the director of children's services in mental health; Lillian Johnson, who was director of child welfare in San Francisco; and Barbara Majak and Gwen Foster, who were affiliated with mental health in Alameda County; and asked them if they would serve on a committee to develop a proposal for the San Francisco Foundation that would have some meaning beyond Marin. We needed to demonstrate that these funds would have some benefit for the Bay Area.

That was a lucky day for the foundation and for me. They are wonderful consultants and after ten years are still close friends.

Morris: Were these people that you already knew through your own social work practice? Or you identified them by position?

Nathan: By their position. I knew that I needed to work with the mental-health people in Marin. By reputation these were all competent and creative administrators. I also wanted to work with people in public service. We began to meet as a committee to ask what could we do in early intervention in mental health that would

¹See comments on the Early Intervention/Mental Health Advisory Committee by Beverly Abbott in Chapter XIV.

make a difference. We struggled for six months. We began to think that we weren't going to come up with an idea.

Morris: And you'd already identified early intervention as your area to explore?

Nathan: We were thinking that that's where we should work. We hired Robert Apte as a consultant to do some exploration for us about what might be feasible. Bob organized some community meetings in Marin and had some ideas from around the country for us to consider. Bob had organized a post-graduate program in mental health at UC Berkeley.

Our committee was very pragmatic in its organization and direction. Bob felt that we were taking too narrow an approach to prevention. We couldn't find common ground to work together.

The committee then decided that we would initiate parent services in child-care centers. A simple-sounding idea. Our goal was to improve the lives of parents. To be guided by parents' interests, rather than what we thought was good for parents.

We invited child-care groups to join us. In Marin we approached the Fairfax-San Anselmo Child Care Center, which had brilliant leadership from Ethel Seiderman, and Canal Child Care Center, which was working with a black and Southeast Asian population. In order to have a regional approach, the Zellerbach Family Fund supplemented the funds from the San Francisco Foundation to begin efforts in San Francisco with Compañeros and in Alameda County with PCDCI [Parent Child Development Centers, Incorporated]. We later included Wu Yee Child Care Center in San Francisco.

The Parent Services Project still exists, with the Marin Community Foundation taking over where the San Francisco Foundation left off. Legislation has developed from that experience. The legislation hasn't passed but it's come close. There's been a national movement that's come from the Parent Services Project. Ethel Seiderman and Barbara Shaw of PCDCI have appeared at many conferences around the country. They've run workshops. There are models of this program in other communities. Zellerbach continues to fund the program; Marin Community Foundation is redefining their priorities and may not continue. It's always seemed odd to me that some foundations discontinue wonderful programs that are expanding and developing new knowledge.

Long-term Support: Exploring Forks in the Road

Morris: Did the foundation make a long-term commitment to that project, or has the project gone through different stages of evolution?

Nathan: It's gone through different stages. It started off as a very generously supported effort, even to the point where we set up a ten-thousand-dollar option fund in each of the Marin agencies so that the parents could decide what was critical in their lives to fund. That amount of money isn't available now. But the idea of options and the idea of choices and the idea of responsibility is still a very fundamental part of the program. Options and choices should be a part of everyone's life.

I remember one option fund grant that made it possible for a mother to go back to her own mother's funeral. It meant something in the life of that family. Most of the parents never had access to discretionary money because to qualify for the programs that we supported, one needed to have a low-income status.

Morris: Even in the Fairfax unit?

Nathan: Oh, yes. That's state-subsidized. There may be a few full-paying people there, but state-subsidized programs are available to people with low income. They took as long as to decide how to use their option funds we took in deciding which direction to go with the San Francisco Foundation Funds.

Since we've included Wu Yee Child Care Center in the program, they have shown us how to get by with minimal funds. They have been able to run an excellent program with less than \$10,000 per year.

Morris: Within a day-care center?

Nathan: Within a day-care center. It's always a struggle. Some programs exist only as long as the money is available. But it's the concept that's been carried on. Some of the simplest concepts are profound.

Morris: That sounds like six or seven years' funding to this Parents Services Project.

Nathan: It's been eleven years.

Morris: In the world of fundraising, if you get one renewal, you're lucky, and a third year is a godsend. That's really an unusual kind of almost guaranteed support.

Nathan: Our trustees have been unusual in their perspective. You need a long-term perspective when you are developing new ideas and trying to nurture them, and to see them follow their own course. It's like going down a path that goes in different directions. If you're going to set a three-year limit, you may just be at the beginning of another fork in the road at three years and you lose the real benefit from the early work. I just think it's arbitrary if you're only in something for one or two years or three or four years. You miss the value of long-term working relationships. You miss the value of depth of knowledge in the field. I think it's contrary to any hope for ultimate success of your effort.

Morris: In really establishing a new concept.

Nathan: It's possible for someone who has a good concept to keep soliciting more and more foundations. You see this happen all the time. They run their course with one foundation, then they go to another, then they go to another. It's like hand-me-down projects.

I've come to feel that there's no one right way. Long-term commitment seems to work with us. It's established us as a different kind of foundation.

Morris: What do you do with all the other, unsolicited applications that come in? Ignore them?

Nathan: Well, ignore is not a term I would want to use. I'm glad you said that. No, we try to be helpful. I deal with most applications with a phone call. I can phone back the next day. I don't have a stack of people to call each day. I don't have a whole flock of responses to make to grant requests because most people know how we operate. I do lots of phone and office consultation and am always interested in hearing good ideas.

Most of the work we do and most of the ideas come out of discussions with the advisory committees in mental health and in child welfare and from our trustees. Trustees have been invaluable.

Idea Swaps; Moving into Public Policy

Morris: Was part of the thinking in setting up the advisory committees to help the people in the field broaden their thinking and benefit from each other's concerns and ideas?

Nathan: I think that may be a by-product. The people that we work with are leaders in their own fields. They bring more than they take. What they've gained out of this is some stimulation in being around each other and in swapping ideas. It's been much more help to our perspective here at the foundation. These are mostly people, if you look them over, who give leadership to county programs and who are active with the legislature. They carry the major responsibility for the social and human service programs in the community.

I believe that one needs to work with existing public resources if one's going to affect public policy in most cases. There are private nonprofits who are supported with federal, state, or county funds who are a part of the large public system that also have something to offer. We have worked more with the county and state leadership. Beverly Abbott is a good example. Beverly directs one of the best mental-health services in California. San Mateo County, under her leadership, has initiated many new programs. Beverly cares about the clients and the staff. She's a clear and honest administrator and a sensitive social worker. I value her friendship and ideas.

Morris: You prefer to work with the county director of mental health, rather than the county association for mental health?

Nathan: Yes. We work with the people who are on the service-delivery line, who are confronted with the overwhelming need, and who have limited resources. Mental health has changed a great deal since we established our committee. We joke about it every now and then because the need for early intervention is still here, but the critical problem facing our community is with the seriously emotionally disturbed. That's the population that uses the vast majority of community resources. You have to be pretty much of a genius to figure out how to help the seriously emotionally disturbed and still have some funds to maintain programs for younger children or families.

Morris: To prevent the repeat in the next generation.

Nathan: Right. Our society has never quite caught the idea that if we would support early intervention, we might avoid some of the more serious disturbance that comes later on. All of our funds seem to have to go to take care of the worst-case situations, whether it's with children, children in protective services, or with the emotionally disturbed. Early intervention or making any significant change in the life of a family will take more effort than school restructure and social workers in school. We must be concerned about families, neighborhoods, and the demoralizing effect of poverty.

Creating and Implementing the Neighborhood-Based Family-Centered Service-System Concept

Morris: At what point did you get involved directly with public policy Issues with Arthur Bolton?

Nathan: I've known Arthur Bolton for many years because of his work with the regional centers for the developmentally disabled and with his involvement with mental health and Short-Doyle. But more recently, Art became involved with AB 3777 [1988], that set up pilot projects in Modesto, Ventura and Long Beach to work with seriously emotionally disordered adults.

Arthur asked the Zellerbach Family Fund to help support a committee of Lieutenant Governor [Leo] McCarthy's that was going to look into the problems of the seriously mentally disordered. The idea for the committee had come from the passion and the pain of the father of a brilliant student at Harvard. The student had an emotional breakdown at Harvard. The family could not find any treatment or setting that was useful to him. In fact, this young man experienced what many clients experience. They don't seem to be able to accept the confinement of residential treatment. They are shoved out because people find it difficult to work with them. They often don't take their medication. They are not able to live at home because they're often unpredictable in their behavior. Dan Weisburd, who was the father, felt there ought to be a better way for his son to be received by the services. He felt that the system of mental-health care was a shambles. He set about to remedy that.

Morris: One father?

Nathan: Yes, one father, but a very unusual father. The system isn't a shambles, it's overburdened and unable to be as responsive as it should be to the needs of the people they're supposed to serve. I was interested in that.

Morris: How had Leo McCarthy become involved?

Nathan: I think that Mr. Weisburd approached McCarthy. I don't know how McCarthy got interested, but I think he's always been responsive to the needs of people. You would have to respond to Dan Weisburd's emotional involvement and what was correct about his appraisal.

The committee was formed, and I was invited to be a part of it. We tried to raise funds everywhere and couldn't. I think we ended up with three major supporters--Leo McCarthy's committee, Zellerbach Family Fund, and Van Loben Sels, with very minor support from the Los Angeles Mental Health Association. The support was solely for the staffing of the committee and for public hearings and reports.

Morris: The National Institute of Mental Health was not interested?

Nathan: I don't know if they were or not. All I know is that money wasn't easy to come by for this kind of an effort. There was strong resistance to some of the ideas from some members of the official community mental health field, who wanted to develop a much more collaborative effort than one where authority was decentralized, with clients and their families in a planning and administrative role.

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Morris: This was the period when hospital after-care was not available for persons released from state or county hospitals. The community services had not developed as had been planned when the hospital closings were authorized [in the early 1970s]. So, in a way Mr. Weisburd and his son were kind of a symbol of what had happened with the system.

Nathan: That would be a good way of putting it.

Morris: And people were looking for a way to get in there and address this.

Nathan: I'd say that there were conceptual ideas that the community mental-health systems knew but hadn't been able to implement. The whole idea of consistency of relationship; the provision of a variety of services within one setting; returning dignity to the person involved; job training as a part of treatment--these ideas were around but they weren't all gathered into a single, central effort. That was the nature of the proposals that our committee began to develop. We held public hearings. The client group itself participated, both as critics and as people giving us guidance. The California Alliance for the Mentally Ill (CAMI), the organization representing parents, and the self-help organization of clients both gave the legislation strong support.

Morris: It must have been a lively experience.

Nathan: Yes. It was very exciting. Our foundation has been working for many years with the self-help client movement in mental health. Saying that people, given the opportunity, can take a much

greater responsibility for their own lives and for their own decision-making, and that they can play a major role in running the agencies or settings in which they live and work.

The effort to develop legislation and to move it through the legislature was successful. Although we didn't receive the amount of money that we wanted for the demonstrations, we did receive enough to set up three demonstration projects and a very thorough, strict evaluation process. The evaluation will determine if this new form of service to the severely mentally disordered is better than the kinds of services that are currently existing in the community. Those projects are now under way. They are fascinating to follow. I'm part of the advisory committee and steering committee that is monitoring the process.

Morris: Did you also participate in the passage of the AB 3777 legislation?

Nathan: Well, as you know, foundations are not supposed to be involved in lobbying efforts. Therefore, any participation that I've had in Sacramento has been as an invited consultant and expert. I have appeared before committees, but I haven't knocked on doors and asked for votes. There are plenty of people who can do that. Not really plenty--not enough.

Morris: The consultant role is also probably a way you get a better hearing in a way--you get five minutes instead of two to explain an idea.

Nathan: I've been around Sacramento a lot with different causes. It's more like wait for four hours to speak for a minute.

Morris: What kind of response was there from legislators?

Nathan: I think the legislators are desperate to find new and better ways of serving people in need. Naturally, they're concerned about the cost. This particular program required a variety of waivers from state and federal authorities in order to capture and use funds in a different way. We had strong support from the legislature. We're getting increasing appreciation from community mental-health directors, who as a group are forward-looking people. They're just caught in a horrible fiscal situation.

The concept of a broad team including recreation therapists and job training, community development, socialization and support groups as part of a program is appealing to community mental health. There is change coming about on its own without the formal project development that we have going in Stanislaus,

Ventura, and in Long Beach. AB 3777 has made an impact without new money going into all state mental-health programs.

That seems to me to be the goal of much of what we try to do here at the foundation, to use the power of ideas to change practice in child welfare or in education or in mental health-- in those fields where we have concern.

Morris: Why Stanislaus and Ventura?

Nathan: When the state develops a program and the legislature has approved funds for support, there is a need to distribute that money equitably, or at least on some rational basis. A request for a proposal was developed that was sent to private nonprofits, as well as to community mental-health programs. The committee received around thirty proposals. Just the way some foundations work, a distribution committee was established consisting of state and county staff, advisory committee members, and people with other experience. The Long Beach, Modesto, and Ventura programs seemed to capture the spirit of the legislation and had the strength of personnel to carry out the project.

Two of the demonstration programs--Stanislaus and Long Beach--are administered by nonprofits, whereas the Ventura program is administered by the Ventura County Community Mental Health Service.

Keeping Trustees Informed

Morris: Did your trustees here at the Zellerbach Family Fund have any anxiety about moving in this close to the actual process of legislative change?

Nathan: They know the law. They know that I know the law. I think they are more excited at the prospect of a new concept being tried that has national implications. We are not using our money or our influence to buy votes. Most members of the legislature encourage our involvement.

Morris: Would Mr. Bolton have come to San Francisco and met with the trustees and you in talking about that?

Nathan: Yes. There are a number of ways that trustees keep informed. In our kind of operation, trustees are aware of areas of work that we're involved in sometimes three months to six months ahead of the actual funding decision. It's not always that way. I'm sure that sometimes things do come up with a briefer time interval.

But we do have program meetings and board briefings, and we regularly send packets of information and reports to trustees. The briefings take place prior to board meetings, say an hour and a half before the board meeting. Briefings attempt to deal with broader concepts and emerging issues in society, or developing programs.

Art Bolton and his colleagues from the Family Welfare Research Group at UC have met with trustees to talk about what's going on in the mental-health field, or in child welfare, or in the drug-exposed infant field. Briefings often bring someone from projects that we're funding to keep trustees up to date so that our staff isn't the only translator.

I think in the long run that provides our board with a greater sense of involvement than wading through grant requests or grant digests and hearing staff comment briefly on them. Our board isn't a naysayer. They are more in the improvement field and the development field in that the suggestions that our board give expand and enrich our projects, rather than limit them. Our discussions are generally, should we be working in this area. What are we trying to accomplish? It isn't a detailed examination of budget or project or organization. It has to do with the organization and what we are doing to strengthen and help the people in those projects succeed.

Morris: Is this Bill Zellerbach's approach to the proposals that come up?

Nathan: I'd say that's Bill's approach, but it's also Verniece Thompson's and Bob Sinton's and Lucy Ann Geiselman's and Jeanette Dunckel's and every board member's.

Morris: Do some of them have different areas that they are more or less interested in?

Nathan: I think each trustee has a different area of expertise. It's difficult to begin mentioning individuals because then somebody's going to be overlooked. Each trustee brings a special perspective. We are a good team with no special advocates. Verniece Thompson is very sensitive to organizational concepts, to staff and project leaders, growth and development. Her perspective influences those of us who are developing projects. Jeanette Dunckel is an expert in the child-welfare field--she devotes a good part of her life to this. She has a perspective about the needs in the field. Then, we just have a whole group of people who are good listeners and thinkers.

There are no better listeners than Bob or Lucy or Bill. They can see in a project what those of us don't see who are so close to it and who are so enthusiastic for it, such advocates.

Often there's something very obvious that we miss just out of our own enthusiasm. Trustees also come up with new ideas for staff to pursue. All the good ideas don't come from me. John Zellerbach is interested in families and work. Stew Adams in soliciting ideas from line workers in social service. We are developing projects in these areas.

It's a very wonderful working board. We have financial experts. John also takes responsibility for looking after the foundation's real estate. George James, who's the chief financial officer at Levi Strauss, who has been president of San Francisco Ballet, brings a gentle and clear understanding of what's needed for an organization to succeed.

Morris: Financially?

Nathan: It goes beyond finance. There is a perspective of responsive management that's present in our discussions.

Balancing Program Budget

Morris: Will they sometimes suggest that a project maybe needs more money or less money than is presented in the given proposal?

Nathan: They're much more likely to suggest that a project needs more money than less money. I was thinking about our first interview, it was rather personal, but I was trying to talk about those experiences that mold a person, that are reflected in the way they act when they carry a different kind of responsibility. I am very generous in some ways, but having grown up in the Depression, there's a tendency to be tightfisted at times. I know that, so I overcome it occasionally. But there are times when foundation staff, in the interest of running a tight ship, tighten it beyond the need. I think a board member is in a position to encourage us to be more generous. That's a role that this board takes occasionally. They're not nitpickers over amounts.

One of our projects is concerned with the treatment of mothers whose children are drug-exposed.¹ The cost per mother is rather substantial. The program concept is being accepted across the United States. The goal of the project is family preservation. Even though the initial cost is high, the result

¹"New Hope for Drug-Exposed Infants and their Mothers," Margorie Beggs, San Francisco Study Center, San Francisco: Zellerbach Family Fund, 1990.

is inexpensive in terms of the tragedy and long term costs on the other side. The trustees consider cost versus benefit. It's not, "That's too much," because most of our grants are fairly modest. Trustee attention to cost has to do with, are we being fair to the people who are working in our projects, and is there going to be a benefit eventually that's going to justify this expenditure.

Morris: Do they generally discuss the financial aspects of a proposal or a program?

Nathan: Not too much. I think that would happen more if they were looking at a series of grant proposals that had nothing to do with our knowledge base. But most of the grants that we make have been developed by our own staff or in collaboration with the organization that's going to carry out the project. The budget isn't strange to us.

Morris: And they fit into the foundation budget that has already been discussed overall--that this is what we're going to have to work with this year.

Nathan: Right. We do have policy meetings. Trustees are in very clear touch with all of our projects. I suppose the hardest thing is to connect the name of the project and the actual work. We identify projects with catchy little terms like "B.O.L.D." or "Word Weaving"--you have to be certain that you know what you're talking about. In fact we made a little glossary once.

Morris: I saw that. That's delightful and very helpful. I was wondering if occasionally they decide that a program is sufficiently interesting that they want to go into principal?

Nathan: We haven't been confronted with that need. I don't think there's any reluctance. I've never felt in any keen way that I've had to compromise, or that if we only had an extra fifty thousand, we could do this. But I suppose it's like a family. Maybe there's some disadvantages in being around a long time. You learn to live within your means. You learn to plan your programs in relationship to what you have available. I'm certain if some great idea came along, they would consider using the money from principal. Our assets have increased dramatically over the years. That affects our payout. There just hasn't been the need to go into principal. It could be a weakness on my part. Money hasn't been a conscious factor in limiting our ability. Most foundations accept the philosophy of spending income and preserving assets.

Morris: There would be another aspect of being in a program field for the long term--if you don't fund it this year, you can do it next year.

Nathan: Well, that doesn't really suit my personality or theirs. I think if there's something worth doing, we should do it. We're now developing the neighborhood-based family-centered service organization concept. It could be that support of demonstration projects might bring a challenge to our funds. Right now, I don't think it will because we have some programs that are winding down. So, it balances, and maybe that's what foundation executives are there for, to keep the whole organization in a reasonable balance so that your trustees aren't confronted with too many painful--not painful decisions, but pressure situations. It's more pressure. I don't think I should be in the role of pressuring trustees, except intellectually and emotionally.

X NORTHERN CALIFORNIA GRANTMAKERS TASK FORCES

[Interview 3: July 5, 1990]##

Member Involvement in Joint Efforts

Morris: We wanted to talk about the cooperative efforts by Northern California Grantmakers, and include a little bit about the technical assistance and publications program that the Family Fund has done. I have a couple of questions that you probably will touch on in talking about the notes that I see you have put together.

Nathan: Why don't we talk about the Northern California Grantmakers and their role in Northern California, as well as their emerging and developing role in the United States. It seems to me that the Northern California Grantmakers have a vitality and a purpose that is unusual in the field of regional associations.

Morris: Foundation associations?

Nathan: Foundation associations, or, I suppose you could say, most professional organizations. Those organizations that I think of are primarily to protect the territory of the members and to have some role in the education of the membership. The Northern California Grantmakers have moved beyond that. I mean, they do fulfill that role of education and orientation to the field and do encourage professional development. But over the past eighteen to twenty years, the Grantmakers have become involved in the organization of services and collaborative work that I think is unusual.

Morris: Did you envision that, or did some of the founding members envision that twenty years ago?

Nathan: I doubt if the organization saw that as a role. Like so many other things in life, it evolved. The organization responded to

what were viewed as critical situations and then developed programs to meet those situations that individual foundations could not meet on their own. Individual foundations can meet those situations but not in the all-encompassing way or with the vision that the groups have working together.

I can think of the recent examples: the Task Force on the Legalization of Immigrants, the Earthquake Recovery Fund, the Task Force on Homelessness. Earlier examples of cooperation were the Foundations/Corporations Emergency Committee and the Arts Loan Fund. There was also a flood-relief program that Hugh Burroughs started for relief of victims of the Napa area floods in 1986.

These have been staffed either by NCG or by consultants hired for the purpose. The spirit and the determination of policy, however, and much of the work has been done by members of the Northern California Grantmakers. That's what makes it an unusual organization--the responsibility is not always delegated to staff or to the consultant. The membership becomes very much involved in these joint efforts. It takes great skill for Steve Lieberman and now Caroline Tower to relate to the Foundation personnel involved, the consultants, the agency representatives and the demands of all of these groups. There are many professionals involved.

Morris: Kind of professional volunteering.

Nathan: In a way. It's an add-on to one's job if one sees it that way, but it's also an opportunity to become better informed about a field and to share one's capacity and one's leadership abilities with one's colleagues.

Morris: Who were the people that you think of as having been key initiators along the way in these ventures?

Nathan: I'd say John May, Henry Izumizaki and Martin Paley. Martin proposed the Proposition 13 committee to explore the foundation role in a changing society.¹ I was instrumental in encouraging my colleagues to join collaborative efforts.

These are, on the whole, regional efforts that cover many counties, rather than looking at a single county or city experience. Foundations are well suited to look at a single, local need and to respond to that need. Collaborative efforts

¹A June 1978 state ballot measure that sharply limited property tax revenues, thereby curtailing revenues for local governmental services.

respond to regional problems that affect large numbers of people. That's in the spirit of using funds most effectively.

Friction Points

Nathan: There is some minor concern about the collaborative efforts that I don't think is a serious concern. It has to do with taking away the prerogative of the trustees of foundations to make decisions and placing that responsibility with the professional staff of each foundation. The trustees, however, make the major decision that they want their foundation to participate in a collaborative effort and in that way maintain some control and responsibility.

Morris: That usually happens early on?

Nathan: Yes, I doubt if there is a foundation executive who can enter his foundation into a task force or into a joint effort without the permission of trustees. I'm most likely using this as an opportunity to express a very personal point of view.

Morris: It's a very interesting one, though. It indicates that in your idea of a well-run foundation, the staff and the trustees are in fairly constant communication on an idea basis, as well as a "what came in the mail," or "what's going into the next agenda."

Nathan: Yes, that is an expression of the way we work. It's also based on a mutual respect and trust basis. There are some concerns that the Northern California Grantmakers had at one time that the task forces, that represented only maybe fifteen or twenty of the seventy-five organizations in the membership, were seen as speaking for the total membership.

Morris: Did that come from some non-participating persons?

Nathan: No. I think it came primarily from those people who were very good bureaucrats and good administrators who correctly saw that these groups were spin-offs of the major organization and had some responsibility to the board of directors. Since we're all members of the same family, however, it's very unlikely that a radical set in the foundation field would go off making statements that would embarrass their colleagues.

Morris: Yes, except if you're talking bureaucratic or organization, one of the things that sometimes happens is that a small group gets carried away with an idea and does attempt to speak for the larger group.

Nathan: Well, I think that it's possible. As one becomes familiar with a particular problem, one develops an expertise and a commitment to a resolution of that problem that those people who aren't involved most likely don't have. So I see it as a proper NCG board concern but not one that should impede the work that's being done by the task force. And it really hasn't. It's more or less one of those proper concerns that requires good communication.

Morris: How about any concern expressed by what might be termed the grantee community--that they might have some ideas in these areas and feel that the initiating of cooperative or regional ventures should come from the recipients rather than the foundations themselves.

Nathan: NCG task forces are not isolated from the community. In some ways they're much closer to the community than an individual grantmaker, who can very subtly exercise control over the grantseeker. The existence of the task forces in many cases has encouraged individual grants to local service organizations by individual foundations. Collaborative efforts look at broader policy and service delivery opportunities that in the long run will be more effective or can be more effective than support for a single organization.

I'm sure there's some concern by grantees, but that hasn't been formally articulated--I'm fumbling around now because it's very difficult for grantees to be openly critical of foundations because they fear some kind of retribution. But I think people who look at collaborative work objectively would say that these efforts have made a contribution to problem-solving, rather than becoming a source of friction for the community.

Morris: Are you saying that generally a task force doesn't come into being unless, through working with community agencies, foundation staff get a sense that this is a concern?

Nathan: No, I don't think that's the way they start. I think that's the way they may develop. But I think they start from an obvious collection of factual data that points to a serious situation in society that isn't being addressed in any organized way by the foundation community or the general community.

It does give foundations an opportunity to be what they say they are, which is on the cutting edge or at least in early recognition of the existence of a situation that needs attention. I think in that way it promotes or helps the self-image and the self-concept and the self-esteem of those who work in the foundation field. It gives us an opportunity for outreach. It

gives us an opportunity to use our own intellect in a positive way, rather than always in analytic, budgetary-review way of responding to grant applications that they receive.

West Coast vis-a-vis National Foundation Affairs

Morris: What was the response from other regional foundation organizations when NCG began to move in this task force?

Nathan: There was originally curiosity, but not much wish to go through the struggle of establishing a new way of working. I think over the last five to ten years, regional associations of grantmakers have seen the importance of this kind of collaborative effort and look to Northern California Grantmakers for information and leadership. It's the leadership within the foundation field that makes some of this work happen. I believe that it makes the job of the executive and staff of NCG a much more vital one in the community than one that focuses only on its members and how to keep them satisfied. A few years ago Tom Layton, one of the truly generous people in the foundation field, nominated me for the Robert Scrivner Award in recognition of my work involving collaboration.

In gratitude for the honor I met with groups of foundations in Chicago, New York, Detroit and Boston to talk about the benefits of collaboration. There was interest and inertia. It's going better now that the spotlight is off me and on NCG.

Morris: I see a fair number of Bay Area names on the board of the Council on Foundations. Is that a consistent sort of a policy matter-- the Council on Foundations seeks to have people from every region, or have California grantmakers been active in trying to take part in Council on Foundations activities?

Nathan: I've only been on the nominating committee of the Council on Foundations once, and there's most likely good reason for that from their perspective. The Council tries to keep a regional balance. There are so many outstanding foundation directors and program executives on the West Coast that they just need to make room for them. Currently Susan Silk, Tom Layton, Hugh Burroughs, Douglas Patino--I could be leaving someone else out--are now a part of the board of directors. Leslie Lutgens, who is recently off of the board, gave magnificent leadership to the council as

its chairperson.¹ So I think that Northern California has a good reputation with the council.

Morris: That's interesting. Fifteen years ago, when we began this looking at some of the history of Bay Area Foundations, a lot of people commented that they felt isolated from the foundation world, and that the power center--that's my phrase--that authority and decisions tended to emanate from New York and be focussed on New York. Is that still true, or what's contributed to what sounds like a change?

Nathan: I don't know. I think there is more mutual respect between East Coast foundations and West Coast foundations than maybe there was once. Part of that is due to the existence of major foundations on the West Coast who weren't here fifteen or twenty years ago. And I think part of it is the enlightenment on the East Coast of the Ford Foundation and Robert Wood Johnson Foundation and the Rockefeller family funds about the work that's being done on the West Coast and the need for partnerships if they're going to fund out West.

Morris: That was what I was going to ask next--if in addition to the cooperation among Bay Area foundation, there's some similar efforts between regional foundations and national foundations.

Nathan: I can think of a couple of instances. The Ford Foundation now has a membership in the Northern California Grantmakers. That's a new experience. The Ford Foundation is also participating with the East Bay Community Funders in the development of a program in the Oakland area to be useful to youth.

Since we don't do a great deal at Zellerbach here with major foundations outside of the Bay Area, I'm just not familiar. There could be other instances of cooperative efforts. I think of the development of "Eyes on the Prize," where Tom Layton and the Gerbode Foundation were instrumental in promoting the need for that film. Tom was also essential in persuading foundations around the country to join in support. I think that there is respect for the viewpoint of some of us in the West Coast, other foundation representatives from the Bay Area did have an opportunity to speak on behalf of the San Francisco Community Mental Health Service when the Robert Wood Johnson Foundation was considering its grant for the City and County of San Francisco. In that way there is better communication or at least the opportunity for communication between local and national foundations.

¹See Leslie Luttgens, ch. XVI.

Increased Community Participation

Morris: Are there some things about some of the individual task forces in the Bay Area that you'd like to comment on? Are there some similarities in structure?

Nathan: There's a broader base of participation than there used to be; there's a greater mixture of corporate, community, and private foundations involved in task forces.¹ There's much more willingness of the foundations group to invite the participation of the leadership of the community concerned with a particular subject to join with them in trying to work out the best way to use funds wisely.

The Task Force on the Legalization of Immigrants did a wonderful job of having grantee participants provide some guidance to a group of twenty foundations. That was true of the Refugee Task Force, as well. An openness has developed between funders and grantseekers. Funders would have been uncomfortable with this in the beginning of these task forces. So I think that there's been an openness that's developed that, most likely, we would have been uncomfortable with in the beginning of these task forces.

Morris: How would the foundations have gone about developing the contacts with identifying who the leadership would be in some of the new immigrant communities?

Nathan: There usually isn't that much identifiable leadership in new communities even though one talks about indigenous leadership. There are usually only two or three people who have become identified as the leaders. They're not too hard to spot. You try to find people who have a perspective that's broader than the single-agency delivery service person.

For example, Emily Goldfarb, who headed up the Coalition for Immigrant and Refugee Rights and Services. Emily Goldfarb and her colleagues identified the need for a hot line or for an information and education service or an outreach program that involved refugees themselves. The task force was encouraged to

¹See Edward Nathan, "The Foundations/Corporations Emergency Fund Committee," in Perspectives on Collaborative Grantmaking, A Resources for Grantmakers, Northern California Grantmakers. Copy of article in supporting documents in The Bancroft Library.

initiate these projects by the people who were closest to the field. We were able to encourage the development of direct service programs, hot lines, information, advocacy, outreach programs that I don't think would have existed if we hadn't established the forum, the funding, and the opportunity to meet with community leaders.

Morris: These direct service programs were being operated by Northern California Grantmakers?

Nathan: We were not operating the programs. We were helping to initiate the program operated under another auspice. We didn't take direct responsibility. I think that's one of the concerns, but as I can remember, we don't operate a direct service, but we find someone who can operate that service. We find a home for the service. We can expand an existing service to include a new format. That's essentially the way the Zellerbach Family Fund operates. We haven't run a service out of the foundation, although we have helped to coordinate and write grant requests. We've been a very important part of developing programs in the same way the Northern California Grantmakers and the coordinators or consultants that they select are very close to the programs that the grantmakers have initiated.

For my own part, that makes this work exciting and worthwhile. I think other foundation executives have caught some of the same spirit of this way of working. That doesn't mean one can't feel useful and serve a very good purpose by responding to someone else's grant request. That's just a different way of working. I prefer to be involved.

Morris: Kind of a hands-on approach.

Nathan: It's a hands-on approach without being directive. Being aware of the pitfalls of combining money and power or whatever personal power one has or personal influence. There are dangers. It's really having equal concern. Most likely there are those who say you can never be equal as long as you're putting money into something--that gives you a dollar edge in decisionmaking. I prefer to think that those of us in the foundation field can be sensitive enough to the situation to make certain that we can be disagreed with, that we can be totally wrong, that we can change our minds, that we are interested in getting the job done, rather than to use money as the leverage or control.

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Morris: Have you or these task forces been challenged along the way, that they were not representing what the community in the particular case sees as the need?

Nathan: I don't think anyone has challenged the work that we've done. There have been individual grantmakers, and there still are, who prefer to work on their own, who prefer to find their own priorities with their boards, who do not see community participation or collaborative effort as their goal. I think they're very much in the minority. I think they're misled. It's not any coalition of people. If you listen to people speaking about collaboration, you can tell when someone is enthusiastic, and you can sense when someone is resistant. As long as colleagues aren't actively undermining there's room for difference of opinion. I'm most likely making more of this than exists. But since I have experienced sniping at times, I think that I might as well say that it's a minor blip on the screen.

Interaction with Grantees, Consultants, Legislators: Emergent Family Needs Program, Season of Sharing

Morris: You've been involved in so much of this collaborative work that this is great chance to talk about some of these aspects of it. I wondered also what this kind of collaborative effort does to individual organizations that are on the participating end--a direct-service organization. How do you identify an organization that can expand or shift its activities to take on one of these new projects that's initiated as a result of the collaborative process?

Nathan: That work has been done by the consultants that we've had who have been assigned to the projects. They become familiar with the needs in the community in the same way the one individual foundation executive who is interested in a particular aspect of society would become knowledgeable. They bring to the task force all of this information what they've learned. It's from that we are able to determine where our funds would collectively do the most good. Then, organizations are asked to develop a proposal or to respond to a request for a proposal that the foundation group has developed.

I think that that brings those organizations into a partnership with a group of funders. There is an opportunity for give and take. There is an opportunity for modification of the concept that in a way can represent the best of working relationships in the field. We've had excellent consultants and

excellent leadership. Philip Ritter, who helped with the Task Force on Legalization and was the beginning consultant in the Task Force on Homelessness, was a remarkably inventive and entrepreneurial person who would put creative service packages together.

Morris: He's a new name to me.

Nathan: Philip Ritter is like a utility outfielder for the New York Yankees. He has done fill-in program-officer work for the San Francisco Foundation and for the Northern California Grantmakers. He comes with great commitment to human service and brings a quiet determination that is very powerful.

Morris: He's a free-lance social service consultant?

Nathan: He's a free-lance accountant who has all of the gifts of the most skilled of human service workers. He was a major factor in these task forces. Dick Ridenour serves as consultant to the Task Force on Homelessness. Dick also brings very special qualities that has to do with organization and structure and political process.

We've had other leadership. There have been other people involved in the Emergency Family Needs and Housing Assistance Fund who have been helpful, but there the leadership for the programs have fallen more on those of us in the foundation field. I remember devoting a great deal of my time to working on the Emergency Family Needs Project and being a consultant to the legislature in trying to pass family-needs legislation. Steve Lieberman and I worked with Assemblyman Robert Naylor, Jackie Speier and Art Agnos. We appeared before many assembly and senate committees with our findings. Leadership came from the foundation community and from the executives and the leadership of the Northern California Grantmakers.

Morris: Because it was more of a governmentally focussed effort as it developed?

Nathan: It was a multi-county effort. We were directly involved in the administration of the Emergency Family Needs Program. Many different social agencies, counties and regional groups were involved. Northern California Grantmakers served as the coordinating group and still does. There was active participation from a number of foundations. Duane Silverstein of the Richard and Rhoda Goldman Foundation was active with the Emergency Family Needs Program and carried that interest over to the administration of Season of Sharing.

Morris: The Season of Sharing--to me it has an interesting kind of a traditional quality because I grew up on the East Coast, and I remember as child the New York Times and its "Hundred Neediest Cases;" that was major community push in the thirties in December. Is there any logic to my identifying the two kinds of efforts?

Nathan: It was Ira Hirshfield who really rescued the Emergency Family Needs program by persuading the Chronicle to initiate the Season of Sharing. Ira drew on experience around the country of similar funds. Season of Sharing is a useful undertaking, but it doesn't really take the place of a broader service that covers a larger area in California and that has a consistent funding base.

Morris: And operates twelve months of the year instead of one.

Nathan: You are correct. The money does run out. You are okay if you're first in line or apply during the first fifteen days of the month. There has been government legislation that's taken some of the ideas that were part of the Emergency Family Needs--the payment of first and last month's rent and some protections to people who are receiving AFDC funds. There is legislation being proposed that incorporates the ideas of the Emergency Family Needs Program. This won't be the year for that in California because of the budget and because of the governor [George Deukmejian]. I think eventually there must be a greater sense of responsibility for people in economic crisis. Those programs must be a state or federal responsibility and should not rely on the charitable impulse of individuals.

Morris: You mentioned that Philip Ritter worked both on the immigration task force and homelessness. Was that because he was available or was there some kind of structural connection between the two programs?

Nathan: In an effort to get off and running on the Task Force on Homelessness, Henry Izumizaki and I, who were co-chairs, invited Phil Ritter to help us get the Homelessness Task Force started. Phil had been consulting with the San Francisco Foundation on homelessness so he was informed. In a way that was an error of process. It would have been better if the entire membership of the Task Force on Homelessness was involved in the selection of Phil to do the job. The composition of the task forces was different. Phil did work that out, but we put him under some strain having to prove his capacity, that we already knew, to a group of new foundation officers. After working very well with the Task Force on Homelessness, Phil decided that he would rather have more stability in his life. He's off now trying to find regular work either as an accountant or in the human-service field. Task forces are just what they say they are. They only

last so long, and you can't guarantee that there are going to be new situations in society that require joint attention and group attention.

Creating a Task Force: Bureaucratic Structures

- Morris: Part of my question was the sense of timing and how one task force evolves into another or the extent to which they overlap. I get a sense of a really intricate and elaborate sociogram, to use Tom Layton's term, on how these issues overlap, partly because among the people involved--there's overlap from one task force to another, and then they are active as trustees or staff.
- Nathan: There are usually enough developing problems in our community that one doesn't have to worry about finding issues.
- Morris: True, but how does NCG select which issues to create a task force around?
- Nathan: I suppose that someone has to be moved enough to say, "I think if we work together, we could make a contribution here that we can't make alone." There needs to be a problem of regional dimension that would justify our getting together, and it has to be one that is, in a sense, based on a strong value consensus so that we aren't going to create a division within the Northern California Grantmakers. It has to be unanimously agreed upon as a useful venture. Even if many foundations choose not to participate, they can hardly say we shouldn't be involved or concerned.
- Morris: Or that it shouldn't be addressed. Does the fact that some of these seem to be matters in which the task force is working toward a structural change in the way the community deals with things-- is that a criterion?
- Nathan: I think that's a spin-off of the experience more than a stated purpose when one initiates a program. It's only when you become deeply involved in programs that you recognize that any improvement you make is going to be limited by the structures that exist to deal with the problems. Those structures are generally within a county or state. They represent a categorical and fragmented response to problems. Changing structure however doesn't guarantee improved service.

You don't really come to the frustrating point at which you say, "This system needs to change," until you've been struggling around trying to improve one aspect of service. That doesn't

negate trying to do something useful for people who are caught in the current service systems.

XI GOVERNMENT-FOUNDATION RELATIONS, DISSEMINATING PROJECT
INFORMATION

Public vs. Private Funding Responsibility

Morris: The other area that we might talk a little bit about is government spending limits. You mentioned it a little bit in terms of this year's budget. But 1981 is sort of the watershed when Reagan became president and, as a policy matter, began to say, as he'd said in California, that the government is spending more money than we can afford, and he initiated some fairly drastic cuts. Did that have an effect of spurring some of these collaborative efforts among grantmakers?

Nathan: It served to call our attention to a need. I was a part of organizing an NCG meeting where we said that one couldn't turn one's back on the need, that foundations couldn't say, "This is the government's responsibility, and if they don't choose to take it, we will turn our backs on the people who are going to be injured." A number of us proposed various "affinity groups." That's a term we all wish we had never heard of because it's become very common. Then it wasn't quite so popular. We proposed affinity groups that were to be concerned about families and children, youth and employment, legal services for the poor and health.

Those affinity groups had a hard time getting off the ground. People signed up to indicate their interest. Youth employment has evolved into the East Bay Funders. The group struggled for a long time, knowing that members wanted to participate in a group but found it difficult to find a focus. We looked at the Oakland area and the schools. We went from youth employment to youth in education and now, most likely, the funders will look at youth in an area or a neighborhood. Gwen Foster, who works with us at ZFF, is very much involved in that project. I hear about it mostly through Gwen.

The family and children's affinity group couldn't find a focus. That affinity group evolved into the Emergency Family Needs and Housing Assistance Fund. The Common Law Fund struggled for many years with a very small membership. After three years, we disbanded that effort since there weren't enough foundations who really supported legal services for the poor. Those who are interested support those organizations individually. The Van Loben Sels Foundation really understands the critical need for legal services for the poor. A good percentage of their funds go towards that effort.

Morris: Almost sounds like there's a similarity to some of the old Council of Social Planning units. It was before affinity groups in that they were called sections, I believe. That was agencies.

Nathan: I think the task forces work much more efficiently than the affinity. Affinity groups are looking for an area where joint funding can be effective. The task forces are confronted with a situation that's immediate, that comes out of a current crisis, task forces develop a response to the crisis with the idea that within two to five years, we will have either made a contribution to the resolution of the crisis, or that we will have learned enough that we can go our individual ways. We can also become weary of working at tough problems. Affinity groups often meet for their own education. It seems to be a much longer process. That's maybe an artificial difference, but it's most likely a statement of the practical way these things work out.

Morris: I was also thinking about President Reagan's interest in encouraging the private sector taking on the responsibilities for some of the programs that the federal government was going to cut back on. Do you remember talking with people in the president's Committee on Private Sector Initiatives?¹

Nathan: I've been involved in a number of meetings of that kind where I have tried to be both polite and realistic. It's not possible for the private sector to take on the responsibilities of government. At the same time it's not possible for those of us who care about other people to sit by and to see suffering on our front door and pretend it's not our responsibility. I'm for doing something about the situations that exist in our society that we can do something about as foundations and private individuals. But I'm not for saying that this is an ongoing responsibility of the private sector or that volunteerism is going to solve very much.

¹"Private Sector Initiatives," Edward Nathan, Presentations to Jim Coyne, President Reagan's Special Assistant for Private Sector Initiatives, July 11, 1983.

I'm involved in a meeting in Sacramento called by the state Office of Refugee Resettlement where I'm asked to speak about foundation support of refugee needs. The meeting is called because the federal government has consistently reduced its support to refugees. I will take the position at that meeting that the refugees should organize to secure their just funds from the government, and that the search for private support will not meet their needs as organizations. That doesn't mean that there won't be some help from private foundations either in advocacy support or in support of referee organizations that perform a unique service. People in need cannot depend upon charity or philanthropy.

The Northern California Grantmakers have been recognized for their Emergency Family Needs Fund as one of the fine examples of public-private cooperation. The motivation, however, is not to prove that the Reagan concept of private responsibility to meet public need is a valid one. There's a little bit of that in President [George] Bush's emphasis on volunteerism. There isn't anything wrong with volunteerism and it's fine for those people who want to volunteer and can bring benefits. It is something to be encouraged. But volunteerism is not a substitute for planned programs, and it is not a concept that provides security to people, either, in housing or employment or in education or any of the basic needs that people have.

Morris: Did you feel that some of the Reagan people and now some of the Bush people understood what you were saying and accepted it? Were they sympathetic at all, but speaking rather from a matter of financial reality as they viewed it?

Nathan: They seem more interested in shedding government responsibility and in relying more on individual action and contributions. They would rather have someone else Give Five¹ than take responsibility. I never felt that the public/private partnership advocates listened.

Morris: Well, the Give Five campaign would have probably come along in due time, anyhow, out of the concerns of the philanthropic community.

Nathan: Right. Of their needs and the United Way's. It's only when one assumes that the Give Five Plan in any way meets the needs of society that's when I'm concerned.

¹The Give Five Campaign encourages individuals and corporations to give 5 percent of their income annually to charitable organizations.

The Conservatism of Foundations

Nathan: You are not going to find strong opposition to government policy organized by foundations. That's going to happen in one's private life because the foundation field is essentially a conservative group politically.

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Morris: You were mentioning that you see foundations as conservative and yet, in the research that I've been doing there's at least one segment of the foundation world that is exceedingly active and concerned with, as you said, the cutting edge of social change. Is that a smaller portion of the philanthropic community?

Nathan: Well, why don't you tell me what you're talking about.

Morris: I define conservative as doing things in a traditional way and, in the philanthropic sense, making gifts to the same organizations; pursuing the usual way of doing things.

Nathan: What's the cutting edge? What is the "working toward change"? I'd be curious as to what you've been hearing as to a couple of examples of what you believe are progressive, cutting edge--not foundations but projects or stances.

Morris: Maybe things like the Goldman Environmental Prize; looking for a way to get visibility and attention focussed in an area that is of concern to the donors. Some other project like the San Francisco 2000 trying to bring groups together to look at things in a new way, kind of like some of the task forces that you've been describing.

Nathan: Maybe I was thinking in a different context and a slightly broader perspective because San Francisco 2000 could come up with recommended social policies that aren't going to really ever be implemented. The Goldman Environmental Fund is an important venture, but that is for recognition of people who have already done some very wonderful things. It isn't necessarily in itself changing anything, but it is giving some recognition and leverage to some very courageous people.

Morris: Work in progress, rather than in a lifetime.

Nathan: It doesn't change the accessibility of health care, prenatal care for people who don't have it. We aren't able to avoid the

malnutrition of so many of our children, the school dropouts, the racism and discrimination towards people of different color--or provide anything that approaches some equity in society.

I think when I mentioned conservatism, I was thinking of foundations as an organized philanthropic group who need balance to maintain themselves. It's very difficult, except for a few foundations, to act in a way that isn't conservative politically. I guess I was thinking of conservative in terms of relationship to government or relationship to city and county government or to state.

Morris: Or the current way of doing things, whether it's political--

Nathan: Right. Conservatism isn't a term that's used in any derogatory way because, I suppose, I'm essentially a part of that definition, as well. It just has to do with the expectations that one can have of oneself. It doesn't mean that what we do at ZFF and what my colleagues at Columbia and Van Loben Sels, Gerbode and the Friedman Family Fund do aren't extremely useful. It's just that we're generally working within a fairly narrow field.

Morris: That's useful. I just thought I'd stop and ask you about that.
[Interruption]

The Marin Community Foundation and Other Recent Foundations

Morris: What I wanted to get back to is specific. You were speaking of working with government, and every now and then, somebody from government comes into the foundation world. If I'm correct, Douglas Patino was a Sacramento official before he joined the Marin Foundation.

Nathan: I knew Douglas when he was in Sacramento, working for the Developmentally Disabled Department in the Health and Welfare Agency.

Morris: He's taken part in some of these task forces?

Nathan: Not directly. He did attend a couple of meetings of the Task Force on Legalization and encouraged the Northern California Grantmakers to take an active role. Usually the people who participate in the task forces are not the executives of the major foundations. It is generally program staff or the program executive who participates. Douglas would assign one of his staff

members to attend. The larger the foundation, the more likely a program officer will attend rather than the executive.

I think it's important for program executives to participate. I also think something is lost when the executive is not close to the operation, but then that may be impossible for someone who is essentially running a large organization, who carries a corporate responsibility for administration. I think that it's helpful to have the visible support of the CEO.

Morris: I was wondering if somebody like Mr. Patino, who comes from government to a private-sector organization, tends to look at things in a governmental fashion, or if it's possible to make the bridge?

Nathan: I think it's possible to make the bridge. I had worked for county government for seven to eight years as part of my own work experience. It helps to appreciate the responsibility of government--county or state--and to make it possible for those organizations to work together and to draw from each other. If you haven't worked in a county or a government sector, it would seem like a foreign organization that one does not include as part of one's thinking in terms of service-giving. It's easy to separate the public sector from the private sector and concentrate on what one can do in the private sector without the recognition that the public sector is most likely carrying 60 per cent of the funding and seventy per cent of the responsibility for service. I think having worked for government makes it possible to work cooperatively and to develop a deep appreciation of the capacity of people who work within government. Douglas Patino and Drew Altman bring a needed perspective to foundation work.

Morris: You mentioned at one point in our conversations that you had not been active in the observer group that NCG put together when the Buck Trust was challenged. But I wondered if you did have some observations as to the effect on the foundation community in the Bay Area of the Buck Trust's progress through the courts and then its shift from the San Francisco Foundation to becoming the corpus for a new foundation in Marin.

Nathan: I certainly knew people who were involved in it and was sympathetic to the painful experience that came about for the trustees of the San Francisco Foundation and for Martin and for the staff. It just seemed to me that there was no great purpose in my involvement. I didn't believe that it was going to work out very well for the San Francisco Foundation from the very beginning.

Morris: What gave you that feeling?

Nathan: I have a couple of good friends who are lawyers, who very quickly pointed out the weakness in the San Francisco Foundation case, and it made sense to me. I thought the case was lost from the beginning. There might have been more room for compromise.

If one learns anything from the Marin experience, it has to do with relationship, mutual respect, and community organization. Those are not the issues that have been highlighted. The issues that have been highlighted have been the legal responsibilities. But I think the nature of the relationship of a foundation to its community, and the relationship of a board to its staff were critical aspects here.

My own interests are in programs and social policy. I have never seen the internal struggles of the foundation world as the best use of my time.

Morris: A programmatic approach rather than a legalistic approach.

Nathan: Yes. I see the legalistic approach in terms of legislation that affects all of our lives. I'll put a lot of time into trying to understand that or in developing programs that respond to legislation and its implementation. But in terms of the issues that concern the structure of foundations or the tax base for foundations or the differences between community foundations and private foundations and corporate foundations and then exploring who does what best and why have not been intriguing to me.

Morris: What effect has having an additional large foundation had on the foundation community? As I ask the question, I've realized that in the same fifteen-year period we're talking about the Marin County Foundation may be the most visible one added to the scene, but a number of foundations have been added to the mix over the years. Maybe that's a better question to talk about.

Nathan: In terms of the way we function here, it hasn't really affected anything that we do. It seems to me that most foundations act independently. They carve out their own area of expertise. Occasionally, we cooperate. I most likely could be much better at seeking out cooperation and joining.

There is a developing trend for foundations with large resources to jointly fund major initiatives. It's a good idea, but here money talks. That is quite different than task-force efforts where it's one foundation-one vote. At the extreme it could develop into a two-tier grantmaking society.

The Marin Foundation, although large, doesn't fit into the alliance with other major foundations because of its Marin-only focus. Their structure and the repercussions of their turmoil has given the foundation an identity struggle.

Morris: Is their foundation's board different from the structure of other community foundations?

Nathan: I'm not a student of that. My general observation is that their board members are representatives of various community points of view rather than as Marin residents who are concerned about all of Marin.

Morris: That's an interesting comment altogether when you consider that when you were first working in this field there were John May and Ruth Chance staffing the San Francisco Foundation and Rosenberg, and the other foundations were really not very visible at all in the community. So there's quite a lot of professional development in a generation.

Nathan: I think so, but I think one also needs to appreciate that foundations go through a growth and development phase in the same way that other institutions do. The Marin Community Foundation is in its own struggle of development and growth and will eventually find a more stable future. It's really unfortunate that Douglas is leaving. At the same time I think people who take those jobs in a foundation's transition period know that they're going to be relatively short-lived just because of the changing nature of the organization.

Zellerbach Family Fund Publications

Morris: The other area that we haven't really zeroed in on--we've glanced off it--is the business of your foundation's interest in dissemination of the findings of the projects that you've funded and the technical assistance. I'd like to hear your thoughts on how you got into this publication program--they're really interesting pamphlets--and how they've been received.

Nathan: I was thinking of that in a slightly different context. So much of what we do here evolves, builds on past experience, develops out of one's commitment to the effort and to the individuals who are involved in the leadership of the projects. My guess is that we began to become involved in publications when we wanted to help promote an idea and wanted to give some dignity to an effort. Publication is one way of doing that. It's not the only way.

It's much more than a publication because what it usually involves is the participation of a writer in the project from the very beginning. The writer becomes an extended staff member of the Zellerbach Family Fund.

Morris: As an evaluator? Is it that kind of function?

Nathan: It's someone who's there to help see what is newsworthy, to understand the purpose of the project, to help not just with the brochure, but with the letterheads, with the statements that go out about the project, as well as developing a specific publication piece. Geoff Link and Marjorie Beggs of the San Francisco Study Center have developed an expertise in writing monographs, in graphics and in dissemination. I will include some of our publications to illustrate the support they give to our projects.¹

Morris: Internal newsletters and constituent newsletters?

Nathan: With one of the projects--the Parent Services Project--they've given some help in the internal communication; and with the self-help movement in mental health they've helped with publications.

Morris: A newsletter kind of thing would be essential to that.

Nathan: We'd like to think we're working with ideas that have some implication beyond the individual project. For instance--on Fostopt, which is an adoption option for foster parents, we produced a booklet that was helpful to the legislature in understanding the issues in Fostopt. The publication was also useful to county social service departments by informing them of the way one community--or a number of communities, actually--worked with this new option.

We've always believed that it's not enough to prove that a program can work; that it's necessary to let someone know about it and to be supportive. Brochures were developed that described the program, and then those are disseminated across the United States.

Morris: Across the United States? How many of them are produced?

Nathan: You'd have to get the numbers from the [San Francisco] Study Center. My guess is we produce four to five brochures a year.

Morris: But do you do twenty thousand copies?

¹See supporting documents in The Bancroft Library.

Nathan: No. I doubt that. Most likely, it's a very selected mailing list. Five hundred to one thousand would be maximum. When I say across the United States, I mean we mail publications to selected legislators and to interested programs. Building a mailing list has always been a problem, and dissemination has always been difficult. Everyone talks about it, but it's hard to know how to get your product in the right hands. We need to give more thought to that part of our work.

Morris: Each pamphlet has a slightly different constituency even though they're related?

Nathan: I would say so, because some are concerned with education and others with the child-welfare field and mental health.

Morris: Do they go to the media at all? They are extremely well-written. They're engrossing as writing.

Nathan: I wouldn't say that we're overwhelmed by calls from the media. We do put out press releases and have on occasion held press conferences. Selected publications are sent to columnists.

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Morris: Does the Zellerbach Family Fund have an interest in media response or coverage of the different programs and projects that you're interested in?

Nathan: We're not interested in media response as a foundation unless it is going to be in support of a program. We're very much involved with media with the Task Force for Homes for Children, which is a nine-county recruitment campaign for foster homes and adoptive homes.

Patrick and Company agreed to give free billboard space to the task force. KPIX with the leadership of Nancy Graham, who carries responsibility for public affairs, and Brian Sussman-- KPIX weatherman--has started a TV series called Brian's Kids. That TV spot shows the power of the media. Each week a child who needs a home is presented on the media. The United Way receives 144 phone call responses per week for that child. Now, only one parent can accept that child, but TV has helped to show that there are plenty of prospective adoptive and foster homes out there.

I would say we are interested in media, but we're not interested in media for the Zellerbach Family Fund's sake. We don't need recognition. We need the ideas that are being worked on to gain support in the community.

Morris: But you do see the media as helpful in developing an audience and some participants in this foster home program?

Nathan: Yes. We did have a media committee that John Zellerbach recommended. We held a number of luncheon meetings with representatives of advertising firms and radio and TV stations. It was enlightening to see how interested they were to participate on this committee and to be helpful in nonprofit undertakings.

Morris: That, and also I was thinking that one hears that the media are voracious users of material. One would think that any of these pamphlets would be good feature material full of heartwarming human interest that would be widely used by radio, television, and the daily papers. Is that true?

Nathan: That's generous but rather idealistic. It seems to me that the media aren't isn't as interested in heartwarming, wonderful success stories about a family outreach project in San Mateo County as they are in someone getting run over by a truck by the Salvation Army. It seems to me that that's not what gains listeners. It's a good idea, Gaby, and most likely we could put more effort in on that.

I think that it's only when we've held a complaining news conference or a conference about the tragedy of children waiting six months in an emergency shelter who should be out in two months that there is much coverage. Newspapers seem eager for that kind of press conference. But to hold a press conference or to send out information without news may risk the opportunity of having reporters show up when you really do have something to say. It's not my field, so I'm not the best one to comment on it.

San Francisco Study Center

Morris: How did you connect with the San Francisco Study Center as people to provide the technical side of this effort?

Nathan: They're one of the few nonprofit graphics groups in the community, although there is La Raza Graphics and Public Media Center. We became affiliated with the Study Center because Melinda Marble was one of the Study Center founders. I may have consulted with Melinda, who said that Geoff Link, the director of the Study Center, and she had worked together, and that was the beginning of a very long relationship with the Study Center.

The Study Center began as a research and study group on San Francisco city government operation. Marjorie Beggs or Geoff Link participate on our advisory committees and learn about new projects from their very beginning. Because of this they know about the goal, the progress and the participants in each effort. They have become more and more a publications and graphics service with the capacity for doing research and study. Their graphics work has also improved over the last number of years in terms of its style and presentation. I think that's in part due to the affiliation of Wolfgang Lederer as a volunteer with the Study Center. Wolfgang is one of the outstanding designers in the area, most likely in the United States.

Morris: Is he connected with the Lederer Street and Zeuss East Bay publishing firm?

Nathan: He's not connected there. Wolfgang Lederer used to teach at the California School of Arts and Crafts. He's a book designer and an artist.

Morris: It sounds like quite a coup to have his volunteer services.

Nathan: I think that it has meant a lot to the Study Center.

Morris: Did you put that together?

Nathan: Well, I've known Wolfgang for some time. [pause] He has helped our publications have style and sophistication. The Zellerbach Family Fund is generally involved in from fifteen to twenty projects that we initiate or play a major role in. Geoff Link and Marjorie Beggs attend the meetings of the advisory committees that develop the projects and then often continue to meet regularly with project staff. Their writing reflects their understanding and belief in the programs. They also make valuable comments and suggestions about the projects.

Morris: What have we not covered that you would like to include in this oral history?

Nathan: It's hard to remember back if we talked about the basic philosophy of growth and development and leadership, and how that is reflected both in the lives of people that I've known and in terms of the projects that they've been involved in. So I wanted to talk about that. I think we've talked about regional perspectives, and I wanted to talk something about the evolution of concepts: how one idea builds on another, and perhaps to give some example. I guess I'd like to talk about some of the current issues, as to how one determines and finds that there are issues

--that is, if I haven't already done that. Do you happen to have an outline of what we've covered? If we're redundant, we can just move paragraphs around and put things together in the right place.

Morris: I like that approach better.

Nathan: So we don't care if we talk twice about the same subject.

Morris: No, because the second time around you'll probably come at it from a different angle, which is equally interesting.



XII ZELLERBACH FAMILY FUND PRINCIPLES AND PRACTICE

[Interview 4: July 18, 1990]##

Leadership Development: Grantees, Staff, Trustees

Morris: Do you get to the Berkeley campus often?

Nathan: The other day Harry Specht and I were talking about training people to work in the social work field, and then we talked about the budget in the state of California and the federal budget and the effect budget cuts were going to have on millions of people, and on the role of professional social workers in the coming years. It's difficult if one takes the point of view that one of the roles of social work is to help people find the resources that they need when those resources are not available.

So it's difficult to attract people to social work where they're needed so much, and yet the work in social agencies is difficult and frustrating. Most students seem interested in careers as psychotherapists. Clinical skills are essential to all social work, but there is a need in child welfare and mental health for more generalist social workers to work in emerging integrated-service and outreach programs.

Harry Specht has been of great help to the foundation by his direct participation in projects and through arranging a home base at the university. He's a wonderful consultant and friend.

Morris: Last time we mentioned some things that you wanted to talk about. Do you want to start with the growth and development of leadership?

Nathan: It's a concept that guides the Zellerbach Family Fund and its trustees and its staff and the people that we work with. Growth and development, as I'm thinking of it, is a very personal statement. It has to do with one's understanding of oneself, one's role in society, development of one's leadership qualities,

and eventually with the satisfaction that one gets out of the work that you're doing. I think what is rewarding in this work is to find ways to turn this philosophical statement or this mission statement into reality.

One way to get at that is to look at the change in the lives of the project directors who have been affiliated with the Zellerbach Family Fund. I think first of Mei Lam, and that goes back about seventeen years when Mei was working in the San Francisco Unified School District and helped us to develop a project that we called the New Families Project, which was essentially a psychological welcome wagon for newcomer families in San Francisco.

Morris: When you say newcomer, do you mean just anybody who happened to move to San Francisco?

Nathan: Yes. Anyone who happened to move to San Francisco, whether it was because of business reasons or as a refugee. We would help them reestablish themselves, in terms of their relationship to the school and in finding friends in the neighborhood, as well as in finding volunteer opportunities. The theory was that if a person could feel needed and could pick up where they left off that they would have less difficulty in adjusting to a new situation, in the long run this would be more helpful to their children. Major corporations give this kind of attention when they transfer executives.

Mei was the director of the New Family Project. She did a wonderful job. She received support and encouragement from school administration. Her capacity was recognized by Robert Alioto, the superintendent of schools, who brought her into his administration because of the recognition that she received doing our work. That changed the nature of our project. But Mei's career was really launched in a different direction because of her affiliation with the work we were doing. She later went on to become a principal of the Newcomer School in San Francisco--not the old Pacific Heights school, but the one that is for youngsters who are from China and refugee children--non-English speaking children. We kept in touch for many years.

There are other examples. Another would be Shirley Holder Hazlett of the California Department of Education foreign languages unit, who started the Growing Up Healthy project, which was to implement the state law that required that each child entering school have certain vaccinations before entering kindergarten. Many families did not understand the need for the inoculations. ZFF started the Growing Up Healthy Project to encourage families to participate in meeting the health needs of their children. Shirley went from that project to develop a ZFF

project called It's Your Choice, which tried to deal with hypertension among teens and their parents in the black community. The projects and Shirley were given space at the State Board of Education in Sacramento. Superintendent of Public Instruction [Louis, Jr.] Bill Honig recognized her for her skill. During the process of this, Shirley received her Ph.D. while she was working for us. Again, her life was changed by an affiliation that goes on for some ten years.

Morris: Did she do her Ph.D. in the area of the projects so there was some cross-fertilization?

Nathan: Yes. Her Ph.D. was concerned with family involvement and health care. All that time she was working with us. There are other people who have followed that same course. There's Debby Lee, who started the Early Single Parenting Project--it's now the Support Group Training Project. But Debby also completed her Ph.D. thesis on support groups and self-help groups while she was the director of our project.

Morris: Is that true generally in social welfare training at the doctoral level, that you're working on a real project in the community?

Nathan: No. I think it's very unusual. I think most people who secure their doctoral degrees design a project of their own while they're in the university, with more of a research emphasis. The projects that we have supported have a community service aspect. Research is secondary to the goal of the program. I'm using this as an illustration to say that in one way or another, whether it has to do with a story-telling project or whether it has to do with the development of a curriculum, there has been encouragement on the part of this foundation to encourage the people with whom we work to expand their own knowledge and to develop their leadership capacity.

I think the job we do at ZFF is strengthened by the encouragement we receive from the trustees to increase our own capacities. Linda Howe is an excellent example. Linda is the administrator of the Fund. She also takes full responsibility for working with the Community Arts Distribution Committee. Linda started in a secretarial position 10 years ago--she has gained a depth of understanding of the community-art field. More recently Linda has participated actively as a member of Northern California Grantmakers and currently is the chairperson of the Emergency Loan Fund and is active in the Arts Loan Fund, in the Task Force on AIDS and in the Summer Youth Program.

Many people who start in administrative or secretarial positions in foundations remain with that responsibility. Even

though they may be absolutely essential to the operation of the foundation, they may not be recognized for their capacities.

What's interesting here is that there's the opportunity offered to enroll in classes; there's the opportunity to improve one's public presentation by working with consultants. Linda also manages our Public Presentations program and our Technical Assistance Program in the Arts. We aren't asking any more of our project directors than we are of ourselves. The trustees of the Zellerbach Family Fund established a board leadership-development committee. Although that committee has never fully realized its goal, the trustees play a very active role in our program planning, in our movement towards our mission and as consultants to our staff.

Seeking Broader Perspectives

Morris: Could you give me some examples of how that works?

Nathan: Usually in November or December, we have a program that's presented for our colleagues and friends in the community that deals with a subject of general interest. It may be the privatization movement in public service, it may be in neighborhood organization and design. Usually one trustee of the Fund, a different one each time, picks some responsibility in the development of the subject and in the organization for the meeting. That requires some depth of knowledge of the subject that's being considered. Our trustees either make a presentation at the meeting in the way that George James did with our most recent meeting. His talk is included in the publication entitled "Imperfect Systems in a Changing Society--The Search for Constructive Solutions."

Verneice Thompson served to chair that meeting and made some very important statements of her own. Philip Ehrlich is now working on a program concerned with rediscovering the neighborhood as a resource, and he is immersing himself in that area of knowledge so that he can contribute something to the meeting.

Morris: Does he use a consultant, or is he able to take time from whatever his primary--

Nathan: Phil is in what I would call very active retirement. He has some [law] practice and enjoys travel. He sees this meeting as an opportunity to be of service to the Fund and to be involved in a matter of very great current concern in urban communities. Other trustees use their skills as consultants to work with our project

leaders. In this way they learn more about the project and use their skills in a constructive way. Everyone is contributing what they know. There is a growth process involved in that. It's not like standing pat and dealing with old information.

In another way our staff has participated in a number of different conferences: Tavistock Conferences, where they expand their own knowledge of their role in groups or what's required to gain consensus or to work successfully with other people; the experience enables you to learn about your own conflicts and resistance and something about the resistance of other people to new ideas. When you put all of this together it sounds like a lot of activity. It's primarily a point of view that I don't always remember and don't always use to its optimum. It is an important idea that I think helps us succeed at what we start out to do.

Bill Zellerbach as President

Morris: How about Mr. Zellerbach himself? What piece of this does he take part in or particularly enjoy watching develop?

Nathan: I would say that Bill is the one who encourages involvement, who has a wonderful sense of risk and permits one to take risks, both personal as well as foundation risks, without ever fearing that there's going to be any criticism for one's sense of venture. Bill's all for the kind of activity we're talking about. We have a written policy that says that anyone who has worked for the fund for five years may take up to three months off for a study leave or a mini-sabbatical to refresh their creativity in any way that they can design.

Morris: It sounds heavenly.

Nathan: It sounds heavenly, but sometimes people never reach heaven because they don't know it's there. We haven't had people take advantage of this opportunity, but it is there. I suppose part of my neglect is in not letting people know. We're not that large that there are that many people to let know, and we have changes in staff that make the leave offer more a theoretical statement than a practical one. At the same time the leave policy is there, and it's an extension of the philosophy I'm talking about. We are also so busy and involved that it's not easy to think of being away for a block of time.

Morris: In a sense is the Family Fund itself and the kinds of things you've been describing Mr. Zellerbach's own risk-taking?

Nathan: Our trustees as a group reflect this philosophy. It isn't any single person's vision. It's the composite thinking. It wouldn't happen unless the leader, who would be Bill Zellerbach, isn't encouraging of the concept. At the same time you can encourage a concept and find that you don't have a following. The sense of group dynamic and group purpose is one that all of the trustees can accept.

Balanced Board of Trustees

Morris: Am I right that some of Mr. Zellerbach's children are now coming into the foundation on the board or committees?

Nathan: John Zellerbach is the vice president of the foundation and has been a member of the board for a number of years. Nancy Zellerbach Boschwitz has been a member more recently. The trustees have expanded the board to include the family members so that the family is strongly represented. A majority of members of the board are non-family. That makes for a very compatible and interesting balance. No one really votes family or votes against family. An organization such as this must find a way where each board member feels important and equal.

Morris: That's true of any organization, isn't it?

Nathan: If it's going to be successful, but I don't know if that is really the way it works. There are times when power and authority are vested in one or two groups.

Morris: It's in the literature, as they say, from the beginning, from the PTA level on up to the Council on Foundations.

Nathan: It's easy to make the statement. It's much more difficult to have it work. I think that in typical family foundations this dynamic that I'm describing would not exist. It might be more true of a community foundation. A corporate foundation, with its top down structure of organization, might not reflect a sense of equality in terms of its decision-making process.

Morris: I've heard it described almost as an evolutionary stage in family foundations that there comes a point where for obvious reasons of age and time, fewer family members are active or are involved, and if the foundation is going to continue, it requires bringing in outside members.

Nathan: That may be true. That's not my impression of the family foundations in San Francisco. I think that most are predominantly family members; only a few are broader in their participation.

Morris: Is this something that's been discussed in any of these foundation gatherings?

Nathan: I don't attend the meetings of the family foundations. I don't feel affiliated there, so I'm not the one to ask about what they discuss. But I believe that they are much more tight family organizations. We are family in name and very respectful of family tradition, but we are not the typical family foundation. Zellerbach is close to an independent foundation.

Program Colleagues: Launching the New Neighborhood Initiative

Morris: How about, going back to the business of having programs for the community, who all attends those meetings?

Nathan: That's a select community. I'm using "community" rather loosely. When I think of community, I think of those persons who are members of the advisory committees of the Zellerbach Family Fund: all of those people who consult and who are helpful to us.

Morris: It's the Zellerbach Family Fund community?

Nathan: That's seems a little precious to me. It's for foundation colleagues; for those people at the university who work with us; for those people whose lives touch ours and those whose lives we touch. There may be a mailing list of a couple hundred people, some in education, in social service, in mental health, and some legislators.

Morris: People who tend to share the concepts and ideas of the Family Fund or people you're trying to bring along?

Nathan: Most are rather independent thinkers; to have them share their ideas with us broadens our own perspective. The program meetings that I'm referring to offer our trustees the opportunity to meet the people who are essential to our projects. Project leadership and some of the project staff attend, so that it's an opportunity for us to learn from each other and to have some social exchanges.

Morris: Sounds like quite an opportunity altogether.

Nathan: We try to be intellectually challenging, as well as share perceptions.

Morris: Does it serve also as a vehicle for evaluation of some of the ideas you've been working on?

Nathan: More recently the meeting served as a way of launching a new initiative. The Neighborhood Family Service Organization that we're working on with a number of other foundations, with the School of Social Welfare at Berkeley, the Assembly Office of Research, and the Senate Office of Research. The idea for the legislation grew out of a presentation at one of the program meetings. We had known about the concepts before, but the determination to work vigorously at system change came from a program meeting.

Morris: Because of the positive response at the meeting?

Nathan: That was part of it. I think it created an excitement on the part of people there--some of it positive, some of it cautious. It served as a place to present the concept.

Morris: To the colleagues?

Nathan: There wasn't great opportunity for discussion, but there was an opportunity to confirm and reassure ourselves that a focus on family and neighborhood was worth pursuing. At our next meeting, we will begin looking at what neighborhoods require in order to change the quality of life within that neighborhood. I'm thinking here of neighborhoods that are severely economically deprived.

Morris: Do things like this new building development of the Delancey Street Foundation have a bearing on this concept?

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Nathan: How do you mean?

Morris: They've recently moved into space their own clients built using a lot of donated labor--a complex of buildings--it looks as if it occupies an entire block and the buildings are around the outside of the block, and there's moving-around space inside, and there are workshops and study places and living spaces all in the same-

Nathan: I think some of the Delancey concepts of full participation of the residents in the life of the neighborhood, bringing some economic-development opportunities to a neighborhood, governance of the residence by the people who live there, would be similar kinds of concepts. We are more concerned with the current reality of

families in the neighborhoods using the resources that are there, whether it be a school building or a community center or a recreational facility, as a base for a delivery system that would include an entire range of services from economic development to health services to counselling services to mental health. The NFSO concept brings a unification of what are now categorical services and puts the funds and more of the authority under family influence.

I think Delancey Street sees itself as dealing with a particular illness of the client population. They create a campus and an institution within an area, whereas we're looking at a much broader range of personalities and family styles within a neighborhood. We may both be struggling with new ideas, but I think it's a different expression.

The NFSO sees each member of the family as important and will attempt to use its pooled resources in the interest of family success. In this way it differs from child-centered and school-achievement programs.

Introducing Services During Hard Times

Morris: How does the current state and federal financial stringency, that's likely to continue for several years, relate to the effort to introduce some significant new ideas, given the resistance to change that you mentioned?

Nathan: That's a very difficult question to answer. Just to maintain the morale of those who deliver service and who try to be of some help to those who are deprived of service is a task all in itself. There is an opportunity when there is a crisis to try to find ways to survive and to improve services. Given that there isn't going to be much new money, if any, all you can do is to juggle and change what exists.

I think this situation gives some credibility to those of us who see the need for systems change. It may encourage experimentation in the interest of offering better service, more efficient service, more measurable service. The problem with what I'm saying is that usually change requires some up-front funds in order to make the transition because you generally need to continue the old system while you are designing your new program. There is a role for foundations to serve as a catalyst and to provide some funds for transition. It's not going to be a pleasant situation for people. One tends to talk in terms of the service provider when the real concern is about what's happening

to people whose lives are very directly affected by the changes in government policy. It may be that it will take two or three years to pass legislation that will permit neighborhood family service organizations to be established in poverty neighborhoods.

It's hard for me to see myself sitting here in this very pleasant office in very beautiful surroundings talking about poverty. Yet it's the disabled, the mentally ill, the children and their families who need attention, who are not receiving what they need in society. Now, I don't think for a moment that foundations are able to cope with the tremendous needs of society. We may be able to cushion the impact. It is going to be very depressing, and it's depressing now, but that's the reality we face. Our role is to try to do something within the reality that means something.

[Interruption]

XIII CONCLUDING THOUGHTS; EMERGING ISSUES

Humor and Foundations

Nathan: There isn't much humor in the foundation world. I don't see much. I brought along something that we don't need to talk about a lot, but a group of us back in 1977 began to write a few little jingles at Christmas time about foundations. [See next page.] I thought I just might leave them with you. You might include one or two if there are any that you think relate to the interviews that you've had with other foundation staff or trustees. I'm not going to sing them for you.

There are some songs that poke a little fun at what we do and our style of working. We used to sing those, but we tired--at least the audience tired. I think the problem was that those of us who were writing the music came out of a different generation than those who were being asked to sing them. We weren't able to keep up with rap. Writing the lyrics helped us sustain ourselves and keep our own balance, and it was fun.

Morris: Who were the songwriters?

Nathan: Melinda Marble and Herb Gunther, Bill and JoAnne Somerville, Tom Layton and Ginger, Kirke Wilson and Ann Hoblitzelle, and Harriet. In fact there are a couple of wonderful lines.

You'll find one that says, "Well, what have we learned out of all of this foundation experience?" The song says, "All good steak is rare." That came from Tom Layton. And Kirke Wilson had a very important song to "Rock Around the Clock," which we changed to "Grant Around the Clock."

I can still see Kirke, who I think of as a rather serious and thorough person, hopping around on one foot singing "Grant Around the Clock." There were lots of us whose wives contributed some views from the outside. It wasn't as though the foundation

group were the only contributors. It was the foundation group supplemented by people who brought other talents.

Recurring Human Needs: Responses to Racism

Morris: You touched on the question that people sometimes ask: what difference does it make? Do foundation people feel that they have made a difference, or that life would have pretty much gone on as before if there hadn't been a few foundations?

Nathan: Well, I think we make an immediate difference in the lives of many, many people. I think the difficulty comes with runaway ambitions of foundations--and I'm no different than anyone else. I would like to think that what we do is going to make a permanent imprint on society. That can happen, but it is a rare happening. We tend to not give full credit for the value of immediate help that some people would call charity or "doing for others," rather than the sophisticated view of philanthropy's contribution.

Morris: --of changing society?

Nathan: Yes. And I think that we are not as much changers as we would like to see ourselves. I don't think that depreciates what we do in the immediate scene. The Emergency Family Needs, the loans, the help, the child care--that's important.

Morris: When you've worked from the archival aspect, those are the things that come up again and again. I've been kind of tracking the emergency programs, and they've been with us--

Nathan: --a long time. But you do design ways of helping these programs reach a larger population. Sometimes they become institutionalized either in the training of professionals or in the way a department offers service or in some regulation or legislation that benefits children and families. I think we sometimes don't give ourselves credit because we are not reaching the full sense of mission that we've set for ourselves. I think here we are both pragmatic and attempt to deal with today, what is appropriate for today in terms of racism, in terms of injustice--what can we do about those situations?--and at the same time, look toward changing systems.

Morris: I wanted to ask you what kind of current issues you see evolving, and maybe we could start with racism and race relations. It sounds like you see a change or feel a change.

Nathan: It isn't as though racism and discrimination are newly discovered. In some ways, people can point to more minority success in business and in education. There's an identifiable middle-class Asian, African-American and Chicano population.

Morris: And there wasn't twenty years ago?

Nathan: Yes. I think that there have been statistically some improvements. But then one looks at our inner-city schools and the threat that children feel from each other, the racism that goes on between African-American children and the newcomer Asians or the Chinese. When children can't feel safe in school or on their way home, that is a matter of concern.

I heard only last evening that the media is having some difficult time dealing with violence in the schools as well. Is it fair to identify that a black student beat up an Asian student, or does one just talk about students? We may arrange for some meetings with youth and counselors and the media.

It's an area to explore in a new way. Some people are working to improve relationships through conflict resolution, through peer counselling, through mentors and tutors. It isn't as though we discover something that no one else has discovered. It seems to me creativity is to take the same set of circumstances that everyone else is working with, shuffle them around, and come up with a new way of looking at the situation or a new approach. That's what we'll try to do. We will certainly involve students and their parents.

Offering Hope to Families

Nathan: I think the other issue, which you touched on earlier, is how does society deal with the repercussion of the attempt to balance the budget. Our state budget is going to be balanced partly by reducing services to the people who need them the most: the AFDC [Aid to Families with Dependent Children] mother, the developmentally disabled, after-school programs for children. These are very serious restrictions. I've been wondering, is there any place for a group of foundations to respond to this, or do each of us try to respond in our own way?

I think the revitalization of neighborhoods and the offering of hope to families is a crucial issue for foundations to consider. It isn't just the deterioration of families or the displacement of families or the movement of families across the United States. It has to do with the hope that adults have in

their own lives. To help adults be responsible parents is a concern.

Morris: Because so many people are having babies so early? Is this related to the teen-pregnancy question, or just to parenting in general in an increasingly complex world?

Nathan: It's funny, I don't particularly care for the term "parenting" even though I use it. I was thinking of the kind of security it takes to be a parent. I mean, one needs to have some sense of who they are and where their life is going. Parents need satisfactions in their own lives to offer children the sense of direction that the child needs.

Morris: That's often not something that somebody thinks about before they have a child, though, is it?

Nathan: No. I think that a teenager's having a child is an expression of not seeing the consequences, not having been able to plan for one's own future or see one's future.

Morris: I understand that some teenage mothers see the child as security and stability, a focus to their lives. You and I might think of that as the cart before the horse from our advanced age.

Nathan: You're putting us both in the same category now.

Morris: Yes, in the sense that we are not likely to be teenaged parents.

Nathan: I think you're fairly safe. I don't know that I have thought a lot about teenaged parenting. It's complex, and I think that there's a lot of unconscious determination there. I don't think teenagers are saying that being a parent of a child will make me feel secure and needed and wanted in the world. I think it comes out of impulse and need that the young person hasn't fully understood themselves.

Morris: But it produces, and it has produced, in "society" in general this kind of fervid reaction that "those dreadful welfare mothers are having children in order to get all that government money, and therefore, my taxes are going up."

Nathan: That's just a distortion. People may feel that way, but that is not a correct appraisal. I don't think that the studies have shown that a teenager calculates that security will come in life by receiving an AFDC payment. All that means is that there will be a life of being hounded and controlled and pushed and shoved and living meagerly. Anyone who thinks that welfare is a good deal has another think coming.

I think it's an expression of the failure of our families and our society to give young people the sense that becoming educated and receiving the rewards of education and a good job and an interesting career and security in life are worthwhile--that these are within that person's grasp. I think it's a statement, but I don't think it's a statement of, hey, this is the way to be on Easy Street and to have Mr. Rich support me. The problem is being poor and the downside of poverty for families. It's hard to promote education, health, mental health, when you don't have food and shelter or hope for a better life.

Morris: Then why is the perspective that I quoted so persistent? Is that something that foundations can do something about?

Nathan: I most likely already have been labelled by these statements as a bleeding heart. I don't think foundations as such can do too much. People who are successful try to live their lives untouched by the tragedies that are all around them. One of the ways of protecting themselves from, one, a sense of responsibility, and two, any sense of pain is to accuse the victim of being the cause of their own problems. I think that what you suggest is a genuine attitude, but I think it's a protective one on the part of the people who are saying it.

We've had eight years of defining who the truly needy are, as though there were some who are not truly needy, and there are some people in need who are there because they are freeloaders on society. It's possible to find a few people who have character problems or whose personalities are such that they're going to take advantage of you no matter what. But I can find those people in all ranges of society. I just think that those of us who are concerned about the quality of life for all children and families have to confront these issues with whatever little band we can get together.

Morris: That reminds me of the pamphlet I read in the Zellerbach Family Fund series on Hope for Drug-affected Babies.¹

Nathan: That is an illustration of this philosophy. It may not be the strongest example, but the mothers of the drug-exposed infants were kids themselves at one time with some hope and most likely some ambition for themselves. For one reason or another, their lives haven't worked out. We don't fully understand why they haven't worked out, but we need to. One can approach these women with accusations of "You don't deserve to have a child," "You ought to be in prison," "You didn't take care of your health needs," or one can see these women as having some strength and

¹New Hope for Drug-Exposed Infants, loc. cit.

some hope and longing for the opportunity to lead a fuller life. They are going to need education, they are going to need confidence, they are going to need the new experience of having someone care for them.

Mandela House, along with other recovery efforts, has demonstrated that these lives can be salvaged. We need to know how to intervene earlier before there are not only these tragedies for people, but very costly rehabilitation efforts. One has to decide, are people worth the money either in the beginning so that their lives are better, or are they worth the money that it costs for their--I don't like the term "rehabilitation"--for them to lead fuller lives.

Society has tended to say for the last many years the cost is too high; we'll only pay for what we're absolutely stuck with. That means that society will pay for the most serious mentally disordered; they'll pay to imprison the most dangerous of people; they will pay for the most seriously ill; and they'll pay for those that create the most discomfort for us in society. Society doesn't seem willing to pay for what it takes to avoid or prevent these situations. More income security and health benefits for all people. These ideas sound like giveaways, but in the long run are more practical.

Changes in Economic and Corporate Requirements##

Morris: How does one go about computing the costs?

Nathan: It's difficult to compute the costs of programs that are called health-promoting, but it is not difficult to compute the costs of our failures. That's what our whole system is based on. Our problem is the transitional one, the same one that I mentioned earlier, that in order to get off a train that's headed nowhere and to go on a train that's headed somewhere costs extra money. We haven't found a very good way of doing both of those at the same time. We also haven't found a way to persuade the public that through taxation or revenue enhancement--whatever popular phrase one can use--that this is worth doing. It's not easy to have anyone give up anything that they have, even if they don't need it. There are the resources in the United States to do anything that our leadership and the citizens want to do. The finances are there if the public is willing. The public needs leaders who give clear priority to human values.

Morris: The homeless occurs to me, and the earthquake: is there anything that you might want to say about either of those?

Nathan: My feeling is that earthquakes happen every day. Society shudders, but it takes a collapse in the Marina for people to respond. That doesn't take away from the generous response, but it's easier for people to respond to a natural disaster than a disaster that is created by the nature of society.

Responding to the homeless is humanitarian. But society is already getting a little bit tired and wants a clean-up job. I think we know who the homeless are and know what's required, but that has some of the same components as strengthening families and strengthening neighborhoods and offering hope and offering mental health services when they're needed and offering support to families so that their children have some sense of roots and home in their lives. You can take each group of the homeless and find that in their beginnings there was some great disappointment and some absence of significant relationship. Many lack adequate education and many do not have the technical skills required by corporations.

Morris: --Or do not value themselves.

Nathan: Many families are under economic stress. Kids can't learn, or children have work duties that keep them from seeing education as a priority.

Morris: Are the changes in corporate requirements for employee skills being addressed in any of the projects regarding education? Education continues to attract a large segment of philanthropic money.

Nathan: I couldn't say if that is so. My hunch is that corporations look down the road and recognize their own self interest is involved in education both at the graduate level and at the high-school level.

In some ways I lead a fairly isolated life from what the foundation field as such is doing. I don't have a great deal of social exchange or professional exchange with friends who work in the corporate foundation field. I've become intensely involved in matters of concern here. I'm not a very good reporter on the foundation field. Have you found other people you've interviewed conversant with the whole broader programs of philanthropy?

Morris: No, not necessarily. Most of them are very busy with what they are doing. That's true with most fields.

Nathan: Then I don't have to feel inferior. These interviews are making me feel as though I ought to know more about what's going on in the foundation field.

Morris: What it sounds like, and is this a correct perception on my part, is that the kinds of projects that have been developed through the Zellerbach Family Fund do not overlap much with corporate foundation activities?

Nathan: That sounds correct. It is only where there's been a collaborative effort that involved all of us in the foundation that corporations and independent foundations meet. overlap, it's cooperation.

Morris: Like on the Summer Youth Project?

Nathan: Yes. On the Summer Youth Project, Art Loan Fund, Emergency Family Needs, AIDS Task Force, Immigration Task Force. On all of those, there's been a really good working exchange with other foundations. We're all digging in the same field, that seems to be a large enough field that we don't run into each other too much. That's most likely a product of my own way of working and my own involvement in what I'm doing. My colleagues turn out to be in public service agencies and in social welfare at UC Berkeley. These are the people that I work with most directly and most personally.

Morris: That opens up a whole other interesting idea: if one is interested in expanding one's ideas into a larger field, one might think about placing a few social welfare graduate students in the corporate world.

Nathan: One might. I don't think that corporations have been searching for social workers. That's all they need is someone to come there and suggest--Anyway, that's a nice idea. You can work on that one, Gaby.

Morris: But if the corporation is a paradigm, as it often is--this is a corporate society, and the world has evolved because corporations have promoted this, that, or the other thing. If one were interested in creating a more humane corporation how--?

Nathan: Well, I think there would be a place. There is a branch of social work called industrial social work, where social workers see themselves working in corporations and in unions. That group does have some very excellent leadership. But I don't think the corporations have reached out to that group. A corporation might call in a social worker to consult about personnel, about management organization, productivity, working with each other, looking at those points of stress in a corporation. Verneice Thompson is a social worker and a management consultant. She has helped organizations resolve problems and improve relationships. There must be some motivation for changes.

I think there are social-work skills that can be used in law firms and in large bureaucracies. But I don't think many organizations have seen employing a social worker as terribly cost-effective. It would be interesting to try. Maybe in another life I'll try to sell myself to a corporation and say that I'll pay my way in harmony and increased staff productivity.

Pluralistic Solutions: Building on Past Experience

Morris: Some of the interviews that I've done have been with people who have done a lot of philanthropic fundraising--and they talk about the competitive aspect, like a football team. The United Way, for instance, works on the competitive principle, and I'm told that makes it more fun to go out and raise money if you can raise more money than the other guy on your team or so forth.

Nathan: Is that a social work concept that you're promoting?

Morris: No, not necessarily. But it seems to be a motivating factor in another branch of philanthropy.

Nathan: How do you mean? I'm not exactly sure I follow that.

Morris: Well, the analogy that I was going to ask you about is whether there is a competitive aspect amongst foundation program people. You're working on this and coming up with these good ideas in this field. I'd like to come up with an idea that's better than yours or works better than yours--not necessarily a put-down, but more the "I can play the trumpet better than you can" idea.

Nathan: I think each foundation wants to have the satisfaction that what it's doing is important to someone. I don't think it matters so much if it's a better idea or not quite as good an idea as another foundation's. There is a need for recognition. But usually if you're working in the same field, there is an open sharing of material. I often talk with people who have similar interests. That adds some depth of understanding, but doesn't necessarily influence the direction of the project. Usually, what any one of us is doing has some useful aspect to it. Society is going to take a little bit from what we are all doing. The needs are so tremendous that none of us are going to answer the problems of even one community.

Morris: You see a pluralistic approach continuing to be the way human services develop?

Nathan: It may not be the best way, but I think that's the way it's going to be. It seems to me we've most likely covered the current work that we're involved in, the neighborhood-based family organization, the drug-exposed infants, race relations, and new Americans. Most of the programs that we've talked about can build on each other. It's not as though one suddenly has a new idea that is unrelated to one's past experience. It's experience modified by some new concepts.

The Neighborhood Family Service Organization is an outgrowth of a parent-empowerment project working in the Latino community, helping a group of parents recognize their capacity. It's a variation on AB 3777--the village concept and an individual plan for each client. It's a building process. We work with parent empowerment and parent participation in child care. Then we ask, "What preparation for education are these children in day-care centers having?" We know that one needs to link day care with kindergarten. And you ask yourself the question, "What can we do now that improves on Head Start, that improves on Montessori, that makes the link between day care and kindergarten? How do you help beginning oral-language development?" From this we help to develop a new beginning oral language development curriculum-- B.O.L.D.

You wouldn't be able to formulate a new idea unless you were deeply immersed in the child-care field in the first place. If one looks at most of the work we're doing, one can trace its origins to smaller projects that may have been started seven or eight years ago. Knowledge builds on itself.

Morris: Or more. Montessori has been around fifty years.

Nathan: At least it's a principle here, and we're in a position to learn from our past experience and to build on that. It's very unlikely that there will be any totally new concepts around, although it's possible that the computer age will bring us information that will help us build new concepts. For most of us, it's looking at the old concepts and remodeling, new design, and trying to adapt those to today's society.

Morris: Charge up the batteries and the people working on it?

Nathan: Or to help them look at it--it's like looking at a painting: we each see something different in it. Depending upon one's experience, one may be looking at composition or color or design or depth, and then one free-associates from that.

Ed Nathan's Artwork

Morris: I've been admiring these marvelous drawings of yours on the wall. May I ask how you got interested in producing art? It's got humor and color. You've obviously been experimenting and exploring.

Nathan: It took a lot of bare walls for me to get the courage to put these paintings up. Some of them are from 1985 and some of them are more recent. Some were experimentation with color Xerox. I started painting in '83. I've always been pretty good at public speaking and in athletics and in writing, writing poetry, composing a speech. But I've always felt rather inadequate as far as drawing or painting goes, and that goes back to my very early school experience.

I thought I would like to try again. I read that there was a Chinese brush-painter at the University of California who was willing to teach people who had no ability to paint objects of nature. It was a ten-week evening course at UC Extension. I took that course and appreciated the mixing of materials, which takes me back to clinical work and play therapy with children. I was always very good at being on the floor.

When I finished the introductory course, I continued painting butterflies and flowers. Then I decided that I was just going to paint what came to mind without having to look at an object, and began to draw from my associations. For someone who is not necessarily tidy and neat, working in watercolors is a very great discipline. You either have to do it correctly, or you have to correct your mistake into something else. The creativity is taking the blob that you didn't intend to put there and saying, "What does that look like?" and making something out of it.

Painting has helped me understand artists and the creative process. It's almost as though someone else has painted some of these, as though the mood takes you over, and you work intensely for two or three hours and don't know where the time went. When it's all finished, you say, "Well, did I do that?" So when you say, "Where do they come from," I am not exactly sure, although I could most likely trace the unconscious process in most of these.

Morris: A lot of them have pairs in them.

Nathan: I selected those for the office. If you come to the house, you can see other themes. But I thought since we talk about collaboration and communication, I would bring those here because they did have pairs of bears or pipes or fountains, whatever.

Morris: You even have bears carrying American flags. That's a nice touch.

Nathan: Well, that was for the Fourth of July. It didn't come out of the current flag controversy.

Morris: Oh, no. I was thinking of more the grand new Soviet-American "hands across the sea."

Nathan: Actually, I did that before we went to Russia. Let's see, that was '86--yes, that's before I went to Russia. But I've always liked bears. There were bears in Montana. Those flags you see are Xeroxed. Those little holiday flags and the banners were Xeroxed. I enjoy experimenting with the painting and the Xerox and the color. This one was just a cut-out. I cut out spaces in a piece of paper, ran them through the Xerox, and came up with much different colors than I could have ever have conceived of for myself. So those colors are the interpretation by the Xerox of a watercolor. I enjoy the experimenting. It's nice of you to notice those. The walls here were empty for about eight months. I guess it means I'm going to stay around awhile.

Morris: I think we've covered all the things that I had to ask you. If we've dealt with your notes, we could consider that we've done a good job covering your career and observations on the field. And as we've said before, you get to review the transcripts if there's something that needs to be added.

Post Script¹

An oral history is a once in a lifetime experience and I am grateful to my colleagues for giving me the opportunity to express my views about foundations, the Zellerbach Family Fund and my life in general.

There are some special people and events that were not mentioned in the course of the interviews that I would like to acknowledge.

My daughters Elinor and Ann have been a source of joy and strength to me. They along with Harriet have never permitted me to be complacent or stuffy. They expect me to be modern in my thinking and to use my ability in the interest of helping people.

Both Elinor and Ann live their lives with courage and have made me proud of their strength and their capacity to cope. It's a treat to spend time with Elinor and Ann and with Elinor's children Diego and Natalie.

Helping to initiate the computerized information and referral service at the United Way with the help of Edwin Sarsfield, former manager of social services in San Francisco, was an important event. Edwin had his troubles with Mayor Feinstein but he was a bouquet of rockets in my life. Together we enabled minority staff workers at the Department of Social Services to continue on the job and receive graduate degrees, we toured Japan with Musign, a hearing-impaired group of entertainers who in their way challenged the closet Japanese way of treating disabled persons. It was Ed Sarsfield who first tried to organize the now successful Consortium of Social Service Directors.

Elizabeth Berger of the Children's Lobby and the Children's Research Institute has been a master teacher about life in the legislature. Liz has been a mentor and a friend, introducing me to the legislative process and to decision-makers in Sacramento. Liz fights tenaciously on behalf of children. She's a pragmatist who uses her skills and her contacts very selectively. Her achievements are many but there are quiet victories without fanfare and media hype. Liz is a wonderful consultant.

¹Written by Mr. Nathan in June, 1991, on completion of his review of the interview transcript.

The idea of holding seminars for foundation staff and trustees came to Sandy Close and to me when we were trying to help Sandy solve the cash-flow problems of Pacific News Service. The Zellerbach Family Fund developed programs out of the knowledge gained at Sandy's Seminar on Growing Up White, Growing Up Black and Growing Up Asian. Sandy has the trust of youth and their parents and because of her we have had the opportunity to meet young people trying to work out their lives in the most difficult of situations.

And then there's the large apartment building, 340 Eddy Street, in the heart of the Tenderloin named The Nathan Building. Michael Huynh, the first director of the Center for South East Asian Refugees, and Pam von Weigand of the Indo-Chinese Housing Association were the key people in arranging this honor. I can't think of any more appropriate recognition than a building owned by refugees. Harriet and I try to attend the Vietnamese and Cambodian New Year celebration in the building. The children have vitality and even in the crowded Tenderloin convey a sense that a good future is possible.

It was during the early work with refugees that I first met Patricia K. Biggers of the Ford Foundation. In addition to being a walking research file, Patricia is a helpful and caring person. She has helped with introductions at Ford that have made it easy to share ideas and find common interests. Pat is empathetic and understanding. Her style has helped to give the Ford Foundation a non-threatening image.

Any time I am beginning to feel settled, I make a lunch date with Herb Gunther of Public Media Center. Herb lets me know that I walk on the safe side of the street and tries to persuade me to be bolder. It's a wonder that he doesn't give up on foundations altogether. One can never be too satisfied as long as Herb is around. And maybe that's the way it should always be. Seek out the challenges and only worry when everything seems to be going okay.

I also want to comment on the wonderful time I have working with my colleagues at the Zellerbach Family Fund. Nancy Young, Gwen Foster, Ellen Walker and Linda Howe. We are a great team because we respect and care about each other. We appreciate each other's special talents. We put out a tremendous amount of work because there's no job too small or too large for us to tackle together.

As you know, Bill Zellerbach and John Zellerbach have offices almost adjoining the foundation office. At first I was apprehensive about the closeness. Bill and John never intrude. They help us to create a sense of autonomy. I've come to like the arrangement very much. I enjoy the companionship and the easy access.

Bill and I have become close friends. He looks after me like a father. He makes it possible to use my best skills without getting bogged

down in details. It was a lucky day for me when he invited and then persuaded me to join him.

I've also neglected to convey my profound appreciation for those who join the Zellerbach Family Fund and me in carrying out our mission.

Beverly and Jan have expressed their views on the way we work together. I understand clearly that the foundation wouldn't be nearly as effective without them, and neither would I. There are many other friends and colleagues for whom I feel respect and regard. It is impossible to mention them all.

There may be some risks about developing friendships and possibly losing objectivity.

I would rather have the long relationship, the caring, and the trust and take my chances that we will find the best path together.

And finally, thanks to Gaby Morris for her patience and her ability to be kind even after I interrupted her sentences and questions to the point of my own embarrassment. For the transcriber I only have sympathy and ask for forgiveness for an editing job that will be hard to follow. Being married to Harriet, one of the best editors in the country, has taught me the value of careful reading and clear statements. This oral history falls short of that mark but there is a limit to my toleration for revision.

Transcribers: Caroline Nagel and Christopher DeRosa
Final Typist: Christopher DeRosa



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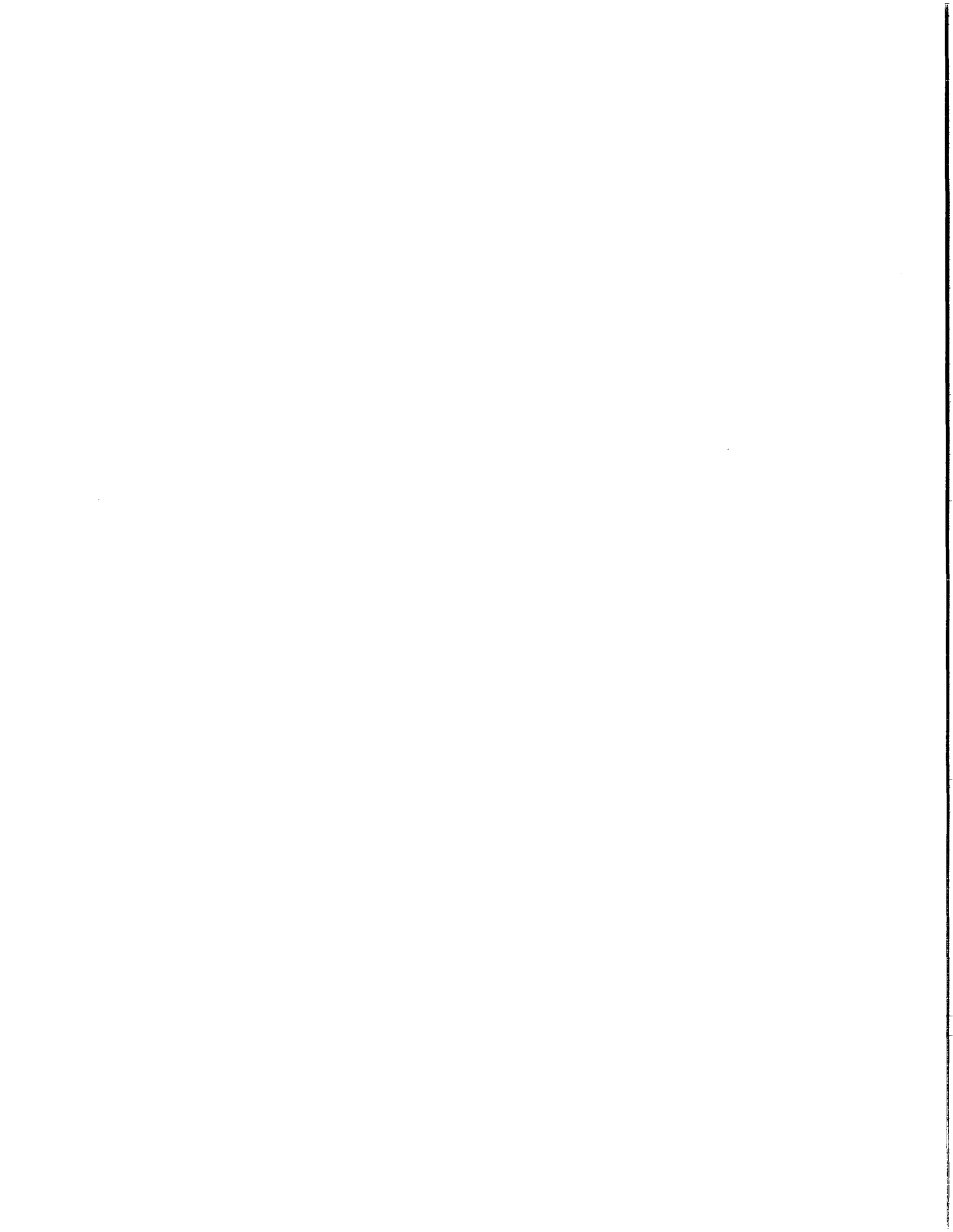
University of California
Berkeley, California

History of Bay Area Philanthropy Series

Beverly Abbott

ON EARLY INTERVENTION AND MENTAL HEALTH SUPPORT SERVICES

Interviews Conducted by
Gabrielle Morris
in 1990



BIOGRAPHICAL INFORMATION

(Please write clearly. Use black ink.)

Your full name Beverly Abbott

Date of birth 11.6.45 Birthplace New Jersey

Father's full name Fred Kliner

Occupation Business Birthplace New Jersey

Mother's full name Verne Dunavan

Occupation _____ Birthplace New Jersey

Your spouse J.R. Elpers

Your children _____

Where did you grow up? New Jersey

Present community San Mateo, California

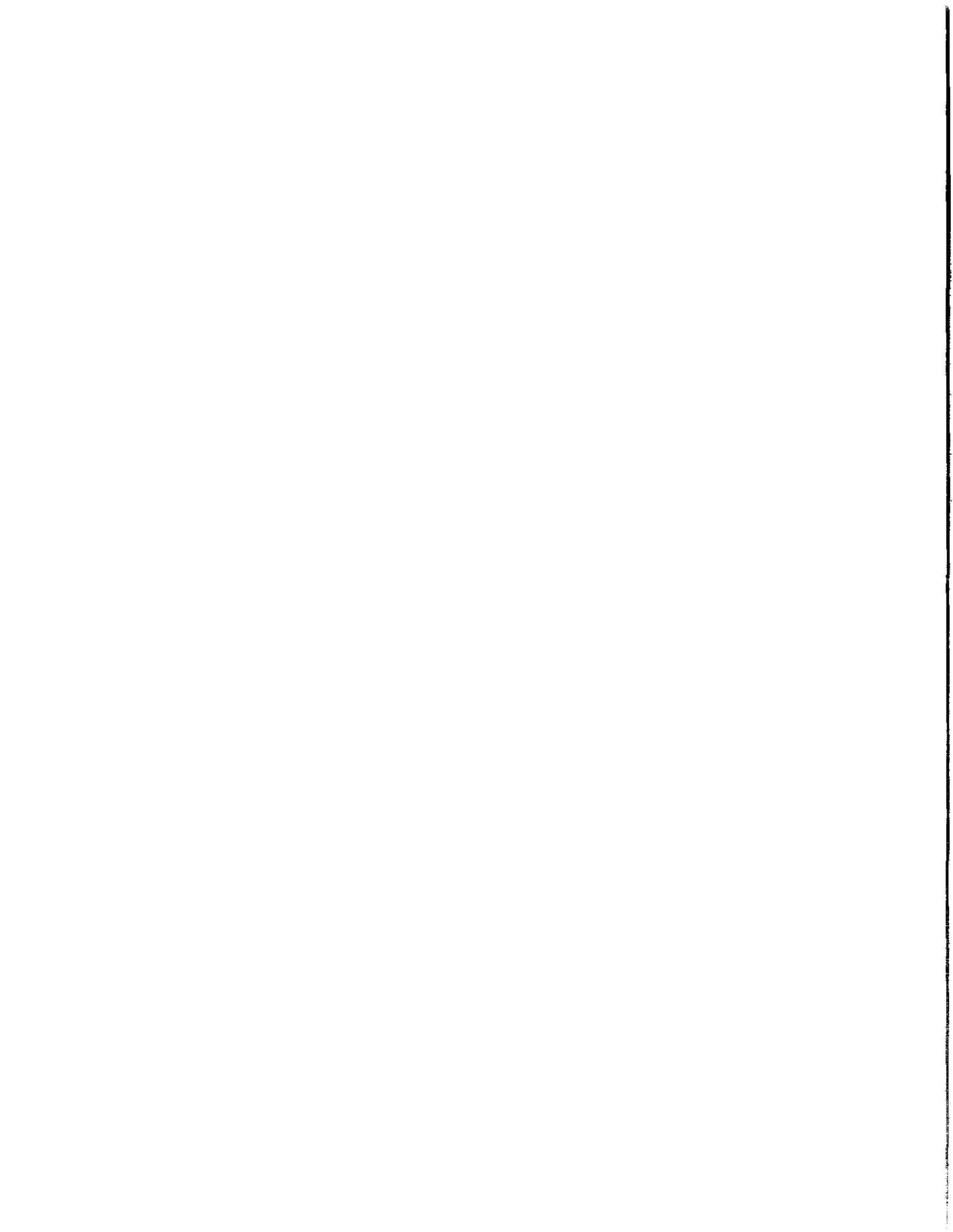
Education B.A., MSW

Occupation(s) Clinical Social worker
Mental Health Director

Areas of expertise Mental Health
Social Work

Other interests or activities _____

Organizations in which you are active _____



XIV ON EARLY INTERVENTION AND MENTAL HEALTH SUPPORT SERVICES

[Interview with Beverly Abbott: May 10, 1990]##

Human Services in Marin County vis-a-vis the Bay Area

Abbott: I was one of the first non-physicians to head a county mental health program, which has been interesting. I think that it was a time when people were ready for some changes. There was a lot to deal with, a lot of physician/non-physician and also structural issues. But you move into the saddle and you go with it.

I first met Ed Nathan when he came to see me about the son of a friend of his. Ed was then on the State Department of Mental Health Citizens Advisory Council [1975-77] and I was chief of the chronic care unit in Marin County. Later he came to visit and said he was interested in getting my ideas about things and that he was going to be administering some of the Buck funds.¹ After he left, I felt like I had had a job interview. [laughter] I thought, "That was a funny meeting." He mentioned the idea of having a think-tank group and asked who might be good contributors. We chatted about that, and then he asked me a lot of questions about mental health, the current struggles, et cetera.

Morris: This was about 1979?

Abbott: Yes. He was working for Zellerbach Family Fund. The San Francisco Foundation had given a grant to Zellerbach Family Fund to administer on their behalf.

Morris: Was the Zellerbach Family Fund mental health committee started originally as a Marin County advisory committee?

¹Beryl Buck Trust, then a component of the San Francisco Foundation.

Abbott: Well, no. It's impetus was the Buck funds, but I believe Ed saw the situation as it truly was: here was a small county with a small population and tons of money pouring into it. He didn't want to be involved in something that was as simple as pouring large amounts of money into Marin County. He wanted to have something that would have broader social significance, and he thought that could be achieved by involving other counties. I think that was why he approached it the way he did. He was interested in Marin; he had to be, because that was a part of the grant, but, truly, his interests were broader. He wanted to experiment in human services in the Bay Area.

His desire to affect public policy was very, very clear, and the idea of public-private collaboration between a private foundation and the public sector held promise. He wanted to stimulate creativity and affect change. My awareness of this potential was greatly increased by this discussion.

In the public system, you have so much pressure, you have so many constraints on the funding, and you have so many rules you have to follow. But if you take some foundation money and invest that wisely on the fringes of the public system, you can really make a change. Over the years, that's what I've seen Ed do, is affect policy by the places that he's put that money. By taking a problem and funding an experimental solution, you get a different perspective on that problem. It helps the system become unstuck and helps you, as a leader to do something different. I think that opportunity is critical for public programs.

The way that I see myself, and I think most decent leaders would agree, is that you are always looking for those opportunities. You're always looking for new things, new solutions. At the same time, you're dealing with a system that is very intransigent, and also you have your own blind spots. The foundation funding serves as a catalyst. Ed and our group identified problems in the system and we discussed different approaches to those problems. Some of the projects that the group funded over the years were very successful, others less so; but always we learned from them and made changes because of them.

Parent Support Services, for example, was a project which I really believed in. The role of the family is critical and the system really didn't address the whole family. By working with day care and children, and with their parents, we could prevent some problems from developing.

A Think-tank Approach to Affecting Institutional Change

Abbott: Ed went around and talked to people and apparently picked people for their role, their background and for the person. There was Pat Jordan, my deputy director from Marin; myself, a mental health director; and Barbara Majak, a public health nurse by background but heading the evaluation unit in Alameda County; Gwen Foster, who was the children's coordinator in Alameda; and Lillian Johnson, who was the chief of children's social services in San Francisco. There were some other people involved in the beginning. And then he's had various staff people and others come. Geoff Link always came. He does work for Ed from time to time. Stella Shao from Marin Community Foundation joined later. There were some other people that came initially. He had a black psychiatrist, I think, from Alameda County. I don't remember his name (it was quite a long time ago) but he didn't stick with the group for very long. Yvonne Carrasco came from the San Francisco Foundation for a while, but she also did not stay. Judy Pope, who was working for him at the time. Now Ellen Walker provides staff support.

Morris: How often did the group get together?

Abbott: I guess we met about once every two months. Maybe every two or three, or sometimes a little closer, depending on what was going on.

Morris: Was there an agenda that people were supposed to do some work on in between?

Abbott: Sometimes, but not always, which is, I think, one of the really nice things about it. There were projects we worked on, but for the meeting itself, we never had formal reports or agenda. Ed's staff people did a lot of that kind of work. The meeting that he held was always more of a think tank. It was not what I would call a working meeting as much as a time to share ideas. I think that's why it's lasted so long.

I think it's funny that it's an evening meeting, because it's the only time I can come consistently. He has another one, a consumer group, which I love to go to, but it's in the daytime when I have my competing responsibilities.

Ed's mind--I love the way his mind works. He has the knowledge of the foundation world, but he also has a terrific grasp of social services, and mental health services, health services, and systems, and how we should put them together.

Morris: As a former practitioner himself--

Abbott: I think his background makes a big difference. He has a depth of understanding that other foundation people don't necessarily have. They ask all the questions and you know how to give all the answers, but it's not the same kind of dynamic process as someone who has a background in human services and picks everyone's brains. Ed will sit at the meeting scribbling on his place mat or whatever, or his piece of paper listening to the conversation, and then he'll say, "Well, it seems like maybe we should try something like this," and he will come up with a great plan. It's a creative energizing process.

We don't have many chances for such discussions. Our retreats are usually dealing with the major current problems. So it has been stimulating, I think, for me and the other people who go, and that's why they've continued to go.

Ed paid us as consultants the first time. I didn't feel like I could accept the money, so I donated it to our county patient fund. I think he was paying other people. The first project that we really got onto--I guess Parent Support Services was the first big one, right?

Parent Support Services Project: Creating a National Model

Morris: There was a support-group training project in 1979, and the Parent Services was a year or so later.

Abbott: Now, the support-group training program might have been some of Debby Lee's activities. There are some ideas Ed brings to the group that he's working on, and we're sort of consulting for him. And then there are other projects which we generated, and we were more involved in. So it's a range of discussion that covers things that he's interested in. He just wants people's ideas about the actual projects we're working on. The Parent Support Services projects, you know, are a matter of getting people together who are involved in day care in the different counties and then talking about services that can be provided to help parents.

I never wrote any proposals for that group, which was great. It was like we were links to the community, so we could identify who was out there working on whatever. For the Parent Support Services project I knew Ethel Seiderman, who had been a dynamite day-care director for a number of years and who, I felt, had a really good sense of some things that we were talking about. Then

there was another woman who was running a center in an area that had a lot of ethnic diversity and low-income clients. Ethel's center was in a better neighborhood but still serving low-income people. Barbara Majak knew someone in Oakland and was able to identify a day-care center, and Lillian in San Francisco.

It was an evolution of identifying people and then somebody wrote a proposal. I think it actually might have been Ed's staff person who helped pull that together. There was a lot of help in making it happen. Having a final proposal certainly wasn't a big issue. If it got written, it got written one way or another, and it wasn't the critical thing. The ideas were well enough formulated and no one was worried about dotting the i's and crossing the t's.

Each program did it differently, but there were certain concepts that were consistent, like having the coordinator for parent services, having parent activities, empowerment of parents, supportive services for parents, and recreation. The Marin centers had better funding, because they were getting their money from the Buck Trust. The San Francisco Foundation also put a little bit more in, and Zellerbach put some in to help spread the project to San Francisco and Alameda. The Buck money could only be spent in Marin. Since that center was better funded, Ethel carried some of the administrative costs in her budget that benefited the other counties. So it was a nice way to package it. And it's still going on.

Morris: Looking at the projects that were listed in here, some of them have been going on for ten years now.

Abbott: Right. They've evolved, and they're stronger. I think three years of foundation funding isn't really long enough in human services, because these are complicated programs with complicated people. Parent Services, I think, is now accepted as the national model, and a lot of good has come out of that.

One of the themes in this project has been consistently that the parents in our society--single parents but also two-parent families--are under tremendous stress because of the complexity of our lives and the absence of a lot of social supports, stable communities, et cetera; the kinds of things that we used to have in our society. So it's building community and supports around a day-care center as prevention. We didn't set it up in the sense of, "If we do this, then we'll have less people in our clinic." It wasn't that direct a relationship, but certainly the implication was there, that people are developing problems out there all the time and we need to help them!

It evolved from our knowledge base of what's going on in our communities, what the concerns are, what the issues are, what we're worried about, what we're thinking about, that kind of thing, not from the statistics or waiting lists.

Child Welfare Advisory Committee

Morris: There was also a Child Welfare Advisory Committee going on. Now, how do you differ? How do you support each other?

Abbott: Okay. The Child Welfare Advisory Committee is mostly social services with one mental health representative on it. Parent Support Services was mostly mental health with one social service representative on it. So, slightly different but linked, communication back and forth. Projects that were being addressed in one would be discussed in the other--just a different focus and different projects.

Morris: When you came down to San Mateo County, was there already a family outreach program?

Abbott: Ed said, "You know, we'd really like to look at this collaborative kind of project." It came out of some of his ideas and some of the things we had discussed in the committee about wanting to see system changes. The thing that's interesting about Ed, and I don't know how he would take this, but sometimes you don't quite know, when you're working with him, whether it was your idea or his idea. Sometimes, he will want something to happen, and he's very clever at getting people to do what he wants them to do. I have an administrative position, but if he wants buy-in on a project, I suddenly find myself articulating his ideas and wanting to try them; sometimes I think it's my idea that he's buying into.

But he has a vision, I think, about the various things, and that comes up from time to time in these projects. It's almost like anything that Ed thinks about or thinks is worth doing, I'm really interested in doing because of having that trust in his background, and his judgment, and his approach to serving people.

He produced a couple of pamphlets about our programs.¹ That was a wonderful thing to do. It didn't cost much and accomplished

¹"On the Move in San Mateo County, Support Team Services for Homeless Mentally Ill," 1987, and "Closing the Service Gap, San Mateo County's Family Outreach Project," 1989, Marjorie Beggs, San Francisco Study Center for the Zellerbach Family Fund. Copies in supporting documents to this volume in The Bancroft Library.

a lot. He said, "I'm going to send somebody down who knows how to write about these programs. They're going to write these things up." Our mobile team was something that we created separate and apart from Ed and this committee and everything else, but when he came down and took a tour of the program--because of our association on the committee, we got into talking about problems with mental health services for seriously mentally ill adults. This was, I believe, '85 or '86, but anyway, we've sent that booklet all over the place, and people love it. The families get really turned on by them, because it really describes a kind of service they want to see. They use it to advocate. Ian [Adamson] has used it to help people understand what his program was about. So it was a great service to provide. I could never go out and contract with someone to do a creative write-up like that. I'd have to spend time looking for someone who could do that. You know, it's just not the kind of resource that's readily available to a public program.

Integrated Services Agency; Impact on State Government

Morris: Did your think tank have anything to do with getting Leo McCarthy's Lieutenant Governor's Task Force on the Mentally Ill into operation?

Abbott: That came out of another effort. That really was Dan Weisburd, who went to Leo McCarthy and got that started. Dan Weisburd is a very strong Alliance for the Mentally Ill member who was a movie producer down in Los Angeles. He went to Leo and talked to him about the problems. You would need to ask Ed this, but my perception would be that Ed's interest in that effort, in being on that task force, was probably there because of our committee. It might have been otherwise if he were off working in another area.

Morris: Ed had worked, I believe, with Arthur Bolton on both the Lanterman-Petris-Short Act, which changed the mental health program in the late 60s and also on AB 3777 recently.¹

Abbott: Right.

Morris: Did Bolton meet with your group at all?

¹The Wright, McCorquodale, Bronzan Act enacted in 1988, which established the neighborhood-based, family-centered Integrated Service Agency pilot project.

Abbott: No. The two were not connected. But Ed used our ideas with the task force work. He talked about it a lot.

Morris: The timing is such that I was interested if there was any connection.

Did your group or any of you on it meet with Ed's trustees at the Zellerbach Family Foundation?

Abbott: We did. Ed asked a few of us to come and make presentations for the trustees. A few things over the years, not many.

Morris: Was this Integrated Services Agency, and the state legislation for that, something that the group was particularly involved in?

Abbott: When the idea first came up, the different ideas about it were discussed--the politics, the service concepts, and things like that. How much of that Ed used or didn't in his own deliberations and thinking, I don't know, but that's certainly something that we discussed a lot. We've talked a lot about the system--what works well, what doesn't work well. We talk about the politics and the pressures. That's part of how I think he uses us, to get that background.

We've also spent a lot of time talking about the pressures--why we don't do preventive projects. When Ed started this committee, I had the distinct impression he wanted it to be focused on mental health prevention [prevention of mental illness]. For the first period of time, we spent a lot of time talking about that, but within, I would say, a year and a half, we were into other things, the fabric of the whole mental health system. What we've talked about is: here's our situation; what are the problems in serving this very difficult population?

One project he funded has been very significant for us. I don't think he had a lot of interest in it, but I asked him for some money to have a family agent program for the parents of the adult seriously mentally ill.

When a family's having trouble with the system, an agent is assigned to work with them. The reason we called it "family agent" instead of "family worker" or "family therapist" or whatever is we wanted to convey this concept: this person is there to help the family with their expressed needs and desires. It was a bridge to the system. Our staff has been a very stable staff. Many people have worked in mental health a long time. The purpose of that program was to bridge our practice from the old belief that families somehow caused mental illness. (People had given up saying that but, still, it takes a while to change practice and belief, even after you stop saying something.) So it was a bridge

project to say, "Let's work with these families in a different way; let's help them with their frustration about getting care for their loved ones."

The project got more and more staff involved. People experimented with new ways of working with people, and it was really successful in that the complaints from the family members have dropped way off. Staff worked with the whole family, even though this person is schizophrenic. It shifted our practice enough to break down some real barriers. Ed put some money in and helped me get a little bit of money from other foundations to get that project off the ground. That's something I don't think he would have done had I not been a part of this committee or group, and had all these ideas not been discussed.

Our board of supervisors, when they saw this family project, got really excited about it. They said, "This really makes sense." They understood it from the community and the consumer perspective. They got really excited about it. It makes a real difference. In terms of the change issue, the creativity issue, highlighting certain issues, yes. It makes a nice difference.

Morris: Do you see any changes in the thinking of the State Department of Mental Health Services or the state legislature as a result of some of these activities?

Abbott: For example, the booklet on mobile support is a small thing.¹ But we sent that to [Assemblyman Bruce] Bronzan who funded the homeless. When he got it, I think he really thought, "This is what I wanted my money spent on," and he wrote a very nice letter. It's that feedback loop, "Yes, if you put public money in, it goes for programs like this which are really good." That booklet, I think, had an impact.

Another thing is the Parent Support Services Project--I know that they have done presentations to legislative staff and other people, and that's had some impact. From talking with people in this committee and serving on the AB 3777 advisory committee, Ed probably feels more grounded than he might feel otherwise with all of that knowledge to draw on. He has talked to us over the years about the things that he's worked on. It's always hard to assess what really influences what, but I know it's made a difference in local public policy and some state policy.

There were several AB 3777 pilot projects, and those were funded. Some of the concepts are out there anyway and being

¹"On the Move in San Mateo County," Support Team Services for the Homeless Mentally Ill, San Francisco: Zellerbach Family Fund, 1987.

worked on by people who didn't get funding through the pilot. Ventura got a major county program, and Stanislaus got one. Long Beach got one, and there was one other. But the AB 3777 project was a combination of several things. It was a Republican bill that came out of the Ventura County project for children, for one thing. We had worked on that. That was blended with the McCarthy task force effort. Those two things were blended together. So you had a county demonstration project on this Republican Ventura model, and you had the McCarthy task force projects that were funded in that model.

The Bay Area counties didn't compete for a number of reasons. The county project, people felt, would probably go to Ventura. And on the McCarthy projects, for our own program, we just weren't there. We had some internal disagreements between two of our key staff. It wasn't going to come together. I think our product would not have been what it needed to be. That's not the way to put together a demonstration project.

Putting Hope on the Agenda

Morris: What are the things that are emerging that need some attention, now that some progress has been made in some of the other concerns?

Abbott: You can pick any area. I think that our social policies have come home to roost with the number of people with alcohol and drug problems, the number of people in our prison population, et cetera. That's all come home to roost, so you can pick almost any area. What generally happens in our Zellerbach committee is Ed picks the area, unless there's something one of us brings up. If we say, "Hey, we really want to try to do something about this," Ed follows up. But some of those are thumbs-up with Ed, and some are thumbs-down. [chuckles] It just depends.

I think the greatest thing one has to fight, when you're dealing with a lot of human problems or with the public sector, is inertia, or that feeling of hopelessness. I think that in order to move public policy forward, you really have to hold out hope to people who are working in the system--also to legislators and other people--because what they're mostly in it for is to do something good for people. What Ed's committee does is it puts hope on the agenda, and you get a chance to really move forward.

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History of Bay Area Philanthropy Series

Janice Mirikitani

ON THE COMMUNITY ARTS DISTRIBUTION COMMITTEE,
ZELLERBACH FAMILY FUND

Interviews Conducted by
Gabrielle Morris
in 1990

XV ON THE COMMUNITY ARTS DISTRIBUTION COMMITTEE,
ZELLERBACH FAMILY FUND

[Interview with Janice Mirikitani: May 17, 1990]##

Glide Memorial Church Creative Programs

Mirikitani: I've worked at Glide for twenty-four years.¹

Morris: Have you been doing this kind of community outreach through the arts all that time?

Mirikitani: Well, I don't separate Glide from the rest of the work that I do, because I think Glide is a very integrating movement. Issues, life goals, and talents are able to coexist on a mutual or simultaneous level.

I think giving is really the key issue, and I guess my best teacher was my husband, Cecil Williams. He's the minister here at Glide, and he's probably one of the best preachers around. I'm a little biased, of course. But his ability to transform people, I think, has to do with his ability to give and to take risks.

I think that that's what Glide has encouraged me to do, to bring all the different elements of myself and those areas that I'm strongest at to the job. That's what we encourage in most people here. We identify the strengths of the staff, their passions, their desires, their needs, and we provide the environment, hopefully, by which they can create out of fulfilling those strengths. It's very difficult because I think it's very intimidating. There's such a thing as too much freedom without the necessary boundaries. And to know

¹Ms. Mirikitani became program director at Glide in 1974 and president of the corporation in 1982.

when to define the boundaries and create them and to provide them for people so they can, in a structured manner, most creatively produce is a very difficult thing because it's very individualistic.

There's no "formula" for any of our programs. Each program is very different and the arts programs are nontraditional. We used to have a writing program here which involved primarily people off the streets. I think the beauty and the danger of "street" writing and "street" poetry is that we invite life in--raw--without the "safe" conventions, without editorializing or judgment. You encourage people to write--they might not be literate, or they might need technical assistance; people who have skills but need improvement--Okay? People who have fantasies about being playwrights, and have only written a page; we have to start there and encourage that page. Some very phenomenal things happen out of that one page. Some phenomenal things happen out of taped interviews that I would conduct with ex-junkies or gay prostitutes--you know, the phenomenal stuff that happened out of their lives. The honesty--the authenticity--of their life was what a lot of the Glide writing focused on.

I have been the director and choreographer of the Glide dance group for over nineteen years. Again, the messages, the art, comes from the people who dance their lives, their stories--and our concerns for peace, for justice, for equity. The Glide theater group is based on the same structure and philosophy: that we are part of a movement to bring about positive change.

Originally Glide was structured in such a manner that many of the programs that were created here, funded through Glide, took on lives of their own and then became independent entities, like Huckleberry House, like Baker Place, like Hospitality House; they used to be Glide programs. Intersection for the Arts was a Glide program. Glide Publications is now Volcano Press. The Sex Forum is now a national institution. Glide provided the kind of ground, the field--you know, you could envision it like a large farm where you have corn growing in this field and chickens over here. The programs took on a life of their own and became quite free of us. Like children, they grew.

Cecil became minister in 1964. We restructured Glide to unify the church and the Urban Center--I would say that happened in the early seventies--then our priorities did change very much toward human services.

I think I met Ed Nathan in the mid-seventies. Ed approached me about this idea that he had (and he's been a very ingenious and very innovative force in the foundation world for years), this idea that the Zellerbach Family Fund, which was doing some wonderful things in the area of family and children and education, wanted to do something in the arena of arts in the community and that this fund could have a portion of it designated for people who are active artists or who are artists from multicultural communities to determine how the funds should be allocated. That was a very ingenious, innovative, and very effective, certainly, and risky idea.

By the time Ed and I met and we talked about community arts, I was moving from administrative assistant to program director, and I had already edited and published several anthologies and had one of my books of poetry published.¹

We had created several art programs here at Glide from the events and programs responding to the hippie movement, the convergence of flower children and runaways from all over the country in the Haight-Ashbury district of San Francisco. We had a celebration of birth for the Summer of Love--an art festival here in the parking lot of the church, which was unheard of, to have in a church; bands played, to the dismay of many of the elderly who lived in the neighborhood and the big chain hotels because of the amplified sound. They set up a "free press," that printed instantly poems from the street --that contained not the most desirable language for a church to be associated with. [laughs]

By then, Cecil had already made revolutionary changes as minister of Glide--like removing the altar and cross, firing the four-member choir, and bringing jazz music back to the church, changing liturgy to include contemporary poetry, inviting controversial speakers and celebrities. The few members who had resisted an African-American minister being appointed to their church in the first place (Glide had, just before Cecil was appointed, approximately 60 members and they were all elderly and white) left with indignation and self-righteous scorn. Of course, the multitudes of every hue and class, age and religious background filled the pews in their place.

¹Time to Greez! Incantations from the Third World, Janice Mirikitani, et. al. eds., San Francisco: Glide Publications/Third World Communications, 1975.

Third-World Artists' Experiences and Philosophy

Mirikitani: I was a part of the creation of Third World Communications, also, which was a collective of Third World writers and musicians and playwrights and dancers. Ntozake Shange, who wrote For colored girls who have considered suicide, when the rainbow is enuf, was part of that collective. I'll give you the book that came out of this, Time to Greez, the first anthology that we know of on the West Coast that was published specifically for Third World writers.

The other anthology that I was a part of was called Third World Women, and that sold out immediately. I mean, that was gone, like, in six months. Unfortunately, no large publisher would pick it up.

During the San Francisco State strike in 1968-69, I started a cultural magazine called Alon for Asian-American voices. That became part of the Third World Communications Collective, and there was a Hispanic/Latino/Latina publication, similar in focus in terms of being cultural, political, and self-defining. The civil rights movement generated so much of this need to affirm our ethnic identity and the need to define who we were--who we are--after what we felt so many years of trying to be white, self-hate, and trying to be who we were not. A revolution of authenticity was happening. This groundswell grew in our books, our voices, our art. We were able to express many things that were hidden, unspoken in the past.

I think that people of color cannot separate or fragment themselves in their expression--we cannot separate the political from the spiritual from the artistic. It is an age-old discussion: What is political rhetoric? What is real art? that we've had in the arena of writing: "What is political? What is rhetoric? What is art?" We have been made to believe that we must fragment ourselves from our families, our communities, from the expression of our history and our experience and from our own selves. I believe that is a very Eurocentric process of thought and action: that intelligence means to be rational, academic, and analytical. So we kill the feeling from thought.

We are the sum total, the synthesis of our experiences. We as people of color cannot separate our economic status from our racial identity from our class background and our cultural

roots and the spiritual means by which we have survived oppression and racism. I am a writer who reflects my experience as an Asian-American woman from a poor farming family. We, my immigrant ancestors and American-born parents, are survivors of a hostile country who incarcerated all of us --citizens mostly--in concentration camps for no other reason but race. I can't intellectualize that away from my art.

I have to raise the question: What is American culture? It seems it would be an inclusive culture that reflects all of us--hyphenated ones as well as indigenous ones or especially the Indians--and that diversity/multi-culturalism would be the dominant expression. But we--I mean Asian Americans specifically now--are still perceived as exotic and foreign; alien and non-English-speaking, regardless of the many generations we have dwelled here in America. Multicultural groups and organizations deserve to be given the kind of financial encouragement to continue to create, experiment and be innovative and to expand and be supported as American art.

Philanthropy at its best (and what I think Ed and Bill Zellerbach and the board attempted to do) was to ask how their support could be extended to multicultural groups--how the void could be addressed. How does philanthropy extend itself to the underserved and underfunded? Obviously, no one source has enough money to address the problems, but certainly Zellerbach took the position that they could create an environment of encouragement. Leverage. Breaking the isolation and wall of invisibility around a group. If other funding sources can see that Zellerbach is willing to say, "We believe in you enough to give you a seed grant," or, "We're willing to support this project for a couple of years." That does give credibility. It creates a support system. And that certainly is important.

CADC Effort to Redress Inequities

Morris: Looking at the lists of foundation grants, you see that the San Francisco Opera gets \$300,000 to put on a new opera or the ballet gets \$200,000 from the National Endowment for the Arts. How does that relate to \$3000 and \$5000, the usual size of grants for neighborhood arts groups?

Mirikitani: Oh, I have some really strong views about that. It is an obvious statement of the disparity--not only in perception of importance but in established, age-old support. I believe

that what Ed had in mind, and the purpose I came to the Zellerbach Community Arts Distribution Committee with, is to begin to look at how to address those inequities. It's such a huge, obvious difference that it seems impossible, but we start where we can.

There is really no way we can make a fair comparison between the established "traditional" arts organizations, such as the ballet, the opera and the symphony, and the small, multicultural organizations. It is such a complex situation. I'm not saying, either, that the large ones don't deserve what they receive. They are part of the establishment, society's perception of its civilization, its refinement and the definition of its "culture." Let me say that I believe that the term "traditional arts" attributed only to the opera and ballet and symphony is a misnomer--many forms of multicultural art, such as Noh theater, haiku, Chinese opera, etc., are traditional. [chuckles]

Well-endowed organizations with large budgets have many, many more resources available to them, both private and public. Money begets money in this instance. They do have large marketing and publicity budgets and can invest in capitalizing their product. They become the in thing to support. Also safe. Institutional racism makes it difficult to break the stereotypes about multicultural arts--that they are not "universal" or accessible to the broader public. They are stereotyped also about being relevant only to one community and are not publicized or are misrepresented.

I'll use a non-arts analogy like the Red Cross. If a donor is given a choice, they will often send their charity dollar to established institutions like the Red Cross over a smaller organization that is doing monumental things for poor people or during a disaster. But the perception of many people is that the Red Cross is the one that will get the job done and is credible; they are easy to give to, and there is a certain prestige built into being a donor to these large organizations. This is in no way knocking the Red Cross, which does fine work. It is simply to make the point about where the donor dollar goes.

I would like to think that Zellerbach dollars--however small in the overall picture--make a difference because they help change, or create a new perception of, multiculturalism. That's almost as important as the money itself. What Zellerbach is doing is to make the statement, "I believe in you--I'm willing to invest in you. In helping to provide credibility as a major philanthropic source, perhaps the NEA

or the CAC will notice and this small grant can help leverage more money from those other sources."

Morris: Have the smaller groups had better success raising money once they've received a grant from the Zellerbach Family Fund?

Mirikitani: Absolutely, absolutely. Just knowing how I respond, you know, I look at this group, and I say, "Well, I've never heard of this group," because you're not expected to know everybody. And you look at their proposal and you see, "Oh, So-and-So Foundation gave them two thousand dollars, and So-and-So Foundation gave them that. And they've got a pledge from Such-and-Such Corporation for this amount. Well, certainly we can invest, or take the risk to invest."

Group Decisionmaking

Mirikitani: Now, the beauty and the genius behind Ed's idea on this, of course, is that he got people like Roberto Vargas and, originally, Margie Jenkins, and Lester Jones was one of the original members in the area of theater, and myself.

Brenda [Way] came on after Margie, and Brenda's wonderful. I mean, she's just incredible. She's very knowledgeable and very, very perceptive. Her perspective is very broad. She has the ability to project a picture of the long-range health of certain groups, which is also true for Lester and for John [Santos]. John is the expert in music.

Alfonso Maciel was the visual artist on the committee, talented, knowledgeable, and responsible. He's such a good friend. He left the arts board because he had so many other priorities, plus he was getting married and starting a family and all of that. But he was so perceptive, brilliant, and wonderful to work with, and just so fair.

I have to say that about all the people who are on this committee. I've never worked with anybody who wasn't fair, who didn't listen, who didn't look at a group and--no matter what we felt personally about it--put those feelings aside and say, "Okay, based on the realities that exist, what is the fairest thing to do?" I mean, it's just fabulous to be able to work with a group like this, a group that you can really learn from. This committee brings out their honesty and their authenticity--there is so much that you gain from this.

It's also been very educational for me to know Susan and Tom Silk, and Tom Layton, and John Kreidler, and, of course, Ed. Ed is a real visionary. He's a man who creates for his time. He's really taken the whole arena of philanthropy, the whole world of private giving and, by what he does, shown what can be done and expanded that world.

On the whole, I think, private philanthropy is a very small, narrow-viewed world. I think it's because it's based on family money, and everybody has their own pet projects. I think that small organizations feel like they have to go through incredible hoops to get the money. I mean, it feels so inaccessible. I feel that many foundations are out of touch with what's going on, in terms of real issues. I mean, there are certainly wonderful, innovative people who head foundations, who are on the boards and who are the family, if you know what I mean.

Bill Zellerbach is a rare exception, a wonderfully compassionate person. And I don't want it to sound like I'm just trashing all foundations because certainly I'm not. I'm saying that, on the whole, I think, people feel that foundations are pretty inaccessible.

Encouraging the Jewels that Make San Francisco Great

Morris: How did you go about making decisions in the beginning and letting people know that there was this program that had some community input?

Mirikitani: I don't really remember. In terms of, like, press, or a reception? I think we let some of the organizations that existed, who we all knew, know about it. Word spreads very quickly. It just really does.

I think that the need was already made clear. Ed's background and knowledge certainly was seminal. He worked with the Hotel Tax Fund, I think, helping to change its priorities. He's the genius behind the Ethnic Dance Festival. You're dealing with a person who has got some incredible history here. Before I knew him, he was doing some really far-out stuff and really being in touch with the people who need and who were not well-known. He's going, "Hey, look at this gem over here!" You know, "Hey, look at this little diamond over here."

He was mining the precious stuff out of the ground and saying, "Look at these jewels that we have in this city. This is what makes San Francisco great. This is what makes San Francisco so unique." It's not just the symphony, the opera, the--you know--and the patrons of those. It is also the Western Addition Cultural Center, Wajambe Dance Group, and the Mission Cultural Center, and Galleria de La Raza, and the Japantown art movement, and Chinatown Cultural Center. Look at all these wonderful gems. Look at all these little teeny groups that are breathing and are needing a little extra oxygen to help them get beyond the one-lung stage [chuckles].

And I think that that's what we did. The example that I use is the Bagong Diwa, which was a small, three-member Filipino dance organization whom we gave two thousand dollars to. I'm not saying, "*We did this*," but we gave them support for two or three years. Through a variety of personnel changes, there are now two major organizations that have emerged from the people who we supported.

We've encouraged collaborations, which I think are great. It's a real growth situation. I've learned a great deal from collaborations because I've done them with Asian American Dance Collective and a variety of other multicultural artists. There's so much energy that one gains and so much broadening of artistic vision that one gets from other artists that I think it's very enriching to do that. So we've encouraged that. We've encouraged, for example, three organizations sharing an administrative assistant, or sharing a fundraiser, or sharing a marketing person, or sharing a promotion person. Because they're doing similar things or share a common medium, it felt like they could share that resource or they could share the funding for that resource.

- Morris: Is the goal within small arts organizations to move into the larger organizations? To move on to the opera or a national dance company?
- Mirikitani: I think that if you're good, and if you present good work, and you're consistent, you cannot help but grow into something that is larger, like ODC [ODC/San Francisco, formerly Oberlin Dance Collective], for example. Like Asian American Theater Company, for example, that grew from a small theater and then got its fame, really, from one person, like Frank Chinn, who is a well-known playwright. And then it kind of faded out, and then it came back, and through the monumental efforts of a number of people, it's grown into a major theater for the Asian American community. It's the only theater for the Asian American community but it presents very good quality work that

has a universal appeal. Now, it's attracting larger funding, and I think that that just is a natural growth process. The process occurs like that.

Institutional Barriers: Varied Visions

Morris: For instance, some of those plays and actors may eventually go on to ACT or Berkeley Rep or something like that?

Mirikitani: I don't know. I think institutional racism is very strong and alive, so I don't think that you're going to get [chuckles] many of your composers, for example, to be presented at the symphony. [laughs] That's not going to be your usual thing. I'm not even sure that anybody's goal is to do that--artists are so individualistic, and they're so uniquely themselves. They're not saying, "Okay, I want to be Wagner." They're saying, "I want to create the art that is authentic to me and that is my vision." Hopefully it grows into something that is great.

Let me take Ntozake Shange as an example. She was part of this Third World Women's Collective that sort of ad hoc, informally grew out of the anthology that we did. So we, as women, went around and did various poetry readings. Hers were performance pieces, which inspired many of us. We did a lot of readings in coffee houses, benefits, and she did some performances for television. She wrote this phenomenal play called For colored girls who have considered suicide, when the rainbow is enuf, and it became a huge hit, okay? Sure, you dream of that. You dream of that.

I believe Ntozake writes from her authentic soul, and she has a message that the world embraced. That's what you as an artist hope will happen. Speaking for myself, I couldn't write with the goal of "becoming famous." Hell, I'd have stopped writing long ago, feeling like a failure. I believe writing requires itself to be written. We are compelled.

An argument that exists in the multicultural communities has to do with "acceptably successful," therefore "sellout" art. Bottom line for me is that no matter what the view might be about any segment of society, there should not be so few of us that he/she becomes the "spokesperson" for the race, nor the token for white folks' "affirmative action" for us; nor

should the individual become the object of divisiveness in our own community. Do you understand what I'm saying?

Institutional racism is so insidious and pervasive; it lives in media images we see everyday or too frequently; or on the other hand that we don't see (ourselves) at all. With the racism of omission or one-dimensional stereotypes, the message of mainstream American is that we are either invisible or not human.

James Clavell's novel Shogun is a bestseller. The hero in his novel made it to a movie special which presents him as being superior (in swordsmanship, intelligence, good looks and the ability to get the girl) over the entire male Japanese race. Toshio Mori's heroes and heroines are not made into movie specials nor are Hisaye Yamamoto's or John Okada's or Louis Chu's or Carlos Bulosan's.

In Taipan, the movie, Joan Chen is an extremely exotic concubine whose limited English lines are reduced to, "I feed you, I give you pleasure because it pleasures me," spoken to her British colonizer while she wipes his body with hot towels. The perpetuation of these stereotypes gives actors and actresses roles in major films--as distasteful as they are to them and to us--and I can't knock the player for earning a living, but I must raise the question: Where's the balance? Where are those roles that speak English or are fluently bilingual as we really are? The portraits of us as scientists and astronauts and inventors and playwrights and poets and teachers and people who have real lives and who marry and have wonderful children who speak only English and are as American as my Irish neighbor? Where are we?

Board and Staff Diversity: Financial Parity

Morris: Did the Arts Distribution Committee get into the discussion that's been going on about some of the larger arts organizations not having very many Third World people on their boards of directors?

Mirikitani: We, officially, as a body did not, but as individuals we certainly have been involved with the discussions. I serve on the Grants for the Arts Advisory Committee of the Hotel Tax Fund. As a public fund, they have been addressing that issue directly, though the response from the "majors" has been slow. Steps have been taken but certainly not as many as I think

could be taken. Changes occur slowly, don't they? Personally, I think power is very difficult to share or let go.

I am cynical about the effort. I don't have any illusions about the opera or the symphony or other "established" institutions changing the complexion of the power or even sprinkling it. Nor are people of color going to rush to fill positions of organizations they feel alienated from and they're going to want to make decisions about. I have no concrete recommendations other than a blanket unrealistic one (like open the process for hiring and implement meaningful affirmative action plans above custodial levels) and to continue to advocate and participate in whatever processes can be created.

The population in San Francisco is 60 to 65 percent multicultural. We have an obligation to hire, to include people of color in our programming staff, on our boards, on the artistic staff. I mean, that is what we want from an ideal world. The effort should be made.

Of course, the liberal argument is, "Well, hey, art is blind. Music is blind. When you're listening to music, you don't ask whether the violinist is Asian or black or white." But because you know that the inequities exist, you have to make a conscious decision about inclusion. I think affirmative action does not work because the will is not present. The intent is not genuine. We cannot take the sickening position, "We are all alike, I never judge by skin color;" and "Some of my best friends are--"

Parity is a conscious struggle. If we are genuinely concerned about parity, equity, we must include those who have been omitted in the process. That is very difficult. If you receive public funding and you have a \$10 million budget, you are obligated to implement parity, to take affirmative action in regard to your staff. You must include those who represent the diversity of the taxpaying citizens.

I hope we can be part of the dialogue. Certainly, I think that there is distress that the issue of parity is not being aggressively addressed in terms of funding. So when you look at the proportion of money that's being given to the larger organizations and compare that with what's being given to the small organizations, the chasm is huge. But if you look at the percentage given, it's like, 2 percent of a million dollars is infinitely more than 25 percent of a

thousand dollars. I'm not sure that we can accomplish a catch-up thing within the given context of rules that abide. So, in regards to the city's Grants for the Arts Fund, I think we have to question the process that exists and the representation of those who make the decisions.

Technical Assistance: Funding Collaborators

Mirikitani: I also don't believe in throwing money at a problem, either. I believe that you can act responsibly without doing that and still provide the kind of support that groups need. It means that on a very well-thought-out, total perspective, you look at whether or not they have technical assistance support, whether they have capital needs, what kinds of shared resources there are available. So it's not just money. I think that it's a total view. How can you assist, for example, in publicity or how a group is marketed?--you know, those kinds of questions.

The Performing Arts Technical Assistance Program, again, was Ed Nathan talking with Misha Bernson, about five years ago, after the issue of technical assistance emerged from one of our meetings. Again, Ed, the innovator, pushed for additional funding to be granted to "experts" in certain areas who would train and assist groups weak in specific production aspects of their projects, i.e., lighting, movement, mask making, et cetera. Misha is a writer, theater expert, and consults on many projects. She has a wonderful, broad view of community arts and was brought on as Zellerbach's consultant to coordinate the whole technical assistance program. This was an ingenious way to involve individual artist/experts to train/teach and collaborate with arts organizations who need the assistance so badly, and provide a means for these artist/experts to receive a stipend for their work.

Morris: Has there been any discussion about increasing the amount of money that is available to the distribution committee?

Mirikitani: I don't want to sound like an Ed fan, okay, but I do think it's a testament to Ed's capabilities for networking and communicating, et cetera. Because, again, Susan Silk and Columbia Foundation are part of this committee, contributing to the pot of the fund. Gerbode and Tom Layton are also similarly involved with a portion of their grants. It's not just the increased amount of dollars available, it is also

having Susan Silk's knowledge or Tom Layton's perspective contributing to this committee's total concerns.

I think it is Zellerbach saying, "What are the increased needs, and how can we come up with the (limited) dollars to address some of those increased needs?" Collaboration and partnership from all sectors have become a necessity. It's just great that those whom we relate to and have these "collaborations" with are compassionate, sensitive people and our relationship is based on respect and mutuality.

Susan and Tom are very strong. They don't vote, but we recommend to them. I mean, you don't tell Tom Layton or Susan Silk what to do. [laughs] But it's really a privilege to be able to hear them, argue with them, and agree or disagree-- with humor and serious respect, with laughter and intensity. They're so open, and that's a marvelous resource, a *marvelous* resource.

I understand other funders have wanted to come and listen in, just to experience the process. There's no structured thing: we don't say, "Okay, we're going to talk about this first and not deviate." We go at each proposal, and what arises out of it is just what emerges out of our mouths and what our knowledge is of the groups. It's phenomenal what happens. Lester may come with his unique view of it, from a theater person's perspective. I may, from a writer's perspective, come with something, or I may know something personally about an organization or artist. And Brenda, with her vast range of knowledge, not only in dance but in multi-disciplines. And John Santos is extremely knowledgeable in music. From all these different perspectives, the whole group may get impacted with all of these views, and what emerges out of that can become a policy statement for the arts. I mean, it's pretty incredible.

What I miss is that now we're getting such huge stacks of proposals that I feel like we're rushing through a lot of it, because you don't have time.

And Linda [Howe] is a wonderful resource! I should add that right now. She does so much work beforehand that we wouldn't be able to do this without her. That's always true of staff. Now she has a vote on the board, which I think is only right, because she's very wise, and she's very fair, and very compassionate, and smart and quick. You need that. She sends us every proposal, so each one of us lugs in this five-hundred pound packet of proposals (slight exaggeration)

stacked this big [gestures], because she sends us the whole thing.

We respect each other. There's not this kind of fear and this kind of, "Well, I'd better not say this, because Susan may get mad at me for that," or "I'd better not say this, because Ed may not like that." I mean, no! We go at each other, and we're very honest. It wouldn't work otherwise.

Morris: It sounds as if the Zellerbach board of trustees has given up some of its power.

Mirikitani: Wonderful! It's the board expanding their power. People who are secure about their power aren't threatened. They do not hesitate to empower.

That's what's innovative about all of this. If Ed said, "Well, we're going to let you give us recommendations and we'll pick your brain, but, really, the final decision's up to the Family Fund's board," I would say it's tokenism. And he would say that too. What is so important is that we have complete autonomy to make the decisions about the Community Arts grants.

To Broaden Views of the Arts

Morris: Did the committee get involved in Festival 2000?

Mirikitani: The organizations who are part of Festival 2000 are certainly coming to us for proposals to supplement the budgets. Festival 2000 came out of Grants for the Arts. It was a multicultural effort that was brought to Grants for the Arts, which provided the initial funding for it. And now Festival 2000 has to go out and raise a certain amount of money. I don't know how much that is.

I think my bottom line is that the multicultural arts organizations need and will continue to need tremendous support because, again, the perception of its worth is determined by the power structure that does not include people of color in the decisionmaking. And I'm talking about huge institutional views of this. I'm not criticizing any one foundation. I'm not criticizing any one institution. I'm saying the television industry, the movie industry, the book industry--this is what I'm talking about, "institutional"--vast institutional. Until we begin to change the view of the

viewer, the world is going to be as narrow as what is defined to us or was allowed to be defined.

My concern, in all the anthologies that I have been involved in, in all of the efforts that I've been involved in --and I'm screaming, "Multicultural," all the time--is to *broaden* that view. It's not to get me on center stage, or you on center stage, or her on center stage--it is to say, "This is a whole world that needs to be perceived as uniquely American." The symphony, opera, as wonderful as they are--and I'm not deprecating--I'm just simply saying that that's not *all of it*. Euro-American art is not it for Americans of color.

There's a vast throbbing that is going on, especially in the Bay Area, that is called "multicultural," and that needs to be perceived. And Festival 2000, I believe, will help present the broad view, if we're adequately supported. I guess my concern is that it doesn't die after Festival 2000.

The Community Arts Distribution Committee can only do so much. You know what I'm saying? None of us have any illusions about that. Certainly, I think, everybody is very dedicated and very open, too.

Morris: Do you have terms of office?

Mirikitani: I've been there for so long, and I'm scared to ask. [laughter]

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Appendix A.
Memorial remarks for Isadore
Zellerbach, April 1941
Grabhorn Press

IN FOND REMEMBRANCE, herein are set down the words spoken by Rabbi Irving F. Reichert at the Memorial Service for Isadore Zellerbach at Temple Emanu-El, San Francisco, Friday, August 8, 1941, together with the prayer offered at the Commitment Service, held aboard the M. Y. Janidore, on Sunday, August 10, 1941.



ISADORE ZELLERBACH
February 6, 1866 ♦ ♦ August 7, 1941



OUR SERVICE TONIGHT HAS a special significance and solemnity. It is dedicated in reverence and affection to the memory of a distinguished American and loyal son of Israel who rose from obscurity to eminence, and fashioned a long and useful career out of the simple virtues of industry, prudence, honesty, and kindness.

It is unnecessary for me, in this great company of his friends and admirers, to dwell at length upon the fascinating biography of Esadore Zellerbach. You all know that he was born over seventy-five years ago in the straggling mining settlement of Moores Flat, Nevada County, California; that his only formal education was received in the elementary schools of San Francisco; that he commenced his business career at the age of thirteen and nine years later joined the modest paper business of his father,

whence with steady and consistent progress he advanced to a position of commanding importance and influence in the field with which his name is so widely and so honorably associated. It would be tempting to dwell upon the details of the success story that his life unfolded. That story is the story of the growth of one of America's great industries, and Esadore Zellerbach's contribution to it forms an important chapter in that epic. Others, let us hope, will do justice to that theme. It is rather to the personality of the man that I would offer my tribute of affection and esteem, and so speaking, express the sentiments of a host of men and women who, in his passing, have lost a loyal and a treasured friend.

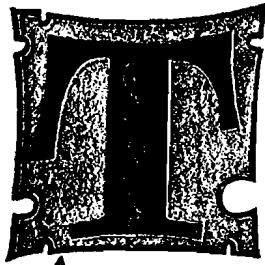
Esadore Zellerbach was an exceedingly unpretentious man. He was unspoiled by fame and fortune, and although success had laid at his feet most of the things that men prize, to the very last he was as simple and unaffected as ever a man could be. That attitude was the reflection of his philosophy of life. He was a great believer in the simple homely virtues — hard work, honesty, thrift, honest to/

goodness common sense. He was as progressive and modern as the latest office device or technological gadget in his vast system of enterprises, but he still believed that in spite of all the changes in this era of revolutionary change, there were some old-fashioned things that remained eternally permanent and true; loyalty, integrity, decency, honor, and fair dealing. There are many men who believe in the maxim of "live and let live," and in this hate-torn world one might indeed wish that there were more of them. But Isadore Zellerbach went beyond that code—he believed in "live and help live." Many a struggling shopkeeper was set on his feet through this man's generosity; his benevolence opened doors of opportunity to many an underprivileged youth. He had a kindly sense of humor, and his love of children was one of his outstanding qualities. His thoughtfulness was reflected in a thousand deeds of kindness and consideration, and ranged from the bestowal of a trifling gift upon a little child to impressive contributions for community philanthropies. For years his monthly "salary list" included names and projects known

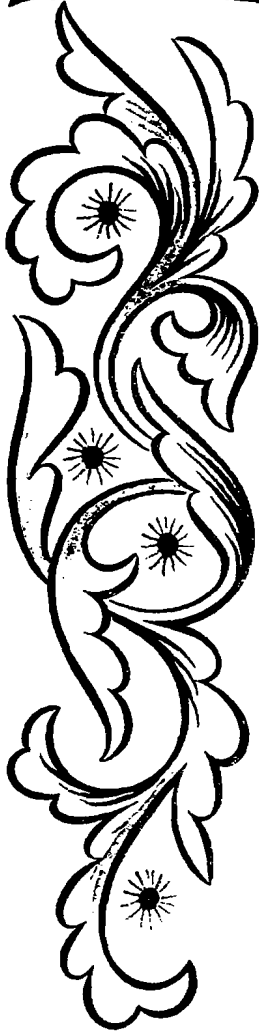
only to his confidential secretary and to the Heavenly Accountant.


Esadore Zellerbach had a strong sense of civic responsibility. He believed that an individual owes certain obligations to the community from which he derives his prosperity. That conviction, strengthened by his great love of nature, found expression in the fourteen years of faithful service he rendered the commonwealth of California on the Fish and Game Commission, serving under four governors, and giving unsparingly of his time and effort toward the conservation of the natural resources of our state.

In his domestic life he was singularly blessed. For more than fifty years he shared a relationship of exceptional beauty with his devoted wife, and in his congenial family circle he found deep and abiding joys. As kinsman and friend he won the loyalty, the respect, and the love of many. His passing has left a void in our midst that cannot be filled, and as we pray for the repose of his immortal spirit, we repeat the farewell of Jonathan to David, "Thou wilt be missed, because thy seat will be empty." Amen.



HE DUST RETURNS UNTO the dust whence it came, but the spirit unto God who gave it. We have reached that solemn and sacred moment of parting from the mortal remains of our loved one. With sorrowing hearts and reverent hands we have borne them on this ship that he loved so well through the Golden Gate — that symbol of the Empire State which was his birthplace, his home and the scene of his great achievements. ♦ This afternoon the Janidore enters the service of our country. It would be difficult to conceive of a more dramatic and moving termination of her association with her old master than this, his final cruise, surrounded by those who were so dear to his heart. ♦ Reverently we commit his ashes to these waters. His soul has gone to his Maker. May he find everlasting peace in the world of eternal life. Amen.



Three hundred copies of this Tribute, designed and illuminated by Rob Rose, have been printed at the Grabhorn Press, San Francisco, for the Zellerbach family. 

MANAGEMENT DIGEST

SAN FRANCISCO

Number 5
June 10, 1947

This Digest Is Intended for the Use of Members of the Management Staff. The Information Contained is Not Restricted as to Circulation Except as to Items Which May Be Definitely Marked Confidential

In the accepted sense, Management Digest is not a newspaper, nor does it mean to become one. It is not inclined towards presenting general news about people, excepting insofar as that information affects people, directly or indirectly, in functions of management in Crown Zellerbach Corporation. Since it is impossible to operate in isolation from economic currents which affect all business, there will occasionally be pertinent references to people and trends outside our organization which seem to bear importantly on what we do. Since everything in our organization—from the Texas Gulf to the Strait of Juan de Fuca, and from New York to San Francisco—must be managed by human beings, names of people and how they are managing their particular activity are inseparately allied with information which the Digest hopes to present. For management, if it is anything, is people. At times the item may refer to an act of management in the past for the bearing it has on the present. At times it may look ahead. At times the activity reflected by the item may seem small and remote; and other times tremendously important and quite near. Whatever the degree, the Digest hopes to share the information with the hundreds of people who are part of Crown Zellerbach management.

Thus, the passing of Albert Bankus, operating vice president of Crown Zellerbach Corporation, takes on extreme importance due to the vitally important changes in management which his passing necessitates. The career of Albert Bankus is an inseparable part of the story of management of this organization. From that May day in 1907 when he began keeping books for the pioneer Crown Columbia Pulp & Paper Company until he passed on, Albert Bankus had moved steadily and surely from one responsibility to another in important functions in Crown Zellerbach Corporation and predecessor companies.

To measure the man, we must take into account that his first duties were those of a book-keeper, who expanded his activities until they also embraced traffic, purchasing and intermill contacts, management experiences which were to stand the present-day company in good stead. For between 1913 and 1915 it was Albert Bankus who was engaged importantly in helping to work out the countless details of consolidation of the Crown Columbia Paper Company and the Willamette Pulp & Paper Company, which resulted in formation of the powerful Crown Willamette Paper Company.

With imagination and the strong will to accomplish anything to which he set his mind and heart, Albert Bankus soon moved from the field of his original training to the challenge of managing papermaking equipment and people who operate it. First a single unit, then a whole mill, and finally a number of mills. In the unfolding of the company's post-war construction and installations in the Pacific Northwest he was near to accomplishment of the most outstanding challenge of his long career when death interrupted; not, however, before he had been assured that all was well with the projects; and not until his name and ability had become known and respected widely as an authority on papermill operations and problems.

Albert Bankus had a boundless capacity for work. He was a forward thinker. Corporately he never looked backward unless it might be to recall some experience which he felt could be valuably reinvested in the future. Well in advance of actual construction on the company's post-war projects, he traveled thousands of miles with associates in search for the "last word" in papermaking plant designs, machinery, equipment and methods. In this

quest he was tireless. As one associate commented: "Albert was not content to visit only the larger papermills, the electric equipment factories and the plants which manufacture papermaking machinery. Frequently we would travel by night to a small mill in a remote area that he might look into a 'save-all' or some improved method which he had been told was operating there."

He showed a keen interest in the company's tree farms and their potentialities. In his operating capacity it was not necessary for him to have professional forestry experience. However, it was necessary for him to know the wood quantities available today and the quantities which could be reasonably expected forty and fifty years from now.

In order to plan modernizations, he first needed to know the varying sizes and species of wood which the mills could expect from regular sources, from salvage and from large and small suppliers. He needed to know how all species would perform in the beaters, in the fourdriniers and in the customer's uses. He needed to know all these things and be satisfied with the answers before he could order a single new operating unit. He knew the whole expansion program depended on the corporate faith and ability to grow trees on a true sustained yield basis.

Finally, when it became apparent that executive decision envisioned the long future for Crown Zellerbach Corporation, Albert Bankus was ready. In long and frequent councils, he helped staff members translate ideas and findings into blueprints and work plans. Later he focused and fixed his time, his experience, his energy and his vision to the great task of building and equipping the modern plants. And along the way he found the time to weld together the kind of a human organization needed to manage and produce new products which were strange to our mills and to Pacific Coast manufacturing.

Albert Bankus had breadth beyond his ability for planning, fabricating, operating and staffing papermills. When the Pacific Coast pulp and papermill operators established collective bargaining relationships with their hourly workers in 1934, he joined with his associates in the corporation and the industry in a strong determination to build a bond of faith that employers and organized employees could work out their own salvation without outside influences. He was among those who helped evolve the Pacific Coast uniform labor agreement under which organized workers and Pacific Coast mills have operated harmoniously for thirteen years. Along with others he invested in collective bargaining much wise and careful counsel which won him the deep regard of employees on the opposite side of the bargaining table. He understood these men. They understood him. They knew him to be generally firm, but always fair. And these men were openly sorrowful when news came, during the recent wage negotiations, that a friend had passed on.

One of his last major responsibilities was the decision to make changes in management at four of the five Northwest mills, changes which seemed to him to be in the best future interests of the company and the management associates involved. When it became apparent that his illness would not permit him to travel north to personally make the announcements, he carefully planned the program for those who would go. He counselled that our supervisors should be the first to know of the changes and the reasons for making them. He counselled that immediately afterwards the community leaders should be invited in to hear of the changes and be introduced to the new resident managers. And he was emphatic that all should understand that the managers who were leaving had been successful in their posts and were moving on to new responsibilities and opportunities in accordance with the corporate plans.

The name of Albert Bankus will be long remembered wherever men make paper. Men will long hold high opinion of his professional abilities. Yet those who were closest to him, will remember and revere him for a typical act and expression. No matter how tangled the skein of manufacturing, labor, supply or organizational difficulties seemed to an associate, one could depend on Albert Bankus saying: "Well, now, it isn't so bad as all that. Let's sit down and see if we can't work this thing out, together."

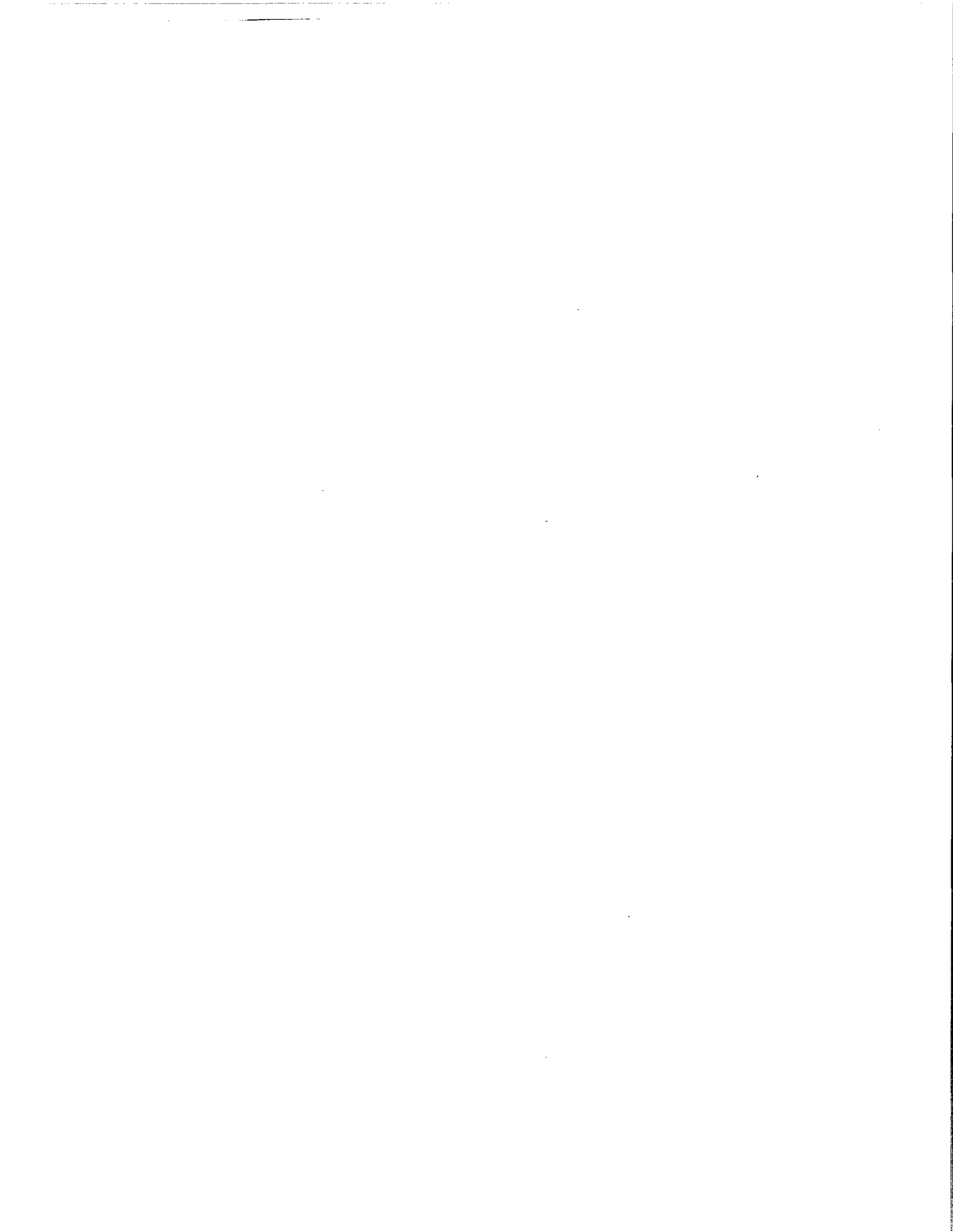
ALBERT BANKUS
1885 - 1947

Albert Bankus, 61, vice president in charge of manufacturing of the Crown Zellerbach Corporation, who began his papermaking career more than 40 years ago with the Crown Columbia Paper Company, passed away on Saturday, May 31, at his home in St. Francis Woods, San Francisco following an illness of about six months. Funeral services were held on Tuesday, June 3, at Gray's Funeral Chapel, San Francisco. Burial was in Cypress Lawn Cemetery.

Mr. Bankus was born in Forest City, Iowa on September 6, 1886. At the age of four he moved West with his parents to a farm near Gresham, Oregon, where his early schooling was in a little red school house. Graduating from high school at Portland, Oregon on February 14, 1906, he took a business college course and joined Western Transportation & Towing Company, which later became Western Transportation Company. In 1907 he began work as a book-keeper for the Crown Columbia Pulp & Paper Company. Varying experiences followed until after the merger of the Crown Columbia Company and the Willamette Pulp & Paper Company until he became resident manager of the Crown Willamette Paper Company mill at West Linn. He was also resident manager at Camas and assistant to the late A. J. Lewthwaite, vice president and general manager in the Portland office. He became a vice president of Crown Zellerbach Corporation on August 27, 1936 and a member of the board of directors in 1941. He had also previously been a vice president of Pacific Mills Ltd. He was widely known throughout the nation for his ability and his knowledge of papermaking techniques and problems.

He was married to Miss Etta Shriner at Pleasant Home, Oregon on June 11, 1908. A son, Allan Edward, blessed the union. Allan is attending Oregon State College. Mrs. Bankus is living at the family home, 270 San Anselmo Avenue, San Francisco. Three brothers survive--John and Walter, of Portland, Oregon and Elmer of Brookings, Oregon.

He was a member of the Olympic club, Commonwealth club, Islam temple of the Shrine, San Francisco; Wild Goose Country club of Sacramento and the Arlington club of Portland. He was a member of F & A. M. Clarke lodge 203, Camas, and an honorary member of the Camas mill's Old-Timers 25-Year club.



Introduction

It is with pride and a sense of accomplishment that the trustees of The Zellerbach Family Fund present our 1988 projects and grants.

The Zellerbach Family Fund strives to be a positive influence by concentrating much of our effort on early childhood concerns and the educational and emotional experiences of children from very low-income families or whose family life is unstable. We hope that our efforts in the area of family life, one of our main interests, lead to ways to strengthen families and to improve the self-esteem of parents.

Each program that we initiate and support carries the hopes of our trustees and the support of outstanding professionals who volunteer their time to develop and guide our projects. Through our publications we strive to inform policy makers and program leadership in the fields of education, mental health, social service and child welfare about what we have learned. A list of our recent publications is included in this report. The publications are available to you upon request.

We also value the support that the Columbia, Wallace Alexander Gerbode and Levi Strauss Foundations provide to the Community Arts Distribution Committee. The participation of our colleagues in project-funding discussions with our Community Arts Distribution Committee members has strengthened the committee and broadened its perspective. All of us and our grantees benefit from the continuing relationship.

The trustees, members of our advisory committees and our staff welcome your comments.

William J. Zellerbach, *President*
Zellerbach Family Fund

APPENDIX D: SUPPORTING DOCUMENTS IN THE BANCROFT LIBRARY

A. Chronological listing of speeches, reports, memos, other items written and/or donated by Ed Nathan.

"Zellerbach Family Foundation, Review and Recommendations," Heald, Hobson and Associates, Incorporated, New York, 1968.

Northern California Foundations Group, flyers and songbooks, 1978-1981.

Notes for Northern California Foundations (staff) Group meeting on emergency needs, 1981; stapled to notes for panel presentation on Private Choices and Public Policy, Council on Foundations, Washington, D.C., 1985.

Discussion draft, Foundations-Corporations Response to Reduction in Federal/State Support of Community Services, 1982?.

"Emergency Family Needs and Child Welfare," [California] Conference of Local Mental Health Directors, 1983.

Private Sector Initiatives, presentation to President Reagan's Special Assistant for Private Sector Initiatives, 1983.

"An Agenda to Survive Hard Times," Southeast Asian Refugees in the United States, The First Decade, 1975-1985, National Conference, 1985.

"Commitment to the Profession--Social Policy and Clinical Social Work," California Institute of Clinical Social Work Commencement, Mills College, 1985.

"The Foundations/Corporations Emergency Fund Committee," in Perspectives on Collaborative Funding, A Resource for Grantmakers. Northern California Grantmakers, San Francisco, 1985.

"Public Private Partnerships, What to do when there's no light at the end of the tunnel," Second National Invitational Symposium on Child Welfare, 1987.

Memos re Mayor's Committee on Targeted Assistance, 1987.

Workshop packet, Surgeon General's Workshop on Self-Help and Public Health, 1987.

Folder, legislation, newsletters, etc. on Integrated Service Systems programs of the California Department of Mental Health, 1988-1990.

Arthur Bolton, "Changing Organizations in Response to Changing Times, A View from the Bronx," presentation to the annual program meeting of the Zellerbach Family Fund, 1989.

B. ZELLERBACH FAMILY FUND PUBLICATIONS, 1980-1990

Annual reports, 1984, 1988.

"CETA Artists and Education," an evaluative report on the use of CETA artists in San Francisco schools, Lesser & Ogden Associates, San Francisco Study Center, for the San Francisco Foundation and Zellerbach Family Fund, 1980.

"Children's Own Stories," A Literature-based Language Arts Program, Grades K-4, Lynn Landor, San Francisco Study Center, 1989. With video order form leaflet.

"Closing the Service Gap," San Mateo County's Family Outreach Project, Marjorie Beggs, San Francisco Study Center, 1989.

"Issues Arising," annual report, 1981.

"Mental Health Client Self-Help Projects," leaflet, n.d.

"New Hope for Drug-Exposed Infants and Their Mothers: Mandela House," by Marjorie Beggs, San Francisco Study Center, 1990.

"On the Move in San Mateo County," Support team services for homeless mentally ill, Marjorie Beggs, San Francisco Study Center, 1987,

"Parent Empowerment Project," a project of the Mission Reading Clinic, San Francisco Study Center, 1989-1989 report.

"Performing Arts Assistance Program, 1989-1990," leaflet, n.d.

"Perspective on Community Arts," Zellerbach Family Fund philosophy and procedures, 1985.

"Public Presentations Assistance Program," leaflet, n.d.

"Youth Chance," A program of the San Francisco Mayor's Office of Employment and Training, an evaluation report prepared for the San Francisco Foundation and Zellerbach Family Fund, Lesser & Ogden Associates, San Francisco Study Center, 1980.

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