



**PACIFIC FOREST AND WATERSHED LANDS STEWARDSHIP COUNCIL
YOUTH INVESTMENT PROGRAM**

FUNDRAISING LANDSCAPE REPORT

JULY 2005

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EXECUTIVE SUMMARY

In early 2005, the Land Stewardship Council (LSC) retained Tides Foundation to help its Youth Investment Committee design a grantmaking program. The grantmaking program's goals are to:

- Improve the lives of underserved youth by providing wilderness and environmental educational and recreational opportunities;
- Add and enhance recreational facilities and parks in underserved communities; and,
- Make lasting investments and improvements in the social, physical, and environmental infrastructure of low-income communities.

The Committee seeks to use this report to help determine its role in the field, as well as to identify potential partners for collaboration. A key goal of the Youth Investment Committee is to develop partnerships that will enable it to leverage its finite financial resources and increase the level of support going to parks and environmental and outdoor educations. This report provides the Youth Investment Committee with dense information—much of it in the form of lists and tables—that include information about levels of giving, areas of interest, and types of grants each institution has made. This data will assist the Committee to begin its outreach and development of partnerships.

Please find below a summary of the report's key findings.

A. Key Findings & Recommendations

- There are numerous opportunities for Youth Investment Program to invest its resources strategically in order to make the most significant impact. The field is ripe for the Youth Investment Program to position itself as a key funder in the field of environmental education and parks grantmaking. As such, it will have the opportunity to convene and leverage from a variety of sources. However, this relatively large role in the field will put pressure on the Program to manage the fields' expectations, and demand will invariably exceed available support.
- The Youth Investment Program's goals of reaching underserved youth will help meet a critical need.
- The Youth Investment Program's resources will significantly increase the current levels of funding in several focus areas; it will particularly affect supporting minority youth in environmental programs.
- Private Foundations are key sources of support for the areas of interest to the Youth Investment Program. However, the overall level of giving to environmental and outdoor education and parks is relatively limited.
- Community Foundations have good understanding of local communities and organizations in PG&E Territory. And while they vary in organizational capacity and resources, they may be valuable as partners for the Youth Investment Program as it develops as they count with key assets, such as relationships to local donors and

corporations. The Program should also explore developing relationships with those community foundations present in areas with watershed lands.

- Funding for the Youth Investment Program’s areas of interest is limited when compared to overall environmental or education giving. Herein lies a great prospect for YIP to play a leading role in galvanizing funders to increase support to parks and environmental and outdoor education in underserved communities.
- Partnership and collaboration with other funders—both private and community—will enable the Youth Investment Program to leverage its \$3 million dollars and bring together the strengths and capacity of different organizations.
- The Youth Investment Program should consider partnering with community foundations. Community foundations can provide the necessary local knowledge and expertise for awarding grants to communities across PG&E territory.
- Similarly, the Youth Investment Program should consider conducting outreach to private foundations, as private foundations can bring substantial resources to an issue. Key potential partners might include health-related private foundations such as California Wellness or the California Endowment. Smaller private foundations may also provide key opportunities for partnership.
- The Youth Investment Program should look closely at how it can develop synergies with Proposition 40 monies.
- In light of the current fiscal state of California, the Youth Investment Program should consider building relationships with service providers in the field in order to successfully lobby Sacramento for increased funding for the Programs’ areas of interest.

I. BACKGROUND AND METHODOLOGY

In early 2005, the Land Stewardship Council (LSC) retained Tides Foundation to help its Youth Investment Committee design a grantmaking program. The grantmaking program's goals are to:

- Improve the lives of underserved youth by providing wilderness and environmental educational and recreational opportunities;
- Add and enhance recreational facilities and parks in underserved communities; and,
- Make lasting investments and improvements in the social, physical, and environmental infrastructure of low-income communities.

As part of this process, the Youth Investment Committee requested that Tides assist it with better understanding the funding landscape relevant to its goals. The Committee seeks to use this report to help determine its role in the field, as well as to identify potential partners for collaboration.

A key goal of the Youth Investment Committee is to develop partnerships that will enable it to leverage its finite financial resources and increase the level of support going to parks and environmental and outdoor educations. This report provides the Youth Investment Committee with dense information—much of it in the form of lists and tables—that include information about levels of giving, areas of interest, and types of grants each institution has made. This data will assist the Committee to begin its outreach and development of partnerships.

The report is organized into several sections and items B through E focus specifically on giving in California and on PG&E territory more specifically when the information was available:

- A. National Overview of Giving
- B. Private Foundation Giving
- C. Community Foundation Giving
- D. Corporate Giving
- E. Public Sources of Support
- F. Conclusions and Recommendations

Research Methodology

Tides Foundation performed the bulk of its research with a database maintained by the Foundation Center, a leading national authority on philanthropy, called Foundation Center Online. This database captures all grants reported by grantmakers and allows searches for grants and foundations using a variety of criteria. Below is an overview of database functions and Tides' search methodology.

Foundation searches: The database allows searches for foundations using any or all of the following criteria:

- Foundation name
- Foundation state and/or city
- Fields of interest
- Types of support
- Geographic Focus
- Trustees, Officers and Donors
- Type of Grantmaker

Foundation searches provide foundation names, locations, and total giving.

Grant searches: The database allows searches for grants using any or all of the following criteria:

- Foundation name
- Recipient name
- Recipient state and/or city
- Recipient type
- Types of support
- Programmatic subject

Grant searches provide foundation names, recipient names, years of grant authorization, grant amounts, and, sometimes, details of the program or organization funded.

Geographic Focus: Though the Center database allows searching by state and city, it does not permit searching by county or region. Given the number of cities included within the PG&E service territory at issue, searching is feasible only on a statewide basis (or by focusing on a select number of cities, which is presented below). As a result, search results presented here include some grants for areas outside the region to be served by the Youth Investment Program. The number of grants and amount of grant dollars reported should be viewed with an eye towards understanding that as a result, the impact of the Program's support will be more marked.

Programmatic Focus: Searches for foundations and grants by area of interest are performed using pre-selected categories. Those offered in the database that are relevant to the Youth Investment Program's goals include:

- Youth
- Youth development services
- Minorities
- Natural Resources
- Environment
- Environmental Education
- Parks / Playgrounds

Note on Search Results: Because grants may be categorized by multiple subject categories, search results contain overlap. For example, many grants to "parks/playgrounds" are also categorized under "environment." As a result, search results for "parks/playgrounds" and for "youth + environment" will yield some of the same grants. Search results, therefore, should be viewed as individual snapshots on giving. Grant amounts from different search results cannot be aggregated to reach an accurate total figure.

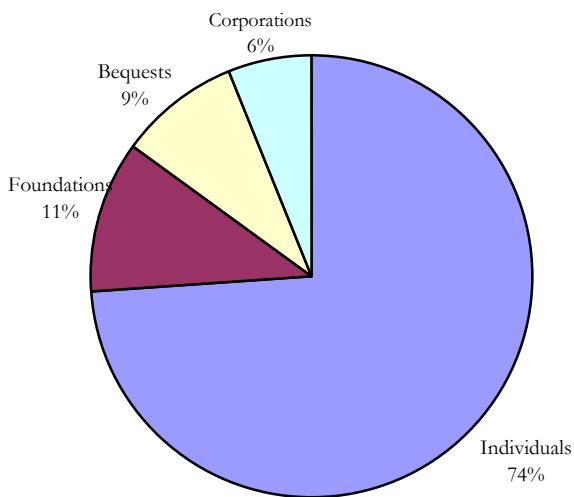
Research on Community Foundations included using several directories (sourced in the document) and conducting in-depth research on each foundation with its Websites. Research on public sources of financing included extensive conversations with Parks and Recreation staff, budget analysts in Sacramento and searching reputable Internet Websites.

II. PRIVATE CHARITABLE GIVING

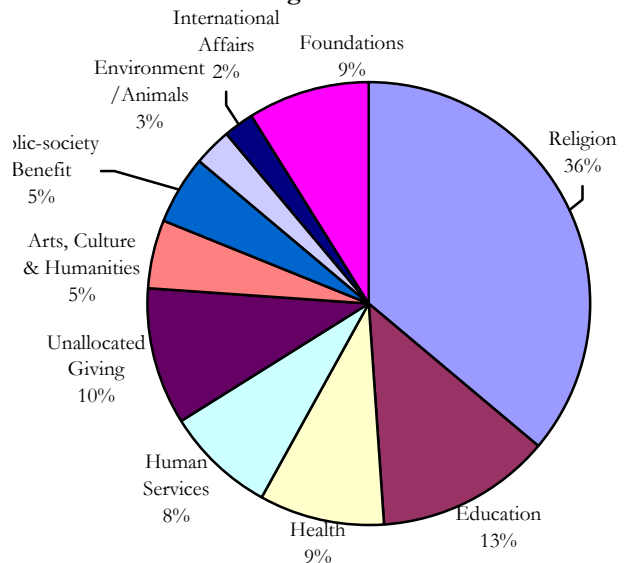
A. National Overview: Who Gives It and Who Receives It

Of the \$241 billion in total giving in 2003, nearly 75% or \$181 billion of it is given by individuals. Foundations gave approximately 11% or \$26 billion, and corporations accounted for slightly over 5%, or slightly over \$13 billion. Bequests by individuals accounted for nearly \$22 billion. Giving in 2003 rose by only 0.5 percent; Giving USA anticipates that 2004 figures (available in late July) will reveal a 5 percent increase to nearly \$250 billion.¹

National Charitable Giving By Source



National Charitable Giving By Recipient Organization



In 2003, religious institutions received the lion's share of grants at nearly 36% of total giving equaling \$87 billion. Lagging far behind in second are educational institutions, including colleges and universities that received about 13% or \$31 billion, followed by the health sub-sector at \$21 billion. Human services organizations received about \$19 billion; the arts, culture and humanities sector received \$13 billion, and public-society benefit organizations received about \$12 billion. International affairs organizations receive less than \$5 billion. Most relevant to the Youth Investment Program, the environment/animal sector received only \$7 billion.

Below are more detailed descriptions of the categories mentioned above that are most closely related to the work of the Youth Investment Program: environment/animals; public society benefit; and education.

¹ Statistics in this section are from Giving USA 2004: The Annual Report on Philanthropy for the Year 2003, by The Center on Philanthropy. 2003 is the most recent year for which detailed statistics are available from Giving USA Foundation. The Foundation recently announced that total estimated charitable giving increased 5% in 2004 to reach \$248.52 billion. Detailed statistics for 2004 will be available in July 2005.

Giving to Environmental/Animals

Giving to organizations in this category includes gifts for research or education about or for protection of the environment, including conservation societies. However, the statistics also include gifts for animal-related organizations and, as a result, reflect giving beyond the scope of the Youth Investment Program's interests. Giving to the environment/animals increased an average of 5.4% between 1987 and 2003, reaching \$6.96 billion in 2003.

Giving to Public-Society Benefit

Giving to public-society benefit organizations includes contributions to nonprofit organizations that fund a number of other agencies, including those working for social action and community improvement. After two years of decline, giving to public-society benefit organizations grew by 2.3% in 2003 to reach \$12.13 billion.

Giving to Education

Giving to education likely includes contributions to environmental education programs. The majority of gifts in this category, however, are directed toward academic institutions and programs unrelated to the environment and are most likely outside the Youth Investment Program's focus.

B. Private Foundation Giving in California

Private foundations account for the second most significant source of charitable giving behind individuals, at \$26 billion per year. It is unclear how much of this is invested in California. Private foundations are tax-exempt charities typically funded by one person, a small group of family members, or one corporation. Private foundations source of funding is investment income from an initial endowment. Often, private foundations tend to have strict limitations on their areas of support, as these are most often designated by the founder at the time of inception.

Below is a list of 18 private foundations that that are most aligned with the Youth Investment Program's goals and have contributed significantly to areas of interest to the Youth Investment Program in California. Several foundations with less significant grantmaking are also included because they have funded organizations and projects that have clear programmatic intersection with the Youth Investment Program's goals. Grants range widely; from supporting educational programming at museums, to advocacy grants to secure equal access to parks, to scholarships for low-income students to attend camps.

A more detailed search by grant type is presented after the following table.

PRIVATE FOUNDATIONS OF NOTE

FUNDER	TOTAL ASSETS (TOTAL GIVING)	AREAS OF INTEREST/ CONNECTION TO YOUTH INVESTMENT PROGRAM	EXAMPLE OF SPECIFIC GRANT MADE
Ford Foundation (New York, NY)	\$10,639,366,000 (\$520,273,000)	Environment/development (help acquire, protect and manage land, water, forests to reduce poverty/injustice); Community Development (improve opportunities/ quality of life for positive change in urban/rural communities)	To Center for Law in the Public for collaborative effort to secure equal access to recreation/parks in underserved neighborhoods
David and Lucile Packard Foundation (Menlo Park, CA)	\$5,328,293,452 (\$302,778,355)	Children, Families, and Communities; Science and Conservation; focus on northern California counties (San Mateo, Santa Clara, Santa Cruz, Monterey)	To Coastside Preservation and Recreation for Moss Beach Park and Playground Project
Gordon and Betty Moore Foundation (San Francisco, CA)	\$4,846,115,373 (\$85,489,625)	Environmental conservation, science; San Francisco Bay Area	To Bay Area Discovery Museum for environmental education
California Endowment (Woodland Hills, CA)	\$3,572,425,281 (\$152,020,976)	Economically disadvantaged; minorities; promote fundamental improvements in the health status of all Californians	Multiple grants to American Lung Ass'n re reducing indoor/ outdoor environmental asthma triggers among minority children; funded playground in Humboldt county
Annenberg Foundation (Radnor, PA)	\$2,695,762,043 (\$213,209,951)	Education; Giving nationally with preference for southern CA	Sierra Club Inner City Outings
James Irvine Foundation (San Francisco, CA)	\$1,364,920,951 (\$55,516,846)	Sustainable communities; Children, youth, and families	To Yosemite National Institutes for low-income students from Central Valley to attend programs
California Wellness Foundation (Woodland Hills, CA)	\$1,055,318,368 (\$40,505,102)	Children/youth and youth development, services; environmental health	To Literacy for Environmental Justice for environmental health education and youth empowerment projects
Weingart Foundation (Los Angeles, CA)	\$748,653,679 (\$34,822,532)	Children/youth, services; community development; economically disadvantaged; minorities; Giving limited to 7 southern CA counties, inc. Kern and Santa Barbara	Grants to many organizations and schools to build/restore playgrounds, with focus on serving low-income children

PRIVATE FOUNDATIONS OF NOTE

FUNDER	TOTAL ASSETS (TOTAL GIVING)	AREAS OF INTEREST/ CONNECTION TO YOUTH INVESTMENT PROGRAM	EXAMPLE OF SPECIFIC GRANT MADE
Evelyn and Walter Haas, Jr. Fund (San Francisco, CA)	\$543,763,647 (\$23,912,036)	Children, youth and families in low income neighborhoods; San Francisco/Oakland neighborhood development	To Trust for Public Land to improve Oakland parks and park management
Richard & Rhoda Goldman Fund (San Francisco, CA)	\$425,403,819 (\$35,979,000)	Environment; quality of life in San Francisco Bay area	To Adopt-A-Watershed for K-12 environmental education; To Urban Resource Systems to create more sustainable park systems in SF
Koret Foundation (San Francisco, CA)	\$316,301,710 (\$21,910,336)	Youth development in Bay Area; community projects that advance environmental concern; US giving limited to Bay Area	To East Bay Conservation Corps for youth development; To SF Friends of Recreation and Parks for general support
Walter and Elise Haas Fund (San Francisco, CA)	\$208,934,387 (\$9,595,223)	Education; Giving primarily in San Francisco and Alameda County	To Student Conservation Ass'n for environmental program with Bay Area urban and diversity outreach
Walter S. Johnson Foundation (Menlo Park, CA)	\$100,613,017 (\$5,000,717)	Education; high-risk youth; youth development; Giving primarily in northern CA and Washoe County, NV	To Mendocino schools for North Coast Rural Challenge Network, teaching kids about rural development and environmental sustainability
D & DF Foundation (San Francisco, CA)	\$67,189,439 (\$14,013,699)	Education; Health organizations; Giving primarily in San Francisco	To Golden Gate National Parks Conservancy for general support
Harden Foundation (Salinas, CA)	\$63,247,484 (\$2,440,493)	Giving limited to Monterey County with emphasis on Salinas Valley area	Numerous grants for recreation, youth services, conservation
The Kimball Foundation (San Francisco, CA)	\$34,620,388 (\$1,115,405)	Youth services; environmental education; Giving primarily in San Francisco, San Mateo, Sonoma, and Marin counties	To Bay Area Discovery Museum for youth environmental education program. To Yosemite National Institutes for environ. education for minority, low-income students
The Gamble Foundation (San Francisco, CA)	\$10,567,355 (\$367,500)	Environmental education; Recreation; Youth development; disadvantaged youth in SF, Marin and Napa counties	To Land Trust of Napa County for environmental education for at-risk youth

The table below more closely analyzes where foundation support is being allocated. Tides' analysis is limited to those areas that intersect with the Youth Investment Program's goals.

PRIVATE FOUNDATION GIVING IN CALIFORNIA BY FOCUS AREA				
Focus Area	Amount Given			
	2002	2003	2004	Total 2002-04
Environment	\$152,026,469	\$100,511,085	\$44,484,389	\$297,021,943
Environment + Youth	\$7,290,306	\$3,967,774	\$2,228,693	\$13,486,773
Environmental Education	\$14,262,284	\$10,454,871	\$5,319,278	\$30,036,433
Environmental Education + Youth	\$2,753,263	\$2,670,672	\$3,182,300	\$8,606,235
Natural Resources + Youth	\$1,296,238	\$2,300,839	\$651,000	\$4,248,077
Youth + Environment + Minorities	\$1,830,000	\$509,984	\$940,103	\$3,280,087
Parks/Playgrounds	\$13,747,703	\$12,291,138	\$2,231,460	\$28,270,301

Environmental Education: Giving to “Environmental Education” has declined significantly each year since 2002. Funding for programs and organizations identified by both “Environmental Education” and “Youth,” however, has been more consistent, and in 2004 giving to youth-related environmental education comprised more than 50% of all giving to environmental education programs.

Environment: Foundations in the Western United States grant a greater percentage of their contributions to environmental organizations as compared to foundations in other regions. The majority of grant dollars (68%) are directed to natural resource conservation and a small percentage (3%) are for education programs.²

Parks/Playgrounds: Giving to “Parks/Playgrounds” decreased dramatically in 2004. This decline may be a result of increased funds available from Proposition 40, which directed \$2.6 billion to the development, restoration and acquisition of state and local parks, recreation areas and historical resources, and for land, air and water conservation programs. Foundations may have decided to focus on other, less funded, program areas.

Youth+ Environment + Minorities: Giving specifically to minorities accounts for the smallest amount of support, at approximately \$3 million over three years.

² Foundation Giving Trends (2005 Edition), Giving Trends of Western Foundations.

Below is a more focused look at and summary of four of the more focused searches presented above, and depicts a much more robust picture of who is funding what, and at what levels. Both these tables will provide valuable information for YIP to begin its partner outreach strategy.

A complete list of grant recipients, award amounts and foundations for these searches is attached as Appendix I.

PRIVATE FOUNDATION GIVING 2002-2004 (By Focus Area)				
	Youth + Environmental Education	Youth + Environment + Minorities	Youth + Natural Resources	Parks/Playgrounds
Total number of grants (2002-2004)	163	47	94	292
Total funds awarded (2002-2004)	\$8,606,235	\$3,280,087	\$4,248,077	\$28,270,301
Grant award range	\$360 - \$2,000,000	\$1,000 - \$450,000	\$500 - \$472,500	\$500 - \$3,919,167
Average grant award	\$52,799	\$69,790	\$45,192	\$96,816
Grants > \$1 million	1			5
Grants > \$100,000	13	9	12	51
Major funders (foundations with aggregate gifts of \$200,000 or more during the 2002-2004 period)	The Ahmanson Foundation (\$287,000); The James Irvine Foundation (\$200,000); Marin Community Foundation (\$1,573,703); Gordon and Betty Moore Foundation (\$924,197); Peninsula Community Foundation (\$305,500); The San Francisco Foundation (\$450,700); Weingart Foundation (\$2,639,949)	The San Francisco Foundation (\$475,000); The California Wellness Foundation (\$680,000); The California Endowment (\$1,689,103)	Annenberg Foundation (\$400,000); California Community Foundation (\$330,000); California Endowment (\$220,000); Ford Foundation (\$400,000); Marin Community Foundation (922,500); San Francisco Foundation (\$223,000)	Ahmanson Foundation (\$497,000); California Community Foundation (\$435,000); California Endowment (\$226,029); California Wellness Foundation (\$225,000); D & DF Foundation (\$375,000); Ford Family Foundation (\$235,000); Ford Foundation (\$800,000); Richard & Rhoda Goldman Fund (\$1,965,000); Evelyn and Walter Haas, Jr. Fund (\$360,000); Walter and Elise Haas Fund (\$325,000); William Randolph Hearst Foundation (\$200,000); James Irvine Foundation (\$475,000); Robert Wood Johnson Foundation (\$607,322); Koret Foundation (\$1,330,000); Kresge Foundation (\$600,000); Marin Community Foundation (\$609,739); Andrew W. Mellon Foundation (\$992,000); David and Lucile Packard Foundation (\$274,870); Peninsula Community Foundation (\$409,067); The San Diego Foundation (\$353,680); San Francisco Foundation (\$2,616,650); Starr Foundation (\$3,650,000); Walton Family Foundation (\$4,913,167); Weingart Foundation (\$730,310)

Note: Searches were also performed for the 13 largest cities in the territory, using the categories outlined above. Searching by location yielded what clearly appears to be very incomplete information and may be the result of certain organizations not existing in certain cities, such as Redding or Modesto. Additionally, all grants going to a certain city may not be captured by the Foundation Center database, since the “recipient” may have been a county, and would not show up under a city-specific search. Results are available in Appendix II.

C. Community Foundation Giving in California

Community foundations are tax-exempt public charities focused primarily on the local needs of a particular region. Community foundations' primary assets come from a collection of permanent charitable funds – money donated by local residents, families, businesses and organizations with an interest in providing a continuing resource for supporting community needs. Assets also come from grant money received from private foundations and/or government agencies. The foundations invest and administer these funds and are run by professionals with expertise in community philanthropy.

Community foundations vary significantly in size, resources and level of services. A small, recently established foundation might focus solely on grantmaking. On the other hand, a foundation with significant resources operating in a community with a strong history of philanthropy might also engage in public policy development and community problem solving. Some more established and sophisticated foundations also offer grantmaking, financial and tax expertise for donors seeking to engage in effective and meaningful charitable giving.

Most foundations, regardless of size and resources, focus their grantmaking on particular populations and/or issues, which may change as their areas develop. Local non-profit organizations often work with community foundations to help identify current and emerging regional needs and issues.

There are more than five hundred community foundations in the United States, all of which share a commitment to improving the quality of life in their area. Below is an overview of the foundations currently serving the regions covered by the PG&E service territory.

CALIFORNIA COMMUNITY FOUNDATIONS FUNDING IN PG&E TERRITORY			
Foundation	Annual Grants	Discretionary Grants	Notes & Comments / Connection to YIP Goals
NORTHERN CALIFORNIA: (from North to South)			
Humboldt Area Foundation	\$3,100,000	\$537,700	Some intersection with YIP goals. They make numerous small (\$450) grants to summer youth programs, fund scholarships, and have a small environmental program. A small contribution could have significant impact.
Shasta Regional Community Foundation	\$745,775	\$0	Their program includes a Grants Advisory Board for Youth (GABY) to support projects planned and carried out by young people 12-19 – an interesting model to explore.
The Community Foundation of Mendocino County	\$323,202	\$137,528	A majority of the foundation's grantmaking goes to scholarship programs. They have a small community grants program for youth programs, community health, and recreation programs. A small contribution to community grants could have significant impact.
Community Foundation of the Napa Valley	\$840,000	\$5,000	Given that the majority of their grants are donor-advised, the opportunity for connection to YIP is insignificant.
Solano Community Foundation	\$45,000	\$0	Primarily donor-advised. Strong outreach to local corporations.

CALIFORNIA COMMUNITY FOUNDATIONS FUNDING IN PG&E TERRITORY

Foundation	Annual Grants	Discretionary Grants	Notes & Comments / Connection to YIP Goals
Community Foundation Sonoma County	\$5,265,000	\$1,391,000	Four fields of interest: Education, Environment, Arts & Humanities, Health & Human Services. The education program includes a specific focus on environmental education and could be a good partner for YIP.
BAY AREA:			
East Bay Community Foundation	\$22,237,747	\$965,590	Includes environmental education for under-served youth under their Environment funding priority. EBCF would be a key partner for reaching under-served urban youth.
Marin Community Foundation	\$52,000,000	\$42,282,196	Their programs include the Earth Day Every Day Fund environmental awareness & education program, and the Community Facilities Partnership Initiative that funds parks and recreation programs. These well-funded programs could be used as models for YIP.
Peninsula Community Foundation	\$88,531,729	\$4,650,071	Environment programs include a specific focus on environmental education.
The San Francisco Foundation	\$64,900,000	\$14,143,102	No explicit programmatic focus that connects with YIP goals, but nonetheless, an important force in Bay Area philanthropy.
Community Foundation Silicon Valley	\$76,000,000	\$1,300,000	Primarily donor-advised. They are currently revamping programmatic criteria.
CENTRAL VALLEY & SIERRAS:			
North Valley Community Foundation (Chico)	\$127,108	\$0	Very small, not much potential for partnership.
Sacramento Region Community Foundation	\$6,000,000	\$35,000	Also provides grants for youth-led projects through the Grants Advisory Board for youth (GABY).
El Dorado Community Foundation	\$380,000	\$106,000	Very small (\$2 million since 1991).
Sonora Area Foundation	\$736,552	\$213,462	Very small, but could be a regional partner if that region is targeted
Fresno Regional Foundation	\$4,372,880	\$55,000	Primarily donor-advised – no defined programmatic focus that intersects with YIP goals, but they are a key organization in central San Joaquin valley.
Kern County Community Foundation (Bakersfield)	\$177,000	\$21,000	No defined programmatic focus that intersects with YIP goals.
CENTRAL COAST:			
Community Foundation of Santa Cruz County	\$3,034,740	\$650,000	No direct intersection with YIP goals, but broad priorities include youth development and environment.
Community Foundation for Monterey County	\$3,950,000	\$1,257,532	No direct programmatic connection, but they are one of the largest grantmakers on the Central Coast.
San Luis Obispo County Community Foundation	\$1,707,686	\$393,892	Sponsors the San Luis Obispo County Environmental Awards and has been steadily growing since creation in 1998. Could be key local partner, where small contribution could have significant impact.
Santa Barbara Foundation	\$18,198,779	\$8,750,582	Programmatic areas are somewhat broad, but include culture and recreation and community enhancement and environment.

A Directory of Community Foundations, with contact information and additional grant data, is attached as Appendix III.

Community Foundations vary in size and organizational capacity. However, all have the advantage of very much understanding their local communities and organizations. Community foundations also tend to have strong relationships with local civic and business leaders.

Small foundations, in mostly rural areas tend to have less developed programs that are very “charitable” in nature: scholarships, schools, local cultural and recreational opportunities. A small contribution could help shape their programs and create opportunities for alignment with the Youth Investment Program’s goals.

Foundations in this category include:

- El Dorado
- Humboldt
- Kern County (Bakersfield)
- Mendocino
- Napa
- North Valley (Chico)
- Shasta
- Solano
- Sonora

Medium-sized foundations, in medium to large cities outside of the Bay Area also tend to be less developed, but are growing with more and more resources, as a result of population shifts. A few, such as Sonoma, Santa Cruz Community Foundations have higher levels of programmatic development. As these organizations are on a growth curve (both in terms of dollars and programmatic development), they could serve as key partners in leveraging Youth Investment Program’s program.

Foundations in this category include:

- Fresno
- Monterey
- Sacramento
- San Luis Obispo
- Santa Barbara
- Santa Cruz
- Sonoma

Bay Area Foundations tend to be much more developed programmatically. The well-resourced counties with fewer under-served communities, such as the Marin, Peninsula, and Silicon Valley Community Foundations can serve as models for raising and leveraging resources, while those that reach under-served populations such as the San Francisco and the East Bay Foundations could serve as important partners.

Foundations in this category include:

- East Bay (Alameda & Contra Costa)
- Marin
- Peninsula (San Mateo & Santa Clara)
- Silicon Valley (Santa Clara)
- San Francisco

D. Corporate Giving in California

Corporation-sponsored foundations report to the IRS annually, and their giving is captured in the database maintained by the Foundation Center. Corporate giving programs, however, are more difficult to research because no disclosure of giving is required. As a result, while it is possible to determine where corporate giving programs exist and what their areas of focus are, it is not typically possible to determine the amount of giving (either in total or directed to particular focus areas).

Corporations gave \$13 billion in 2003. Most often, corporations engage in charitable giving in a variety of ways and are often motivated by the desire to develop and enhance the public image and goodwill of its business. Some corporations establish foundations, which operate as independent, tax-exempt private foundations. These foundations often start with a single endowment gift, to which the company adds future contributions. The foundation's officers are often company owners and key executives, although leaders from headquarters communities are sometimes included.

Other companies have corporate giving programs with no independent endowment that are typically administered by corporate staff and directed by the CEO or an advisory committee of management staff members. And some companies, either in addition to or in lieu of awarding financial grants, offer to match their employees' gifts of cash and volunteer time to nonprofit organizations. Finally, many corporations offer in-kind gifts, such as the products sold or manufactured by the corporation, or equipment and supplies needed to support organizations and programs.

As compared to foundations, corporate contributions are more likely to be a one-time gift as opposed to sustained giving for a particular program or issue – for example, to help fund an event.

Below is a list of 52 corporate foundations and corporate giving programs that awarded grants in California in 2003 in areas of interest to the Youth Investment Program. As you can see, this table includes corporations based both in California and elsewhere.

CORPORATE GIVING PROGRAM/ FOUNDATION	LOCATION	AREA(S) OF FOCUS	TOTAL GIVING (2003)
Altria Group, Inc. Corporate Giving Program	New York, NY	Environment, Youth Development	\$138,300,000
SAP America, Inc. Corporate Giving Program	Washington, DC	Education, Economically Disadvantaged (giving in CA limited to Bay Area)	\$103,400,000
Coca-Cola Company Contributions Program, The	Atlanta, GA	Environment, Youth Development	\$37,482,973
3M Company Contributions Program	St. Paul, MN	Environment, Youth Development	\$29,567,000
Freddie Mac Foundation	McLean, VA	Education, Youth Development	\$24,337,252
Eastman Kodak Company Contributions Program	Rochester, NY	Environment, Education, Youth	\$16,585,088

CORPORATE GIVING PROGRAM/ FOUNDATION	LOCATION	AREA(S) OF FOCUS	TOTAL GIVING (2003)
Anheuser-Busch Foundation	St. Louis, MO	Youth Development, Environmental Conservation	\$14,999,334
Amgen Foundation, Inc.	Thousand Oaks, CA	Environment, Education, Recreation	\$10,897,549
Sempra Energy Corporate Giving Program	San Diego, CA	Environment, Education, (central CA)	\$8,442,000
PG&E Corporation Contributions Program	San Francisco, CA	Environment, Natural Resources, Education	\$6,999,714
Alaska Airlines, Inc. Corporate Giving Program	Seattle, WA	Environment, Education	\$5,556,304
Gap Foundation, The	San Francisco, CA	Youth Development, Economically Disadvantaged	\$5,456,964
Sprint Foundation	Overland Park, KS	Youth Development, Environment, Minorities	\$5,273,080
McKesson Foundation, Inc.	San Francisco, CA	Youth Development, Economically Disadvantaged	\$4,199,974
Clorox Company Foundation, The	Oakland, CA	Youth Development	\$4,162,435
PacifiCare Health Systems Foundation	Santa Ana, CA	Youth Development, At-risk Youth	\$3,608,637
The Walt Disney Company Foundation	Burbank, CA	Environment, Education	\$3,327,946
Hofmann Foundation, The	Concord, CA	Environment, Natural Resources, Youth, Education	\$2,537,510
Bay Bancorp Foundation, Greater	Palo Alto, CA	Environment, Education, Youth	\$1,369,972
Autodesk, Inc. Corporate Giving Program	San Rafael, CA	Environment, Education	\$1,035,500
Teichert Foundation	Sacramento, CA	Environment, Education, (Sacramento, Central Valley)	\$553,799
Sierra Pacific Foundation	Redding, CA	Environment, Youth, Recreation	\$496,729
Give Something Back, LLC Corporate Giving Program	Oakland, CA	Environment, Education	\$405,856
Romic Environmental Technologies Corp. Contributions Program	East Palo Alto, CA	Environment, Education, Youth	\$34,000
Gateway Foundation	Poway, CA	Environment, Education, Natural Resources	\$0
Adobe Systems Incorporated Corporate Giving Program	San Jose, CA	Environment, Education, Disadvantaged Youth	N/A
Ariba, Inc. Corporate Giving Program	Sunnyvale, CA	Environment, Education	N/A
Birkenstock Footprint Sandals, Inc. Corporate Giving Program	Novato, CA	Environment, Education	N/A
Blue Diamond Growers Corporate Giving Program	Sacramento, CA	Youth Development, (focus on Sacramento area)	N/A

CORPORATE GIVING PROGRAM/ FOUNDATION	LOCATION	AREA(S) OF FOCUS	TOTAL GIVING (2003)
Chevron Corporation Contributions Program	San Ramon, CA	Environment, Education, Natural Resources	N/A
Country Sun Natural Foods Corporate Giving Program	Palo Alto, CA	Environment, Youth Development, Recreation	N/A
Disney Company Contributions Program, Walt, The	Burbank, CA	Education, Natural Resources	N/A
DuPont Corporate Giving Program	Wilmington, DE	Environment, Education, Economically Disadvantaged	N/A
Foster Farms, Inc. Corporate Giving Program	Livingston, CA	Education, Children's Services (Merced & Stanislaus Counties)	N/A
Home Depot, Inc. Corporate Giving Program, The	Atlanta, GA	Environment, Youth Development	N/A
McAfee, Inc. Corporate Giving Program	Santa Clara, CA	Youth, Environment, Education	N/A
Mechanics Bank Corporate Giving Program, The	Richmond, CA	Youth Development, Education	N/A
New United Motor Manufacturing, Corporate Giving Program	Fremont, CA	Environment, Education	N/A
Oracle Corporation Contributions Program	Redwood City, CA	Environmental Education	N/A
PowerBar Inc. Corporate Giving Program	Berkeley, CA	Natural Resources, REC	N/A
REI Corporate Giving Program	Kent, WA	Environment, Youth Development, Recreation	N/A
Save Mart Supermarkets Corporate Giving Program	Modesto, CA	Environment, Youth, Recreation	N/A
SGI Corporate Giving Program	Mountain View, CA	Environment, Education	N/A
Shaklee Corporation Contributions Program	Pleasanton, CA	Environment, Education	N/A
Traditional Medicinals Corporate Giving Program	Sebastopol, CA	Environment, Education, (focus on Sebastopol)	N/A
Union Bank of California, N.A. Corporate Giving Program	Los Angeles, CA	Education, Youth Development	N/A
WD-40 Company Contributions Program	San Diego, CA	Education, Youth Development	N/A
West Marine, Inc. Corporate Giving Program	Watsonville, CA	Environment, Youth, Water Resources	N/A
Western Digital Corporation Contributions Program	Lake Forest, CA	Education, Youth, Minorities	N/A
Working Assets Funding Service, Inc. Corporate Giving Program	San Francisco, CA	Environment, Education	N/A

Corporations often used their most valuable asset—their employees—when engaging in community relations and/or corporate giving. In addition to making grants, corporations often partner up with service providers to set up ‘volunteer days’ or establish long-term relationships that provide the nonprofit with resources such as manpower and technical expertise.

Below we include examples of such partnerships that may intersect with the Youth Investment Program's goals.

- ***Building / refurbishing playgrounds:*** Home Depot supports the communities in which it operates through a combination of philanthropy and volunteer efforts. The company's 2004 philanthropic budget was approximately \$25 million, and it has donated more than \$150 million since 1989. Funds are directed to a variety of community efforts including building and refurbishing playgrounds for children. In addition, every store or facility has a Team Depot volunteer program. In 2003, Home Depot gave time and money to a partnership with KaBOOM! to build or refurbish more 100 playgrounds.
- ***Maintaining park / open spaces:*** PG&E maintains recreational facilities from the Pit River country in the Cascade Range to the King's River region in the southern Sierra Nevada. Man-made lakes used for hydroelectric power – such as such as Almanor, Spaulding and Britton – are available for swimming, fishing and boating. Reservoir areas are also open to the public for camping and picnics.
- ***Restoring natural resources:*** The Chevron Corporation encourages community involvement efforts to demonstrate the company's role as a partner in the communities in which it operates. In one Chevron-sponsored program, employees have helped restore Yosemite National Park's oak woodlands, meadows and lakes. Chevron has donated more than \$2 million since 1990, and 3,000 employees have devoted nearly 37,000 hours of volunteer time to restore the equivalent of 60 football fields in Yosemite Valley. The donations were made to the nonprofit Yosemite Fund, and volunteer efforts were directed by the National Park Service. Employee volunteers planted trees, re-landscaped areas damaged by overuse, restored areas around Mirror Lake, reconfigured trails, and restored Cook's Meadow by removing non-native plants, artificial ditches and an abandoned roadway.

III. PUBLIC SOURCES OF SUPPORT

The following section focuses on public sources of support for programs that provide underserved youth with access to parks and environmental programs and/or for the parks and open spaces necessary for such programs, namely the California State Budget and state bonds.

A. CALIFORNIA DEPARTMENT OF PARKS AND RECREATION

A significant amount of the public funds provided for park and wilderness areas in California – including programs specifically dedicated to providing and maintaining such spaces for youth in underserved communities – come from the California Department of Parks and Recreation. Organized into 18 districts, the department is responsible for managing nearly 1.4 million acres, with over 280 miles of coastline; 625 miles of lake and river frontage; nearly 15,000 campsites; and 3,000 miles of hiking, biking, and equestrian trails.

The districts defined by the Parks and Recreation department do not coincide geographically with the service area divisions defined by PG&E. As a result, it is not possible in this analysis to determine public funding allocation within PG&E divisions or for the PG&E service territory as a whole. Moreover, neither the state budget nor the website for the Parks and Recreation Department detail the distribution of funds by district. It may be possible to obtain further information about district-specific funding by contacting individual districts. Initial attempts to obtain such information were unsuccessful. A list of Parks and Recreation department districts, along with contact information, is attached as Appendix IV.

Following are highlights of the 2004-05 California Department of Parks and Recreation budget as provided for in the California state budget.³ Most salient to note is the appearance of a severe drop-off in support for local assistance in the last year.

DEPARTMENT OF PARKS AND RECREATION	2002-03	2003-04	2004-05
State Operations			
General Fund	\$128,563	\$97,295	\$82,316
Safe Neighborhood Parks, Clean Water, Clean Air, and Coastal Protection Bond Fund (Proposition 12)	\$12,496	\$23,892	\$12,441
Habitat Conservation Fund	\$31	\$30	–
State Parks and Recreation Fund	\$76,975	\$96,735	\$117,079
Winter Recreation Fund	\$285	\$339	\$342
California Clean Water, Clean Air, Safe Neighborhood Parks, and Coastal Protection Fund (Proposition 40)	\$13,386	\$12,174	\$10,052
Water Security, Clean Drinking Water, Coastal and Beach Protection Fund of 2002	–	\$390	\$390
Local Assistance			
General Fund	\$3,280	–	–
Safe Neighborhood Parks, Clean Water, Clean Air, and Coastal Protection Bond Fund (Proposition 12)	\$253,531	\$44,744	–
Habitat Conservation Fund	\$1,950	\$2,705	\$3,705
Natural Resources Infrastructure Fund	–	\$7,956	–
California Wildlife, Coastal and Park Land Conservation Fund of 1988	–	\$8	–
Recreational Trails Fund	\$3,061	\$9,549	\$6,200
California Clean Water, Clean Air, Safe Neighborhood Parks, and Coastal Protection Fund (Proposition 40)	\$71,985	\$745,469	–

³ The state budget is available on the California Department of Finance website: http://www.dof.ca.gov/HTML/BUD_DOCS/Bud_link.htm.

B. PROPOSITIONS / BOND ACTS

Voter-approved propositions have provided significant funding for the protection and enhancement of California’s parks, open spaces and natural resources, as well as for programs intended to benefit youth in underserved areas.

2000 Bond Act - Proposition 12

On March 7, 2000, voters passed Proposition 12, the 2.1 billion dollar "Safe Neighborhood Parks, Clean Water, Clean Air and Coastal Protection Bond Act of 2000." The Act was intended to revive state stewardship of natural resources by investing in neighborhood parks and state parks, clean water protection, and coastal beaches and scenic areas.

2002 Bond Act – Proposition 40

On March 5, 2002, voters approved Proposition 40, the California Clean Water, Clean Air, Safe Neighborhood Parks, and Coastal Protection Fund. The Proposition authorized the state to borrow \$2.6 billion through the sale of general obligation bonds for the development, restoration, and acquisition of state and local parks, recreation areas and historical resources, and for land, air, and water conservation programs.

PROPOSITION 40 OVERVIEW

There is substantial programmatic intersection between the Youth Investment Program’s goals and the aims and authorized programs under Proposition 40. At a minimum, a review of Proposition 40’s five programs provides a view of current publicly-funded efforts in these areas. In addition, there may be opportunities for using grant programs as models for Youth Investment Program work and/or partnering with grant recipients. Below is an overview of the distribution of funds and the five programs specifically authorized.

Of the \$2.6 billion available, funds were allocated as follows:⁴

PROPOSITION 40				
	Total Bond Act	Appropriated Total 2002-03 and 2003-04	2004-05	Available for Subsequent Years
Local Governments	\$870,000	\$738,938	\$2,815	\$78,413
Cultural and Historical	\$230,000	\$219,911	\$1,636	\$332
River Parkways	\$75,000	\$61,785	\$608	\$7,850
Conservancies	\$445,000	\$304,196	\$2,395	\$109,015
State Parks	\$225,000	\$132,382	\$9,762	\$29,554
Wildlife Conservation Board	\$300,000	\$90,077	\$439	\$185,282
Air Resources Board	\$50,000	\$48,000	–	–
Conservation Corps	\$20,000	\$9,299	–	–
Clean Beaches	\$300,000	\$239,503	\$1,204	\$39,620
Ag, Grazing, Oak Woodlands, Urban Forests	\$85,000	\$34,000	\$529	\$16,589
<i>All dollars in thousands. Set asides not included.</i>				

⁴ Proposition 40 details may also be found on the Finance department website listed above.

Proposition 40 Authorized Programs

Proposition 40 authorized a number of grant programs intended to meet the urgent need for local park and recreational facilities that provide “positive alternatives to social problems.”⁵

Below are brief descriptions of the programs:⁶

1. Murray-Hayden Urban Parks and Youth Service Grant Program

Allocated Funds: \$46.675 million

Program Focus: capital projects, including parks, park facilities, environmental enhancement projects, youth centers, and environmental youth service centers that will employ neighborhood residents and at-risk youth, and are within immediate proximity of a neighborhood that has been identified by the Department as having:

- A critical lack of parks and open space land and/or deteriorated park facilities
- A shortage of services for youth
- Significant poverty
- Significant unemployment

2. Roberti-Z'berg-Harris Open Space and Recreation Grant Program

Allocated Funds: \$186.7 million

Program Focus: projects focused on one or more of the following:

- Acquisition (open space areas; historical sites and structures; lands and structures to be converted to recreational use)
- Development/Rehabilitation (parks; recreational facilities; historical sites within parks or recreational facilities)
- Special Major Maintenance (of park and recreation lands)
- Innovative Recreation Programs (activities intended to respond to the unique and otherwise unmet recreation needs of special urban populations, including "latchkey" children and minorities; included here are special transportation programs designed to facilitate access of these groups to parks and recreational programs and facilities)

⁵ Guidelines for grants are outlined on the Department of Parks and Recreation website: http://www.parks.ca.gov/?page_id=21365.

⁶ Further details are available at http://www.parks.ca.gov/default.asp?page_id=21876.

The Harris Open Space program is divided into three subparts:

GRANT TYPE	AMOUNT AWARDED	GEOGRAPHIC FOCUS OF GRANTS
Block Grants	\$154.961 million	Cities, counties, and districts in urbanized and heavily urbanized areas
Urbanized Area Need Basis Grants	\$3.884 million	Cities, recreation and park districts, and Indian tribes in urbanized areas (central cities per the census, and counties with > 200,000 population)
Non-urbanized Area Need Basis Grants	\$27.855 million	Cities, counties, districts and California tribes in non-urbanized areas

3. Youth Soccer and Recreation Development Program

- Allocated Funds: \$ 23,338 million
- Program Focus: projects by local agencies and community-based organizations to foster the development of new youth soccer, baseball, softball and basketball recreation opportunities in California.

4. State Urban Parks and Healthy Communities Program

- Allocated Funds: \$23.338 million
- Program Focus: the acquisition and development of properties for activities that require athletic fields, courts, gymnasiums or other recreational facilities/venues for youth soccer, baseball, football, basketball, tennis or swimming.

5. Urban Park Act of 2001 Program

- Allocated Funds: \$ 130.690 million
- Program Focus: the acquisition and development of parks, recreation areas and facilities in neighborhoods currently least served by park and recreation providers. The Act notes that these neighborhoods often suffer most from high unemployment and destructive or unlawful conduct by youth. The Act also encourages community participation in, and responsibility for, new urban parks, new recreational facilities and new multipurpose facilities.

Proposition 40 Grantees

Grantees have been selected for the Murray-Hayden Grant Program and the Urban Park Act of 2001 Program. A list of grantees, including projects and amounts awarded is attached as Appendix V. The Parks and Recreation Department is currently in the process of selecting grantees for the remaining programs outlined above, and decisions are expected to be announced in late summer 2005.

IV. CONCLUSIONS AND RECOMMENDATIONS

There are numerous opportunities for Youth Investment Program to invest its resources strategically in order to make the most significant impact. The field is ripe for the Youth Investment Program to position itself as a key funder in the field of environmental education and parks grantmaking. The Program will have the opportunity to convene and leverage from a variety of sources. However, this relatively large role in the field will put pressure on the Program to manage the fields' expectations, and demand will invariably exceed available support.

Conclusions & Observations

- Funding for the Youth Investment Program's areas of interest is limited when compared to overall environmental or education giving. And while this analysis is forced to be somewhat impressionistic due to the crude nature of the data, it is clear that financial resources for supporting environmental and outdoor education and parks and recreational spaces comprise a very small portion of the philanthropic pie. Further, it also reveals that support for environmental and outdoor education and parks is limited, irregular and difficult to identify. Herein lies a great prospect for YIP to play a leading role in galvanizing funders to increase support to parks and environmental and outdoor education in underserved communities.
- The Youth Investment Program's goals of reaching underserved youth will help meet a critical need. This funding analysis clearly indicates that while private foundations tend to invest in environmental education (at \$30 million over the last three years), of these resources, a limited portion of it appears to specifically reach youth (\$13.5 million), and an even smaller portion reaches minority youth (\$3.3 million). It is the same case with supporting parks and playgrounds: current support for parks and playgrounds by non-public financing sources is currently at an extraordinary low level (\$2.2 million), presumably due to the infusion of Proposition 40 support.
- The Youth Investment Program can play a leading role among its peers. The Program's annual budget available for grantmaking is equal to or exceeds the total giving by private foundations to "environment and youth," "environmental education and youth", "natural resources and youth," and "parks/playgrounds."
- Because more a robust philanthropic and nonprofit culture exists in more urban areas, an opportunity exists for YIP to increase the level of awareness and resources in non-urban contexts. Community foundations can play a particularly critical role in assisting the YIP in this, should it decide to do so.
- Public funding will be increasingly scarce given the current State budget's constraints. However, the Youth Investment Program's goals are tightly aligned with Proposition 40, and it would be well served to look to this source for possible synergies, as well as a list of potential grantees to support.
- Project grants from private foundations tend to be smaller, at about \$50,000, while parks/playground infrastructure grants hover around \$100,000. This is a valuable benchmark for YIP as it considers how it can best accomplish its goals.

Recommendations

- The Youth Investment Program has an opportunity to assert its leadership by way of convening and leveraging organizational resources across the territory. Given the relatively small size of this “market” and the limited number of players, YIP should assess what role it can play among its funding peers to leverage its own resources and expertise.
- Partnership and collaboration with other funders—both private and community—will enable the Youth Investment Program to leverage its \$3 million dollars and bring together the strengths and capacity of different organizations.
- The Youth Investment Program should consider partnering with community foundations. Community foundations can provide the necessary local knowledge and expertise for awarding grants to communities across PG&E territory. Community foundations also count with a strong network of contacts among local donors and corporation. Finally, these can also make available a ready infrastructure that can make small grants that the Council may not wish to be set up to do. The Program should also explore developing relationships with those community foundations present in areas with watershed lands.
- Similarly, the Youth Investment Program should consider conducting outreach to private foundations. Private foundations can bring substantial resources to an issue. Key potential partners might include health-related private foundations such as California Wellness or the California Endowment. Smaller private foundations may also provide key opportunities for partnership. It will be important for the YIP to both learn from and educate private foundations on this issue; private foundations can tend to remain isolated and not venture into new areas very comfortably. YIP can educate them on the needs of its territory’s communities, and hopefully increase the level of resources going to these communities.
- The Youth Investment Program should look closely at how it can develop synergies with Proposition 40 monies. Specifically, YIP should considering working in tandem with the Murray-Hayden Urban Parks and Youth Service and the Roberti-Z’berg-Harris Open Space and Recreation Grant Programs. Concurrently, the Program should assess whether its limited resources are best spent on programs that are being supported by Proposition 40.
- In light of the current fiscal state of California, the Youth Investment Program should consider building relationships with service providers in the field in order to successfully lobby Sacramento for increased funding for the Programs’ areas of interest.