Building on success  How the power of a family foundation and public contributions have combined to open San Francisco’s great outdoors to everyone.
Forces build on success to turn Crissy Field, Presidio
San Francisco Business Times Contributor
BY SUSAN SMITH HENDRICKSON
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Inside a landmark public-private partnership

Forces build on success to turn Crissy Field, Presidio into ‘Parks For All Forever’

BY SUSAN SMITH HENDRICKSON
San Francisco Business Times Contributor

Eight years ago, the Evelyn and Walter Haas, Jr. Fund donated one of the most significant gifts ever received by a National Park — $13.5 million to restore San Francisco’s Crissy Field, now a beautiful shoreline recreation area of the Golden Gate National Park system.

Last spring, on April 11, the Haas Jr. Fund outdid itself and announced a second, even larger donation to the Golden Gate National Parks — $15 million to create a 24-mile trail network within the Presidio and to revitalize the Presidio’s Rob Hill Campground. Combined, these donations account for the biggest cash gift ever given by an individual donor to the United States’ National Parks.

There is much to be learned from the 21-year relationship that has developed between the Haas Jr. Fund and the Golden Gate National Parks Conservancy, the nonprofit arm that financially and through volunteerism supports the Golden Gate National Parks, which includes both Crissy Field and the Presidio.

Gifts that total over $30 million (the Haas Jr. Fund has also made other smaller gifts to the Parks Conservancy over the years) do not happen overnight, or without much back-and-forth.

“Gifts like these happen when people share a common vision and become committed to its realization,” said Greg Moore, executive director of the Golden Gate National Parks Conservancy.

“The excitement to have a transformative effect on the community is very motivational,”

Core to the mission of the Haas Jr. Fund is a slogan is “Parks For All Forever.” That the two organizations share such a close vision is both a natural occurrence and the result of a long-standing relationship.

The Haas Jr. Fund is a private family foundation established in 1981 by Evelyn Haas and Walter Haas Jr., descendants of blue jeans inventor Levi Strauss. Based in San Francisco, the Haas Jr. Fund has a reported value of more than $600 million. It has awarded more than $208 million in grants.

Other benefactors of the foundation include marginalized children, youth and families; the civil rights movement for immigrant and gay and lesbian communities; the University of California, Berkeley; the San Francisco Chronicle Season of Sharing Fund; the San Francisco Museum of Modern Art; Team-Up for Youth; Freedom to Marry; San Francisco Beacon Initiative; and San Francisco Symphony for Keeping Score: MTT on Music. Nearly 60 percent of grants were paid to local organizations in San Francisco and Alameda County. It is run today by four members of the Haas Jr. family — Evelyn and her three children, Walter Haas, Robert Haas and Betsy Haas Eisenhardt.

The Golden Gate National Parks Conservancy was founded in 1991, about nine years after the Golden Gate National Parks were formed. As the sheer acreage of the Golden Gate National Parks has increased over the years, taking in more park land in coastal areas of Marin, San Francisco and San Mateo counties, so have the responsibilities and reach of the Parks Conservancy grown.

One of the biggest supporters of the Parks Conservancy from the beginning was Walter Haas Jr., founder of the Haas Jr. Fund and a member of the National Parks Foundation when the Parks Conservancy was being formed.

“Walter Haas Jr. had a strong affection for the outdoors and his community,” said Greg Moore, executive director of the Golden Gate National Parks Conservancy. “We found two things that meant a lot to him.”

The idea of transforming Crissy Field into a gathering place was a dream of Walter Haas Jr. So he was receptive to the Parks Conservancy’s grant proposal for a study to turn the 30 usable acres of Crissy Field, the former military base, into Crissy Field, a 100-acre urban national park. The result was the Haas Jr. Fund’s gift to the Parks Conservancy for $36,000 in 1986 and the beginning of a fruitful relationship.

When more land potentially came available to Crissy Field with the closure of the whole Presidio military base, the Haas Jr. Fund granted an additional $110,000 in 1993 to study a larger Crissy Field plan.

“In many ways, we bring out the best in one another,” said Moore. “Our conversations have raised the bar of what these National Parks can be.

On our side, because we believe in these lands and their beauty, we can show how these lands can be physically improved. The Haas Jr. family wants to ensure that everyone feels welcome and that the parks are serving all segments of the community.”

Landing the Crissy Field donation

In October 1996, when the Golden Gate National Parks passed all public approvals to begin transforming Crissy Field, the next step was to secure a generous lead donor. Because the Parks Conservancy had a strong relationship with the Haas Jr. Fund following the planning
PARTNERSHIP: Building on success

CONTINUED FROM PAGE 3

studies. It was the one to approach first.
With $25 million to raise, the Crissy Field Campaign was the largest cam-
paign that the Parks Conservancy had ever considered. The Haas Jr. Fund com-
mited $13.5 million to the project.
“The gift from the Haas Jr. Fund helped
verify the true potential of Crissy Field as a
place that could serve our community in
the broadest possible sense,” said Moore.
“It demonstrated that the Crissy Field
vision was a going concern. It had attracted
one of the most beloved philanthropic fam-
ilies of the Bay Area, even the nation. ... It
gave us the inspiration and momentum to
pursue our vision with gusto.”

But the Crissy Field Campaign still had
approximately $11 million to raise, so the
Parks Conservancy kicked into high gear.
Gifts arrived from throughout the Bay Area,
ranging from a $4.5 million gift from the
Robert and Colleen Haas Fund (the person-
al giving fund for trustees of the Haas
Jr. Fund) to collections from elementary
school classes and children’s allowances.

In response to the outpouring of interest and generosity, the campaign
increased its goal to include a program fund and an endowment for the Crissy
Field Center and other elements. By the
time Crissy Field opened, a total of $34.5
million had been raised.

“Crissy has been a hit with people
since the day it opened,” said Bob Haas,
a Haas Jr. Fund trustee. “What inspires the
trustees is the fact that the community
embraced this project, literally cleaned it
up and planted it.”

Building on the momentum

The Parks Conservancy capitalized on
this enthusiasm for their park by expand-
ing the offerings of the Conservancy.
On the higher end of the spectrum, the Parks Conservancy created the
William Kent Society, a level of giving
that denotes a $1,000 contribution. It also
looked for a broad level of support, how-
ever, with its 13,000 member donations
ranging from $25 to $500 a year. On the
volunteer side, the Parks Conservancy
numbers hit roughly 16,000 people.

Shortly after the opening of Crissy Field, the Parks Conservancy also held its first
“Trails Forever” benefit dinner at Baker
Beach. The dinner was a hit and is now
being held for the fifth time this fall at
Land’s End. It is a soldout event at $400 a
ticket. The trails at Land’s End were
recently finished as part of the Parks
Conservancy’s Trails Forever campaign.

Corporate stewardship of Crissy Field
also brought a new element to the Parks
Conservancy. Groups come and bring
checks and then return to steward a cer-
tain site over and over.

“We are always working to develop a vari-
ety of portals for those contributions to
come through,” said Moore. “Ideas that have worked are a series of special hikes, a
July 4th party at Fort Mason on park land,
our Trails Forever dinner, and the simple
reminder that these parks are free to you
every single day and if you use them a lot,
you can be vested in their future.”

Nothing rivaled the opening of Crissy Field in the last six years — until the rev-
talization of the Presidio was announced.

Gift No. 2: The Presidio

Because of the strong partnership
developed during Crissy Field’s transfor-
mation, the Haas Jr. Fund and the Parks
Conservancy spoke frequently after the
Crissy Field project finished. Because of
the close proximity of the Presidio
to Crissy Field, the twosome began to
include the Presidio Trust, the govern-
ment-appointed manager of the Presidio,
in its conversations.
Over the next two years, the group
established a framework for a continuing
partnership, this time with an emphasis
on the Presidio. The Haas Jr. Fund, as repre-
sentative, Executive Director Craig
Middleton, was an old friend of both the Haas Jr. Fund and the Parks Conservancy.
An employee of the Parks Conservancy before the
Presidio Trust was created, Middleton
had been working with the Haas Jr. Fund
folks and Greg Moore since 1993.

“Working together for years makes for
good chemistry,” said Middleton.

The result of the conversation this time
around: A $15 million donation in April
2007 to transform the Presidio into a
National Park that, like Crissy Field, wel-
comes people of all ages and backgrounds.

“Right now, the Presidio is largely
unknown and underutilized, just as
Crissy was 10 years ago,” said Bob Haas.
“We believe there is incredible potential
for this beautiful park to be used and
enjoyed by the entire community.”

To that end, the Haas Jr. Fund’s gift will
create a comprehensive 24-mile pedes-
trian, hiking, and bicycle trail network
in the Presidio. The $15 million will also
revitalize and expand the Presidio’s
Rob Hill Campground — the only campground in San Francisco. When completed, the
campground aims to serve 20,000 people a
year. And, through the Community Access
Program at Rob Hill, a joint project of the
Presidio Trust, the Parks Conservancy and
Bay Area Wilderness Training, children
from low-income communities can experi-
ence their first camping trip and visit to
a national park.

“The Presidio is ... a good place to
make a difference in the community,”
said Middleton.

Because of a matching gift piece of the
Haas Jr. Fund Presidio gift, the public
will again need to become involved to make
a difference — $10 million of the $15 mil-
lion gift is contingent on raising matching
funds. And fundraising has already begun.

“The matching grant is a powerful
incentive,” said Moore. “Donors have
begun to step forward. Fundraising’s goal
is to raise $2.5 million of the matching
requirement by January 2008.”

The remainder of the $10 million match-
funding is due in three years at the
end of 2010. Moore likens this Presidio
Campaign to last decade’s Crissy Field
campaign in terms of a key moment and
focus for the Parks Conservancy and the
public to come together, which dovetails very nicely with the Haas Jr. Fund’s stated desire to create
vibrant, safe neighborhoods that support
the healthy development of young people
and the well-being of their families.

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New philanthropists in 30s, 40s re-envision giving

Generation seeks balance in career, family, philanthropy

BY SUSAN SMITH HENDRICKSON
San Francisco Business Times Contributor

Three years ago, the Silver Giving Foundation emerged from stealth mode. After six years of tinkering and trying things out, Phil Halperin, president and founder of the foundation, was ready to go public with his mission to eliminate the educational achievement gap in the Bay Area.

“We established our foundation in 1998, but kept it anonymous for the first six years because we wanted to learn how to crawl before we walked,” said Halperin. “Learning grantmaking takes time and you make a lot of mistakes.”

Entering the world of philanthropy poses a lot of questions for all businesspeople, and even more for those who are in their 30s and 40s and busy building their careers, wealth, and often, their families at the same time. There’s the how, the what, the why and the when and tied to that, the how much — questions that aren’t easy to answer even if you take the traditional route of waiting to donate until you retire. All of these questions, though, need to be answered to feel comfortable about making the right personal choice for charitable giving.

For Halperin, a fifth-generation San Franciscan from a family known for giving, it wasn’t a question of if and why, it was more a question of how he would choose to do it.

Because he wanted to play an active role in his giving as well as employ a small staff to help him with his research and execution and deepen its impact, Halperin set up a family foundation. And because his wife, Maurine, was formerly a high school English teacher, education seemed like a logical focus for the foundation.

Naming the foundation was also an easy answer. “We called it the Silver Giving Foundation because it’s not about Maurine and me,” said Halperin. “We don’t feel compelled to have our name on anything.”

When was a question that took a little bit longer to answer. Halperin, now in his mid-40s, started the foundation while still working in the finance world. When the foundation revealed its identity six years ago, Halperin made the switch from being a full-time for-profit guy to a full-time nonprofit guy.

“In my father’s generation, people looked at their careers as one long novel,” said Halperin. “Many of my generation of friends and I look our careers as a series of chapters that may or may not be related.”

It turns out that the chapters of Halperin’s life do overlap. When choosing companies to invest in, Halperin had to focus with a slimmer eye. Focusing is also what Halperin found to be the key lesson he learned while getting his foundation up and running.

“Making a portfolio was like the stock market game, where you talk about the best time to exercise your options,” Halperin said. “If you spread it too thinly, it doesn’t have much impact.”

To that end, the Silver Giving Foundation makes about 30 to 40 grants a year to Bay Area educational organizations in amounts varying from $25,000 to $100,000. Its definition of education has narrowed over the years. The foundation used to support adult literacy and work with homeless and foster kids, but just couldn’t figure out the right programs for those audiences. It has also turned from working with high school kids to pre-K kids because Halperin and his staff are seeing a greater impact with the younger age group.

“You want the grantees to know what you are looking for and why,” said Halperin. “You also want to be focused in your giving and stick with people year after year so organizations can plan. Let them know that if they do what they say they are going to do, you’ll be with them.”

How much is enough?

For many 30- and 40-year-olds interested in personal philanthropy, the question of “how much is enough to start giving” is key. While working professionals, they may not have the means now, or ever, to dole out $100,000 grants such as the Silver Giving Foundation does.

“If I don’t have enough yet, can I really make a difference?” is a question,” said Halperin. “I hear all the time.”

Susan Hirsch, founder of San Francisco-based Hirsch & Associates, a philanthropic advisory firm. “You don’t have to have enormous amounts of money to start thinking about giving and devoting time and resources to it.”

When considering the amount that you will set aside for charitable giving, Gretchen Hollstein, portfolio manager for Larkspur and Orinda-based Litman/Gregory Asset Management, advises first making sure you are providing for your family throughout their lifetimes. Then set aside an amount for gifting.

“You don’t want to give without planning. If you are in your 30s or 40s, you want to have a plan put together to provide for yourself and your family for the next 60 to 70 years. Once that goal is set, how much does that leave you for gifting?” said Hollstein. “This is where values come into play. Once you set aside an amount that is available for gifting, then it becomes a tax planning game, where you talk about the best time to exercise stock or sell securities or other assets to use as a gift to avoid capital gains.”

Most of Hollstein’s 30- to 40-year-old clients start giving within their families — to help parents with retirement or to put a brother’s kids through college or help a relative start a business. Then they look out to other causes, getting involved in the things that affect their lives directly, especially organizations that involve their kids, such as schools.

This is the path that Grace and Steve Voorhis took.

Ten years ago, fresh out of business school and newly married, the Voorhis laid out a long-term financial plan, which included supporting their families, paying off their school debts, saving for the future and giving back to the community. Initially, charitable donations were small because the other goals had to take priority.

Five years into their giving, the Voorhis, who are in their late 30s, have established a generous set amount they like to contribute to charitable causes each year. Grace actively contributes her time as a board member of Breakthrough Collaborative, a San Francisco-based nonprofit that provides educational opportunities for high-potential, poor middle school students, while Voorhis manages the financial and logistical aspects of their giving.

“People spend that kind of money on one short vacation,” said Voorhis. “To help themselves move forward and narrow their focus within the two chosen areas, the pair engaged philanthropic advisor Hirsch to help them do due diligence on a number of organizations.”

“Susan Hirsch was able to make a lot of introductions as well as give us advice on how we select organizations, monitor their investments, spread or concentrate donations, ensure continuity and give out of income or assets,” said Voorhis, who also talked to friends who worked at nonprofits about what they thought made a good donor.

In the end, the Voorhis decided to forgo the traditional “Learn, earn and serve” model of putting away money to donate later and instead decided to get started with their giving right away out of annual cash flow.

“We decided to start earlier in our lives because we felt very fortunate,” said Voorhis. “For $2,000 or $3,000 a year, we saw that you can change a kids’ life. People spend that kind of money on one short vacation.”

Always looking for time efficiencies, the Voorhis chose to direct their charitable giving through a donor-advised trust, available through most major brokerage houses as well as community foundations such as the San Francisco Foundation. Grace and Steve Voorhis are the beneficiaries of a donor-advised trust can simply log on to their trust, click on the organization where they’d like to direct a donation and the gift will be made directly.

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**30-TO-40: Looking for new ways to get more out of giving**

Continued from Page 5

The Voorhiss' chose Breakthrough and KIPP after seriously looking into a variety of educational organizations for underserved communities. The Voorhiss became more interested in, we gave bigger checks to and started talking to the groups more. You show interest and support and the groups start to see you as a resource,” said Grace.

“A real passion for helping women achieve economic parity.”

Schwab Pomerantz: “A real passion for helping women achieve economic parity.”

For Breakthrough, Grace performed two small pro bono projects before joining the board; with KIPP, she found that many of her opinions meshed with those of the board. She and Steve felt both groups had scalable models and strong leadership.

“The organizations that we feel most strongly about are the ones I end up dedi-
cating my time towards,” said Grace. Steve, an equity analyst with Dodge & Cox, is not physically in the board room with Grace, but “we make all the deci-
sions together. We view our philanthropic work as something important that we prioritize as a couple.”

**Making your time count**

Continuing with a philanthropic organization in a meaningful way can be very time-consuming. Grace Voorhis estimates that she spends 30 to 40 hours a month on board work for Breakthrough and KIPP — more than she thought she would when starting out.

“We had some unrealistic goals in the beginning,” said Grace. “I thought I could contribute to four to six boards. Now I know that is not the way it works. That would be way too much work, more than I could balance with my growing family.”

Finding a balance between one’s professional life, family life and philanthrop-
ic life takes thought and trial and error. For some, like Carrie Schwab Pomerantz, balance is achieved when personal philanthropic work becomes such a passion that it actually turns into a new career direction.

While working for Schwab as an assistant branch manager in Atlanta during her early 30s, Pomerantz was approached by a friend to raise money for the Atlanta Women’s Foundation.

“I was asked to raise $50,000 with the group on behalf of dis-adantaged women and girls,” said Pomerantz, now in her late 40s. “What makes you so successful is having passion around what you do. I discovered I have a real passion for helping women achieve economic parity.”

Seven or eight years after first trying her hand at fundraising, Pomerantz was able to bring this passion to Schwab. “Because of my advocacy I was asked to run the Schwab Foundation,” said Pomerantz. “Now I get to help all people reach financial fitness.”

As president of the foundation, Pomerantz oversees the company’s philanthropic strategy and resources. The foundation is focused on helping at-risk teens and young adults achieve finan-
cial success, and supporting the philanthropy of Schwab’s employees through a matching gift program and an annual employee volunteer day. Through the Foundation’s major partner, Boys & Girls Clubs of America, Pomerantz created and oversees a national financial literacy program designed to reach millions of teens. Annually, the Schwab Foundation contributes $3 million to more than 2,300 organizations.

Dually, Pomerantz puts her passion for advocacy to work as chief strategist of consumer education for Charles Schwab & Co., where she is the company’s lead-
ing advocate for individual investors. She speaks and writes extensively about personal finance issues, and is a driving force in the movement to improve finan-
cial literacy in the United States.

Outside of work, Pomerantz sits on the board of the International Museum of Women and Common Sense Media, a media advocacy organization that promotes gender equality.

Each year she also chairs a major fund-
raising event. This year she is helping the American Heart Association raise $1.3 million through its annual benefit, an effort that will take 10 months of work.

“I have my parameters,” said Pomerantz. “I will consider it only once a year, even though now I actu-
ally think I need a year off.”

Pomerantz keeps going, though, both professionally and personally. Leverag-
ing her resources such as her contacts and expertise. At the Schwab Foundation, that meant restructuring and focusing its giving.

“We contacted the largest agency in the United States used by kids, the Boys & Girls Clubs of America, which serves four million children a year,” said Schwab Pomerantz. “They know how to engage kids. We know personal finance. We’ve had a lot more impact than just the dollars we could have given.”

**Starting your own nonprofit**

Sometimes when searching for the right nonprofit to donate or volunteer with, it becomes obvious that there is a void that isn’t being filled. That was the case for Kendra and Billy Robins.

Always active volunteers, but consist-
tently running into scheduling problems that prevented them from volunteering on a weekly basis. Kendra wished for an organization where they and others could volunteer in a on-off manner, annually or whenever time allowed. At the same time, Kendra was at a turn-


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**Solutions**

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"With Project Night Night we don’t have to buy capital items. We get our supplies donated or purchase them with minimal donations and give them right back out. Other ideas I had were much too grand."

In the two-plus years since it started in 2005, Project Night Night has grown, thanks partially to attracting Safeway as its first corporate sponsor in 2006. Kendra formally applied for a grant and received $5,000. “I couldn’t get a grant before Safeway,” said Kendra. “I can’t give them enough credit.” The grant provided seed money to buy an inventory of 1,000 tote bags, so that when the organization took on a shelter, it could guarantee that it wouldn’t be a one-time donation, but instead an available resource to call each time a new child arrived.

Since then, Cisco Systems has underwritten the cost of 300-plus bags, and the Wells Fargo Foundation gave Project Night Night a $50,000 grant this year which will allow the group to buy better materials when they are not donated and take on new shelters that contact the group.

Volunteers for Project Night Night can set up a tote bag drive once in their community, annually at work, or on a more regular basis, donating items, money or delivery time whenever they can. The results are that Project Night Night has delivered 21,000 Night Night delivery time whenever they can. The results are that Project Night Night has delivered 21,000 Night Night Packages in 200 shelters in 26 states, including every shelter that serves children in San Francisco. Once a week, a new shelter from across the country calls.

Building a sense of community through giving

Deciding to donate either time or money to a nonprofit means choosing to join a community. For those looking for others to join financial forces with, or who would like to have regular discussions with others about causes for which they are passionate, donor circles are a good option.

“Donor circles bring a lot of groups together to decide how to address an issue,” said philanthropic adviser Hirsch. “With them you are doing much more than writing a check. There is a social component, more intellectual capital, intellectual curiosity and learning about the issue that is beneficial to everybody.”

At Full Circle Fund, a San Francisco-based donor circle, members invest $1,000 to $25,000 annually and live to 20 hours a week of their time and brainpower to one of four focus areas: affordable housing, education or technology, and soon, the environment. The group has about 125 members, with 40 percent coming from the nonprofit sector and 60 percent from the private sector. Age-wise, the members range from 25 to 45 years old.

“Full Circle Fund members are all talented, successful young business professionals who want to give back to the community during the prime of their careers with more than their checkbooks,” said Amy Lesnick, executive director of the Full Circle Fund. “Our members have been to a million parties and park cleanups and are craving more. … Through the fund, they can leverage their skills and talents to help nonprofits be successful.” Full Circle Fund members work closely with the nonprofits they choose as grantees to launch a marketing plan, restructure a board or other projects that help take the nonprofit to the next level.

“We also are cultivating the next generation of leaders as well as driving change,” said Lesnick.

"The women who got together that day stayed engaged,” said Caldwell. “We are now a volunteer corps with one formal, paid employee.”

The organization has three focuses: Climate Action Kids, climate science education for children; EcoSalon, a national network for women who want to gather to gain knowledge and resources to impact global warming; and Influence America!, a political action arm.

Caldwell, because of her background at the Nature Conservancy and as a children’s book editor, and because of the fire in her belly, is the founder and executive director of the group.

“I got pulled into it,” said Caldwell happily. “It’s a very gratifying feeling to have found that crossroad between one’s personal passion and professional background and talent. I found that I am ready to get back into environmental causes after seven years off raising my children and I’ve found that there are a lot of other women out there with untapped energy and enthusiasm and intellect. They want to have their ideas noted and debated by others. That is what spurred me on to take the leadership role.”

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