

Oral History Center
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University of California
Berkeley, California

Ronnie Caplane

Ronnie Caplane: On Friendship with Marion and Herb

The Marion and Herbert Sandler Oral History Project

Interviews conducted by
Martin Meeker
in 2018

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Ronnie Caplane, "Ronnie Caplane: On Friendship with Marion and Herb," Marion and Herbert Sandler Oral History Project, conducted by Martin Meeker in 2018, Oral History Center, The Bancroft Library, University of California, Berkeley, 2019.



Ronnie Caplane

Ronnie Caplane is an attorney and a close friend to Marion and Herb Sandler. She graduated from the University of California, Hastings College of the Law in 1972, worked in private practice as an attorney, and eventually served on the California Workers' Compensation Appeals Board. In this interview, Ms. Caplane discusses: family background and upbringing; education and interest in the law; career in litigation; meeting and becoming friends with Marion and Herb Sandler; and her observations and interactions with the Sandlers over the course of several decades.

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Project History: the Marion and Herb Sandler Oral History Project

Herb Sandler and Marion Osher Sandler formed one of the most remarkable partnerships in the histories of American business and philanthropy—and, if their friends and associates would have a say in things, in the living memory of marriage writ large. This oral history project documents the lives of Herb and Marion Sandler through their shared pursuits in raising a family, serving as co-CEOs for the savings and loan Golden West Financial, and establishing a remarkably influential philanthropy in the Sandler Foundation. This project consists of eighteen unique oral history interviews, at the center of which is a 24-hour life history interview with Herb Sandler.

Marion Osher Sandler was born October 17, 1930, in Biddeford, Maine, to Samuel and Leah Osher. She was the youngest of five children; all of her siblings were brothers and all went on to distinguished careers in medicine and business. She attended Wellesley as an undergraduate where she was elected into Phi Beta Kappa. Her first postgraduate job was as an assistant buyer with Bloomingdale's in Manhattan, but she left in pursuit of more lofty goals. She took a job on Wall Street, in the process becoming only the second woman on Wall Street to hold a non-clerical position. She started with Dominick & Dominick in its executive training program and then moved to Oppenheimer and Company where she worked as a highly respected analyst. While building an impressive career on Wall Street, she earned her MBA at New York University.

Herb Sandler was born on November 16, 1931 in New York City. He was the second of two children and remained very close to his brother, Leonard, throughout his life. He grew up in subsidized housing in Manhattan's Lower East Side neighborhood of Two Bridges. Both his father and brother were attorneys (and both were judges too), so after graduating from City College, he went for his law degree at Columbia. He practiced law both in private practice and for the Waterfront Commission of New York Harbor where he worked on organized crime cases. While still living with his parents at Knickerbocker Village, he engaged in community development work with the local settlement house network, Two Bridges Neighborhood Council. At Two Bridges he was exposed to the work of Episcopal Bishop Bill Wendt, who inspired his burgeoning commitment to social justice.

Given their long and successful careers in business, philanthropy, and marriage, Herb and Marion's story of how they met has taken on somewhat mythic proportions. Many people interviewed for this project tell the story. Even if the facts don't all align in these stories, one central feature is shared by all: Marion was a force of nature, self-confident, smart, and, in Herb's words, "sweet, without pretensions." Herb, however, always thought of himself as unremarkable, just one of the guys. So when he first met Marion, he wasn't prepared for this special woman to be actually interested in dating him. The courtship happened reasonably quickly despite some personal issues that needed to be addressed (which Herb discusses in his interview) and introducing one another to their respective families (but, as Herb notes, not to seek approval!).

Within a few years of marriage, Marion was bumping up against the glass ceiling on Wall Street, recognizing that she would not be making partner status any time soon. While working as an analyst, however, she learned that great opportunity for profit existed in the savings and loan sector, which was filled with bloat and inefficiency as well as lack of financial sophistication and incompetence among the executives. They decided to find an investment opportunity in California and, with the help of Marion's brothers (especially Barney), purchased a tiny two-branch thrift in Oakland, California: Golden West Savings and Loan.

Golden West—which later operated under the retail brand of World Savings—grew by leaps and bounds, in part through acquisition of many regional thrifts and in part through astute research leading to organic expansion into new geographic areas. The remarkable history of Golden West is revealed in great detail in many of the interviews in this project, but most particularly in the interviews with Herb Sandler, Steve Daetz, Russ Kettell, and Mike Roster, all of whom worked at the institution. The savings and loan was marked by key attributes during the forty-three years in which it was run by the Sandlers. Perhaps most important among these is the fact that over that period of time the company was profitable all but two years. This is even more remarkable when considering just how volatile banking was in that era, for there were liquidity crises, deregulation schemes, skyrocketing interest rates, financial recessions, housing recessions, and the savings and loan crisis of the 1980s, in which the entire sector was nearly obliterated through risky or foolish decisions made by Congress, regulators, and managements. Through all of this, however, Golden West delivered consistent returns to their investors. Indeed, the average annual growth in earnings per share over 40 years was 19 percent, a figure that made Golden West second only to Warren Buffett's Berkshire Hathaway, and the second best record in American corporate history.

Golden West is also remembered for making loans to communities that had been subject to racially and economically restrictive redlining practices. Thus, the Sandlers played a role in opening up the dream of home ownership to more Americans. In the offices too, Herb and Marion made a point of opening positions to women, such as branch manager and loan officer, previously held only by men. And, by the mid-1990s, Golden West began appointing more women and people of color to its board of directors, which already was presided over by Marion Sandler, one of the longest-serving female CEOs of a major company in American history. The Sandlers sold Golden West to Wachovia in 2006. The interviews tell the story of the sale, but at least one major reason for the decision was the fact that the Sandlers were spending a greater percentage of their time in philanthropic work.

One of the first real forays by the Sandlers into philanthropic work came in the wake of the passing of Herb's brother Leonard in 1988. Herb recalls his brother with great respect and fondness and the historical record shows him to be a just and principled attorney and jurist. Leonard was dedicated to human rights, so after his passing, the Sandlers created a fellowship in his honor at Human Rights Watch. After this, the Sandlers giving grew rapidly in their areas of greatest interest: human rights, civil rights, and medical research. They stepped up to become major donors to Human Rights Watch and, after the arrival of Anthony Romero in 2001, to the American Civil Liberties Union.

The Sandler's sponsorship of medical research demonstrates their unique, creative, entrepreneurial, and sometimes controversial approach to philanthropic work. With the American Asthma Foundation, which they founded, the goal was to disrupt existing research patterns and to interest scientists beyond the narrow confines of pulmonology to investigate the disease and to produce new basic research about it. Check out the interview with Bill Seaman for more on this initiative. The Program for Breakthrough Biomedical Research at the University of California, San Francisco likewise seeks out highly-qualified researchers who are willing to engage in high-risk research projects. The interview with program director Keith Yamamoto highlights the impacts and the future promise of the research supported by the Sandler's. The Sandler Fellows program at UCSF selects recent graduate school graduates of unusual promise and provides them with a great deal of independence to pursue their own research agenda, rather than serve as assistants in established labs. Joe DeRisi was one of the first Sandler Fellows and, in his interview, he describes the remarkable work he has accomplished while at UCSF as a fellow and, now, as faculty member who heads his own esteemed lab.

The list of projects, programs, and agencies either supported or started by the Sandler's runs too long to list here, but at least two are worth mentioning for these endeavors have produced impacts wide and far: the Center for American Progress and ProPublica. The Center for American Progress had its origins in Herb Sandler's recognition that there was a need for a liberal policy think tank that could compete in the marketplace of ideas with groups such as the conservative Heritage Foundation and the American Enterprise Institute. The Sandler's researched existing groups and met with many well-connected and highly capable individuals until they forged a partnership with John Podesta, who had served as chief of staff under President Bill Clinton. The Center for American Progress has since grown by leaps and bounds and is now recognized for being just what it set out to be.

The same is also true with ProPublica. The Sandler's had noticed the decline of traditional print journalism in the wake of the internet and lamented what this meant for the state of investigative journalism, which typically requires a meaningful investment of time and money. After spending much time doing due diligence—another Sandler hallmark—and meeting with key players, including Paul Steiger of the Wall Street Journal, they took the leap and established a not-for-profit investigative journalism outfit, which they named ProPublica. ProPublica not only has won several Pulitzer Prizes, it has played a critical role in supporting our democratic institutions by holding leaders accountable to the public. Moreover, the Sandler Foundation is now a minority sponsor of the work of ProPublica, meaning that others have recognized the value of this organization and stepped forward to ensure its continued success. Herb Sandler's interview as well as several other interviews describe many of the other initiatives created and/or supported by the foundation, including: the Center for Responsible Lending, Oceana, Center on Budget and Policy Priorities, Learning Policy Institute, and more.

A few interviewees shared the idea that when it comes to Herb and Marion Sandler there are actually three people involved: Marion Sandler, Herb Sandler, and “Herb and Marion.” The later creation is a kind of mind-meld between the two which was capable of expressing opinions, making decisions, and forging a united front in the ambitious projects that they accomplished. I think this makes great sense because I find it difficult to fathom that two individuals alone could do what they did. Because Marion Sandler passed away in 2012, I was not able to interview her, but I am confident in my belief that a very large part of her survives in Herb’s love of “Herb and Marion,” which he summons when it is time to make important decisions. And let us not forget that in the midst of all of this work they raised two accomplished children, each of whom make important contributions to the foundation and beyond. Moreover, the Sandlers have developed many meaningful friendships (see the interviews with Tom Laqueur and Ronnie Caplane), some of which have spanned the decades.

The eighteen interviews of the Herb and Marion Sandler oral history project, then, are several projects in one. It is a personal, life history of a remarkable woman and her mate and life partner; it is a substantive history of banking and of the fate of the savings and loan institution in the United States; and it is an examination of the current world of high-stakes philanthropy in our country at a time when the desire to do good has never been more needed and the importance of doing that job skillfully never more necessary.

Martin Meeker, Charles B. Faulhaber Director, Oral History Center, UC Berkeley

List of Interviews of the Marion and Herbert Sandler Oral History Project

Ronnie Caplane, “Ronnie Caplane: On Friendship with Marion and Herb.”

Steve Daetz, “Steve Daetz: Values and Leadership at Golden West Financial and the Sandler Foundation.”

Joseph DeRisi, “Joe DeRisi: From Sandler Fellow to UCSF Professor of Biochemistry.”

Stephen Hauser, “Stephen Hauser: Establishing the Sandler Neurosciences Center at UCSF.”

Russell Kettell, “Russ Kettell: A Career with Golden West Financial.”

Thomas Laqueur, “Tom Laqueur: On the Meaning of Friendship.”

Bernard Osher, “Barney Osher: On Marion Osher Sandler.”

John Podesta, “John Podesta: Building Infrastructure for Progressive Politics with the Center for American Progress.”

Anthony Romero, “Anthony Romero: Leadership of the American Civil Liberties Union in Times of Crisis.”

Michael Roster, “Michael Roster: Attorney and Golden West Financial General Counsel.”

Kenneth Roth, “Kenneth Roth: Human Rights Watch and Achieving Global Impact.”

Herbert Sandler, “Herbert Sandler: A Life with Marion Osher Sandler in Business and Philanthropy.”

James Sandler, “Jim Sandler: Commitment to the Environment in the Sandler Foundation.”

Susan Sandler, “Susan Sandler: The Sandler Family and Philanthropy.”

William Seaman, “Bill Seaman: The American Asthma Foundation.”

Paul Steiger, “Paul Steiger: Business Reporting and the Creation of ProPublica.”

Richard Tofel, “Richard Tofel: The Creation and Expansion of ProPublica.”

Keith Yamamoto, “Keith Yamamoto: The Sandler Foundation and the Program in Breakthrough Biomedical Research at UCSF.”

Interview 1: March 27, 2018

01-00:00:00

Meeker:

Today is March 27, 2018. This is Martin Meeker interviewing Ronnie Caplane for the Marion and Herb Sandler Oral History Project. We are here at Ronnie's home in Oakland, California—and this is the first interview session. So thank you again for joining me today. We begin these interviews the same for everyone, and that is just tell me your name, and date and place of birth.

01-00:00:32

Caplane:

My name is Ronnie Caplane, and I was born on December 2, 1948 in Omaha Nebraska.

01-00:00:43

Meeker:

Can you tell me a little bit about the family that you were born into?

01-00:00:45

Caplane:

My mother was your traditional stay-at-home mother, although she'd been a drama major in college, so there was a lot of dramatics around the house. My father managed a theater. When I was about seven or eight years old—and my sister was approximately three years younger than I—we moved to Cleveland, Ohio, which is where I was raised. And with a stopover in Kansas City on our way to Cleveland, I guess Cleveland looked good compared to Kansas City and Omaha. That's where my parents were from and we had a lot of family, and I went to high school. When I graduated high school, I went to Ohio University in southern Ohio, in Athens, Ohio for two years, and then I transferred to the University of Wisconsin and gradually moved my way west from there. I came to California in the end of September of 1970 to be a Vista volunteer, which was a Kennedy Administration domestic Peace Corps, and I was stationed in San Francisco, went to law school two years later—and never left.

01-00:01:57

Meeker:

Tell me about the Vista work. That sounds fascinating.

01-00:02:00

Caplane:

It was great. It was great. That was the era when all of this stuff was going on, and it was—the job I had, I was placed on—it was called the Own-Recognizance Free Bail Project, where we interviewed people and made recommendations as to whether or not they had sufficient ties to the community, the nature of the crime, and so forth, and we would make a recommendation that people would be released on their own recognizance rather than having to post bail. Which is very interesting now, because this is now, years and years later, has become the issue du jour with an appellate court decision about it.

01-00:02:39

Meeker:

Where did you live when you first moved out to the Bay Area?

01-00:02:40

Caplane: San Francisco. I lived in San Francisco.

01-00:02:42

Meeker: Where in San Francisco?

01-00:02:42

Caplane: When I was training in Vista we lived at a residency hotel on Hyde Street. I don't think it's there anymore. And then I lived in—sort of Noe Valley areas, renting apartments. It was a very different—*very* different time then. The big issue of the time, at the moment, was building the Alcoa Building, the Transamerica Pyramid Building—I think it has been the Alcoa—anyway, the Transamerica Pyramid, and that was a big controversy, because it was going to be taller than the Ferry Building, and it was going to completely change the skyline of San Francisco—and we know what happened to that since.

01-00:03:28

Meeker: You said you went to law school.

01-00:03:29

Caplane: Yeah, I went to Hastings Law School.

01-00:03:30

Meeker: Hastings.

01-00:03:31

Caplane: Yeah.

01-00:03:31

Meeker: What year did you graduate there?

01-00:03:33

Caplane: Nineteen seventy-five.

01-00:03:38

Meeker: What kind of law were you interested in practicing?

01-00:03:40

Caplane: Well, I went into law school because I thought I wanted to be in criminal law, but I didn't—when I graduated—as with most lawyers, unless you've got a family business to go into, you practice the kind of law where you get a job. [Meeker laughs] So the job I got was in personal injury, and so I did personal injury, I did aviation, some aviation litigation working for the federal government. That was another job, not my initial out-of-law-school job, but doing some admiralty law and workers' comp, back with a private firm after a while.

01-00:04:13

Meeker: So you moved from a private firm to the public sector and back to the private?

01-00:04:17

Caplane:

Back to a private firm, yeah. And then I ended my career in a public—I had a very long hiatus when I—I met my husband in 1977. His name was Joe Remcho. We each kept our own last names. My best friend—still my best friend—introduced me to him. The joke was that she went out with him a few times. She didn't want him permanently, but she knew he was too good to throw back, so she introduced us to each other. This was a time when all that stuff happened, so we met, we married—I can't remember where I started with this—but anyway, so I took a long hiatus from the law. I was practicing law working with the federal government, then working with someone in private practice. And when our children were, I guess, five and three, four and six, something like that, we decided that I would stay home and do full-time parenting, which is what I wanted to do. So I did that, and you, of course, take your personality with you, so I was very active in the schools. Eventually I got elected to the Piedmont school board. I was very active in my temple, very involved in the kids' lives.

And then after my husband passed away—he died in an accident in January of 2003—I needed to go back to work, not only financially, but also emotionally, because I had been doing a lot of freelance writing at the time for various—I had a weekly column, a first-person column in some local newspapers, and I was doing writing for the *Jewish Bulletin* and the *Montclairion*, and other things. And that's a very—freelance writing is a very isolating—and you need to really be self-driven in order to—so I needed to find something that was more structured, gave my life more structure, because the kids were off at college, and I didn't have Joe anymore, so I went back to work.

And actually Herb and Marion were instrumental in my going back to work, because they ran into someone who had been a mutual friend of ours and they said, “What are you going to do to help Ronnie?” The person was Tony Kline, who was Jerry Brown's legal affairs advisor the first time Brown was governor. And there was sort of the triumvirate which was Governor Brown, Tony, and then Gray Davis, who was his chief of staff. At that time Gray Davis was governor, and my husband had—Joe had represented Gray, as well as many of the legislators in the Democratic Party, and so forth. So Tony—and it was clearly, it was Herb and Marion running into him and saying—but that's who they are. That's really who they are. And they said that to him, and so he started thinking, and he came over—and he engineered my appointment to the Workers' Compensation Appeals Board, which is a state agency. Tell me if this gets too boring or I'm going on too long here.

01-00:07:41

Meeker:

Keep going, keep going!

01-00:07:43

Caplane:

Because these things are interesting to me, but the rest of the world—I don't understand why they could not find workers' comp just so interesting, but there you go.

01-00:07:51

Meeker:

We do a lot of interviews around government work, so yes, it's—

01-00:07:55

Caplane:

Well, it was very interesting. Workers' comp really is an area of law—I think even among lawyers it's sort of the stepchild of the law, because it's an administrative proceeding, and they think attorneys that do workers' comp are not real lawyers, and so forth. But the fact is that it is—for some reason, it's a hot-button item. In Schwarzenegger's administration there were massive changes to the law, the biggest reforms or changes that, I think, the system's ever seen. Brown put his signature on it this time, with his own set of reforms, and it affects the lives of individuals, and it certainly affects the state's economy and businesses, and so forth. Anyway, so the Workers' Compensation Appeals Board is the equivalent of an appellate court of limited jurisdiction. We only deal with workers' comp cases, and there are—I don't know, it varies from time to time, but anywhere from twenty to twenty-five different trial courts around the state where the cases are tried. And then there's an automatic right of appeal, and those all come to this board and the commissioners sitting on three commissioner panels. There's a total of seven commissioners, but randomly divided into three panels that change with every case, and they review the cases and make decisions, and then if someone still isn't happy it goes up to the court of appeal. So Tony—and the seats on the board are all filled by gubernatorial appointees, so because of Herb and Marion, and then Tony Kline and Gray Davis and Joe, and so forth, they were able to get me appointed.

01-00:09:28

Meeker:

And largely these are attorneys who are appointed to the boards?

01-00:09:32

Caplane:

Well, you know, it's interesting—yes, this particular board has seven seats. Two seats are reserved for non-attorneys, and I think when it was originally formed, the thinking was that one would be a labor representative and one would be a management representative, but the law has just gotten so much more nuanced and complicated that the seats tend to all be lawyers now.

01-00:09:58

Meeker:

And this was a paid position, right?

01-00:09:58

Caplane:

Yes, yes. It's a full-time job.

01-00:10:03

Meeker:

Can you actually just go back—can you spell your husband's last name for me, just so we get that on the record?

01-00:10:08

Caplane:

Yes. R-E, M as in Mary, C-H-O [spells]. Remcho.

01-00:10:14

Meeker: Okay, so phonetic. You said you had two kids together.

01-00:10:17

Caplane: We had two children. Yeah, we have a daughter who was born in 1980, and she's now a mother herself, which I guess makes me a grandmother. And our son who was born in 1982.

01-00:10:28

Meeker: Okay.

01-00:10:28

Caplane: And they both live in the area. I'm very fortunate.

01-00:10:32

Meeker: Back in this period, in the seventies, when you were active in the Bay Area, were you active in any activist movements or any public service or anything along those lines after your service in Vista?

01-00:10:51

Caplane: Well, when I went to law school I did a little bit with the farm workers. The farm workers union, forming the union—at that time that was a very hot item. I was involved with the Lawyers Guild. I did some depositions when they were trying to find out the behavior of growers and how they were—whether they were allowing the farm workers, the UFW [United Farm Workers] to organize, and so forth. So that sort of thing. There were grand juries going on. Yeah, I was involved in those protests over grand juries which were kind of—which were really fishing expeditions that were going on.

01-00:11:27

Meeker: Did the feminist movement influence you at all?

01-00:11:32

Caplane: Oh my God! Absolutely! No, absolutely—yeah, absolutely. I was certainly a beneficiary of it. When I went to law school in '72, there were—my law school class was maybe 15 percent women, and we were the cusp of the wave of women going to law school, so it was just fighting those battles day to day. Friends of mine brought a lawsuit against the federal defender's office because they wouldn't hire—it's typical; they didn't want to hire women. I ran head on into people that—because of my first name, Ronnie, people would see the application and think I was a man. There was more than one occasion when someone would sort of look at me and look at my application, look at me—and you could see the synapse gaps closing. One guy actually said to me, he says, "Oh," he says, "you're a woman." I said, "Yes, I am." And he said, "So, do you have any questions you want to ask me?" And that was the interview.

01-00:12:37

Meeker: Wow.

01-00:12:39

Caplane:

So yeah, and I guess most of my women friends were lawyers by that time, because those were the circles. So that was a whole evolution for us.

01-00:12:53

Meeker:

Was it just part of the broader cultural milieu that you were involved in that—like feminism was a thing, and it was influential? In other words, did you kind of have to reach out and engage with other people who identified as feminists?

01-00:13:11

Caplane:

I think it was kind of the circle, the milieu, just the world that we were in. And it's interesting. I think it was sort of different then than it is now. I think if the women's movement has failed in any way, it really is sort of keeping alive—When I started out, a woman could not—I remember a friend of mine wanted to go back—she had married someone and she wanted to go back to using her birth name. And she had to go to court, and one of the questions she was asked is, “Is it okay with your husband if you do this?” And I know that seems ridiculous now, that a judge would ask that, but that was what the climate was. I remember incidents of—really, sexual harassment, and it was just—I remember one woman talking to me about how her supervising attorney kept hitting on her, and she wasn't interested, but it was kind of the—now you would be able to say—you could take action. There would be the HR office, you'd know you were protected, and so forth. But back then, it was a real risk to complain about it, because you risked losing your job, losing your position. And then, the philosophy also was that if that happens, you take the woman out of the picture and you allow the man to continue.

But I think that the one place—and when you look around and you see—my children grew up in a world where they have women doctors and a woman dentist, and women police officers and firefighters and construction workers—and male school teachers. So that what used to be such a clear gender distinction no longer exists for them. But those rights were hard-fought and can easily be eroded. So I think that's where the women's movement has failed to keep that—so they don't take these things for granted. They have to understand that they need to be protected. You've got to be vigilant about it.

01-00:15:26

Meeker:

Well, and another role that would have been new for women at that time would have been CEO of a Fortune 500 company.

01-00:15:31

Caplane:

Oh my God, yes! Yes, absolutely, absolutely. If you take a businesswoman like Marion—and there were very few women businesswomen like Marion, and particularly women who had a family. That's what was hugely—that's one of the things that was so different for her, because I think a lot of women felt they had to sacrifice—the few women, there's not a lot of women doing that then—felt they would have to sacrifice family in order to have that kind of a career.

01-00:16:00

Meeker: So you were living up in Piedmont?

01-00:16:03

Caplane: Eventually, yeah. After we had children, we moved to Piedmont, yes.

01-00:16:07

Meeker: Okay, that was when—early eighties?

01-00:16:10

Caplane: We moved to Piedmont in '88. So we first lived in El Cerrito and then we moved to Oakland, and then we moved—when the stress of applying to private schools went out of control, we moved to Piedmont.

01-00:16:33

Meeker: Did your kids go to Piedmont High?

01-00:16:33

Caplane: Yeah, yeah, yeah. They went all the way through Piedmont.

01-00:16:39

Meeker: Had you heard of Herb and Marion Sandler, being that you lived right in this neighborhood, and this is where World Savings—or Golden West was headquartered? Were they a known quantity to you?

01-00:16:48

Caplane: No, no. I heard of World Savings, and I knew the World Savings—I actually knew, through other sources, World Savings had a great reputation, and that it paid great interest, the interest rates tended to be higher than they paid. But no, I was not aware of Herb and Marion at all. The first time I met them was in Hawaii. I think this was probably about the second year we went. We had gotten into the practice of going to Hawaii every year, leaving on Christmas Day and coming back the first or the second of January. I think it was the second year we were there we were—Herb and Marion and was it—I think Gail Saliterman, who was Tom Laqueur's first wife—were all in Hawaii, staying not at the same place we were, but staying nearby. And there was another family that we were there with, and they were close friends with Gail, and they all knew each other. Herb played tennis, and so did Gail, so they came over to where we were staying, and Herb and my husband Joe, and Bill Turner and Gail, all disappeared to play tennis, leaving Marion with me and Micki and this other woman Sandra. Micki was very, because she had met the Sandlers before, and she was very concerned about the fact we were going to be with Marion. "And Marion is so serious—and it's not going to be relaxed, and she's intimidating," and she's all these various other things. So you can't say that I was exactly at ease when I first met her, because I didn't know what—

01-00:18:33

Meeker: So right before spending time with them—

01-00:18:35

Caplane: Yes.

01-00:18:38

Meeker: You were kind of briefed on who Marion Sandler was?

01-00:18:41

Caplane: Yes, but not—briefed about her—I mean, I didn't have a full picture of her. I knew what Micki perceived as the intimidating factor of Marion, and that she and Herb owned a bank together, but I didn't have the fullness of exactly who they were in the world, just in this little thing. And we carried on a conversation. I think the four of us sat there, and Marion probably participated the least. So there was just chit-chat going on.

01-00:19:18

Meeker: Right, right. What kind of impressions did you draw from that first encounter?

01-00:19:25

Caplane: You know, Marion was such an interesting character. She has an incredible heart, and she can be a very—one of the things that I said to her, and I said after she passed away, was that you know, when Marion was around, I always felt safe. Just having her in my life made me feel safe. And she, somehow—she wasn't warm and fuzzy, but there was something about her that you knew that she was protective. You just knew that you were safe when she was there. And it wasn't—she was not someone who would—she could take people under her wing, but it's not like she was—for instance, this is not about me, but my son Sam. Sam worked for World Savings for a while. I was just talking to him casually. This was after my husband died. He wanted to something in banking. And I just said to them, "Do you know anyone? Sammy's interested in banking. He's going to be living in San Diego. Do you know any connections down there to get him in—?" They said, "Yeah, as a matter of fact, we have a few branches down in San Diego, and we can set him up with an interview." So they set him up with an interview, and they were very clear. They were *not* giving him a job; they were giving him an interview, and he had to do the rest on his own. But that was the way they operate, and they still do, is that they would—it's like the old thing: the best thing you can do is teach a man how to fish. And that's what they would do. They would put someone out there, and they would give you all the tools you needed to succeed—but success was in your hands, so you were the one who was in charge of that.

01-00:21:27

Meeker: Well, then maybe walk me through after this first meeting, how is it that this chance meeting blossomed into a friendship?

01-00:21:34

Caplane: I think they both found Joe very interesting, because Joe represented, he was involved in—he had a very—his law practice was a boutique practice. He worked with some of the legislators, as I said, he represented other groups—

the trial lawyers, the—actually applicants’ attorneys in a lot of First Amendment first impression cases involving initiatives that would be on the ballot. So he did very heady intellectual sorts of things. He did the term limits litigation. He got some propositions knocked off the ballot, so it was that kind of—and very involved with a lot of politicians, and I think they found Joe very interesting, and so we got onto their guest list. And that’s how the friendship evolved.

01-00:22:28

Meeker:

What did it mean to be on their guest list?

01-00:22:36

Caplane:

I love Herb and Marion—they are eccentric people, in their own way, but not—I don’t know how much of this you’ve gotten from other people. But they would have brunches. I’m not sure that I was at any dinners at their houses, but they would have brunches, and they would invite—they were very—they did have a housekeeper that cooked for them. But the brunches—you would never go and say, “Oh, I’m sitting here with a bunch of billionaires.” You never had that feeling from them, because the menu was almost always the same. There was nothing exotic.

01-00:23:09

Meeker:

What was on the menu?

01-00:23:07

Caplane:

Oh, you know—there would be lox, there would be some egg dish that they could make, that they had had their housekeeper make. They always had these cookies that—to me, a cookie should be chocolate chip or something like that. These cookies tended to be—they seemed healthy, like they had fruit in them, or something. And lox and bagels, and things like that. So it was always—but always, yeah. That was sort of their—when they would—in the city—in Lafayette, they would do that kind of a brunch, and it would be out by the pool. In the city, they would do these dim sum brunches, where—has anyone told you about the dim sum brunches?

01-00:23:53

Meeker:

[nodding yes] But go ahead.

01-00:23:54

Caplane:

So that they would have—and they have a friend, Harley Shaiken, who’s also at Cal, teaches at Cal. He’s a vegetarian, so they always took that into consideration and they would have something vegetarian for him. But they would have—the first course would come out and everyone would get one dumpling on their plate, and you’d eat your dumpling. And then you’d wait, and then Marion would ring the bell, and the housekeeper would come out and put one more dumpling on everyone’s plate. [laughter] By the end of the meal you were full, but it was a very controlled—and they had the one conversation rule, that Herb always has—which actually, at the end of the day, it makes a lot of sense, because you’re actually talking, having conversations of

substance rather than just small talk with your neighbor. And Tom Laqueur was *always* getting scolded for breaking the rules. He was always in the dog house, because he would always talk out of turn or carry on a side conversation and get scolded because of it. And the rules were always—Herb was very clear with the rules. He had a list of topics that was often geared toward the guests he had that were there. People were free to bring up their own topics if they wanted.

01-00:25:06

Meeker:

Do you recall some of the topics that were on the agenda?

01-00:25:05

Caplane:

Oh God! This is terrible—not offhand.

01-00:25:14

Meeker:

They were current events kind of things?

01-00:25:16

Caplane:

Current events, and they would be geared toward—there was a guy Mark, who wrote for *The New Yorker*, and he had been in, I guess, the Middle East, so we would be talking about that as a topic.

01-00:25:30

Meeker:

Oh, is that Mark Danner?

01-00:25:31

Caplane:

Mark Danner, yes. Exactly, exactly. So we talked to him. Yeah, sometimes we would be there and there'd be these artists that—so we'd be talking about art subjects. I'm trying to think. I was there once when—I think it was Tom Campbell was there—*there's* a button-down guy. I can't remember what that topic was. But if Joe was there, it would be often political topics, and so forth.

01-00:25:56

Meeker:

So some of the topics might be around Joe's expertise?

01-00:26:00

Caplane:

Yeah, political. Yes.

01-00:26:03

Meeker:

Did you enjoy these? Did you get something out of these brunches?

01-00:26:05

Caplane:

Oh, I loved them! They were wonderful; they were absolutely wonderful. They were absolutely wonderful. You'd be sitting at these—and I think it's because of who Herb and Marion are that they were—there was never any pretense about them. They were always very down to earth. The bottom line is everyone is a little bit like that. They were not—most people don't come from—like Herb and Marion are very successful, but they didn't—Herb comes from the Lower East Side, from a poor family with its issues, and so forth. He went to law school; he did not come out of great wealth. Marion did

not come out of great wealth, although I think there was a—she did go to Wellesley, and so she had probably a little bit of a higher socioeconomic upbringing than Herb did.

But they started—I was just, it's funny—I remember one time being at their house in the city—I guess it was for dinner, and there was someone who was out here. I can't remember who it was. I think he was a guest lecturer at some—he and his wife were out here. Anyway, and I can't remember what his title was, but it was all prestigious people around the table. And they have a powder room, and they had little individual finger-tip towels that you used. And everyone after, several people went into the bathroom—everyone kind of agreed they didn't quite know what to do about those towels, because they were not throw-aways, but they were single-use towels—and what do you do about it? And I think most people sort of took—kind of wiped their hands on their pants to avoid the—the commonality of everything, that it was a very comfortable environment.

But after my husband died, I called up Marion and she—after Joe died—Joe was supposed to be playing tennis with Herb the next morning. And he died in a helicopter accident, and I knew that they had a date to play tennis in the morning, and it was a Sunday morning. So I called Herb—if you've ever been through anything like that, this veil of shock descends, and when you look back you think oh my God—I was trying to be so rational. And I thought I was being so rational—and you realize that you're utterly bizarre. And I called up Herb that evening and I said, "Joe went out flying the helicopter and he's not back yet. I'm sure everything is fine. But just before you go to head over to the club to play tennis tomorrow, just call to check in."

01-00:29:02

Meeker:

Did you know already that he had crashed?

01-00:29:05

Caplane:

No, no. But by every fiber in my body I knew something was very wrong, and I think that part of it is if you continue to pretend everything is okay, it'll be okay. Because once you give into it, you're sunk. And it was past the time he should have been there. He wasn't answering his phone. We had had plans to go to a movie that night. All of those times had passed. But so I'm just being very reassuring, that everything really is okay—we just need to, just make sure you check in with me before you go. And I think Herb—I think he may have offered to come over, and I said, "No, that wasn't necessary. Everything was fine, but just to check in." So of course we found out later that night that he had died, and Herb and Marion showed up the next day at my house, at the house. And I guess I realized afterwards—at some point I looked around and realized there was just Kleenex all over the house, because everyone arrived with a bag of food and a box of Kleenex with them.

Herb and Marion said, “We want to help you with your financial issues.” And I knew nothing about that at all, and they were just—it was amazing, just utterly amazing. They were there—they called me every day, for close to the first year, they checked in with me *every single day*. If Marion went—I don’t know how she found the time to do this, with everything she was doing, because they were still running the bank at the time. She came with me when I met with the lawyer, she was there—she came with me. She just sat with me, and she answered any questions, and she asked questions. She was very—she’s very practical and very precise, so she would ask the questions that I either didn’t know enough to ask or was too timid to ask, or whatever.

Oh, there was something—at some point during that first year, I guess, we had a—I can’t remember what kind of a mortgage. It was going up; the mortgage was going up. And I said to Marion, I called Marion and I said, “You know, I think maybe—should I see about refinancing? What should I do with this to get a fixed rate rather than a variable?” And she said, “Well, let me make an appointment for you to speak to somebody at World Savings.” So she makes an appointment with me, and I go and I’m talking to this person—I suddenly realize I’m not talking with a mortgage broker. I’m talking with the guy who’s in charge of their entire real estate division, that entire division. And he’s advising me about my little mortgage. That’s who they are, and that’s who they expected the people who worked for them to be, what they would—I could have called up Marion and said so-and-so’s—“I’ve got a secretary, and she’s thinking about doing something. Do you mind having lunch with her? Do you mind talking with her?” And they would say—she would talk to her. It wouldn’t be, “I’m too busy, I’m too important to do this.” And they expected the same thing out of people who worked for them. Because there were other occasions when she would make an appointment for me to speak with someone, and it turned out to be the head of the investment unit, or the head of whatever it was, not just—and that’s how they were. That’s what they did—they didn’t expect anyone to do anything that they didn’t do themselves.

01-00:32:33

Meeker:

It’s interesting. I’m thinking of a couple of other interviews that I did, and people talking about the kinds of contributions that Marion made. The way you’re describing it, it’s interesting in that it matches what I’ve heard from these other folks, and that is that she had a clear understanding, I think, of her strengths, her areas of expertise.

01-00:32:57

Caplane:

Yeah.

01-00:33:00

Meeker:

And when called upon, that was where she would make the contribution, through those areas. So the fact that she sat down with an attorney to talk about estate issues, sounds to me very much in line with what these other individuals were talking about.

01-00:33:19

Caplane:

Well, one of her—also, one of her strengths was just being able to—she’s very incisive and really able to ask—when she asked the question you go, oh yeah, that’s kind of an obvious question. But no one would think to ask it. No one would—and she’s just very insightful and incisive that way. Through the [Sandler] Foundation, one of their main strategies is bringing people in to do things, rather than continuing—first of all, they find something that’s a gap and fill it. That’s where ProPublica came from, because there was not original investigation—or only three places that did original journalistic investigation. So they saw that as a void, so they filled it. And then also they’ve done programs at UCSF with—I can’t remember whether it was with asthma or with another one—where they brought in people that have never been working in this area before, but they were maybe in some complementary field. And it made sense to bring someone in who would just bring new ideas and a new approach to it. And that’s how they operated. It’s quite amazing.

01-00:34:37

Meeker:

Being friends with them, was it apparent to you when their interests really started to shift to philanthropic work?

01-00:34:42

Caplane:

Oh yeah. I think they always had a philanthropic bent, and were always doing philanthropic things. But at some point it was very clear that they really were putting—and it was amazing, because when they sold World [Savings], they just walked away from it. They were through with that part of their lives, and they just completely—and I even asked, “How do you feel about—that’s your baby! How do you feel?” And they said, “It’s over now. That was a part of our life then, and now we’re able to sow the benefits of those labors by finding things that need to be done.

01-00:35:24

Meeker:

Did they change, at all, personally?

01-00:35:31

Caplane:

I don’t think so. No, I mean—certainly, what they did shifted, but their personalities were the same throughout. There’s one point that I think, years ago, Joe was talking—obviously years ago. Joe was talking to Herb, and Herb had to return something, and it had to be returned to some place in the Mission. And Herb was complaining to Joe about he’s got to get there, and he’s got to drive all the way down to the Mission, and he’s got to drop this thing off and come back. And Joe says, “Herb, you’re a billionaire. Someone can drive this down for you.” And it never would occur to him that that’s what you can do, that you—

Still, sometimes I’ll go over to Herb’s—well, I’ll go to the place in the city and we’ll watch a movie in the evening. And when Marion was alive—the three of us, the three of us would sit in their bed together. Often I was in the middle, and the three of us would sit in bed watching a movie. And Herb

would bring in dinner to us on a tray, and the three of us would eat in bed and watch a movie. It's comical! It's funny. And they were—Marion designed—she would plan the menus for the week, and she would cut recipes out and have the housekeeper make the recipes. And they saved leftovers, so that—their refrigerator is the neatest refrigerator I've ever seen. They would have little containers—truly, they could have a half a cup of something that was left over, and it would be in its own container labeled. So we would have this smorgasbord of leftovers that Herb would then heat up for us and serve us in bed. And he still does that, if I go over there to watch a movie, we'll sit there, and he'll serve me in bed. It's great!

01-00:37:41

Meeker:

You know, when you had these personal moments with them, did they talk about business? What was the conversation usually about?

01-00:37:50

Caplane:

No, they didn't really talk a lot about business. They may, if I asked them, they would talk about it. But I don't think they really did a lot of—they didn't, because I talked to them some about raising Jim and Susan, who are just fantastic, really fantastic people, and have really carried the values of Herb and Marion forward. And how they managed to do that with who they were, what they were doing, the wealth that they had at their disposal—to be able to raise such grounded children. They said that they just made a decision when they had kids that they were going to cut back on other social activities. Maybe Saturday nights they may go out, but that most nights they would stay home with the children and not bring their work home with them. So I think that was a lot of what they did.

01-00:38:45

Meeker:

Is that how they explained their success in parenting?

01-00:38:48

Caplane:

I think that was a big part of it, and I think the kids always felt—and the children, I think, never felt short-changed by—even when I was thinking about your coming over today, I was thinking about a couple times with the children. I remember when Marion was basically dying, and Jim—I was there and Jim was there, and he's—they went through the—do you have children?

01-00:39:19

Meeker:

I don't have children.

01-00:39:18

Caplane:

Okay. I can't remember. Marion may have said, "I love you." And he said, "I love you more." And she said, "No, I love you more," which is what parents and kids do. And he says, "Well, I think I love you more, but we'll commission a study on that and find out," something like that. Another—just the sweetness and the affection and the—one time Susan, I remember—we were sitting over there. Marion was recuperating from something, and Susan and I were there and Herb was there—and Herb wanted something. He

wanted her to fax something, or to copy something at her house, because she has a fax/copy machine, or whatever. And she was talking about—can't it wait until we get into the office on Monday? Because her machine is old and it's slow and it only does this. And Herb says no, he really wanted it. They're going back and forth, and she's talking about her old machine. And I'm thinking to myself—I would buy a new machine. [laughter] You can buy a fancier machine—but it's just not part of their, you know, that extravagance is not—they're just well-grounded people.

01-00:40:34
Meeker:

You had mentioned Marion's illness. At what point in your friendship did you become aware of her health problems?

01-00:40:42
Caplane:

I think I was aware pretty much throughout, because her skin would be discolored, and in the last several years she was never bedridden, but there was times that she would be recuperating. She had a toe amputated, or she would be in bed, but she never—I knew she had asthma, and asthma is—we talked about this, because there's a stigma to asthma. People, I think that there is a—certainly—this is ten years ago, twelve years ago. There was an attitude that there was a psychosomatic quality to asthma, that it was in your mind. It was a product of stress or was something that you could control, so there was a whole stigma to it. Unless you see someone having an asthma attack, you're really not aware of their asthma. But she never had an I'm a Sick Person jacket. She always soldiered on, and she didn't complain. At the end I think she was getting pretty depressed, and that was hard to hide. But she was pretty positive.

01-00:42:08
Meeker:

Was it apparent to you, approaching the final years of her life, that that's what was happening?

01-00:42:19
Caplane:

You know, the decline was gradual, so I wasn't acutely aware of it. And somehow, when you've got—you just think she'll go on forever. You *just* think she'll go on forever. I remember when Herb called to say that she was dying, it was like—there's got to be a mistake here. That's not the sort of thing Marion would do. She's just not—because you just never saw her as someone who was a sick person. She just kind of soldiered through it all.

01-00:42:58
Meeker:

I'm sorry. [brief pause] You know, I'm thinking about their social commitments, their political commitments, their degree of engagement. Was that something that you talked about much with them? I imagine it would have been apparent at these dim sum dinners, but were you shocked when they start CAP [Center for American Progress] or ProPublica or something like that? Was that something new and unique?

01-00:43:34

Caplane:

I was not shocked. No, I was not shocked when they did it. I remember them talking about starting CAP, about how the Republicans had this Federalist Society, and telling me how they had come to this idea to start CAP. No, it wasn't surprising. There was certainly an awesome quality to it, because they figured out—with ProPublica, that they figured out what this gap was, and they got the best people available and came up with a model that was very successful. And they won several Pulitzers and other awards that have verified that.

01-00:44:23

Meeker:

Well, when they start these, CAP and ProPublica, and then everything else they're involved with at the foundation, they're not young anymore. And they're not—like young people are your typical entrepreneurs, right? And these were entrepreneurial pursuits. I guess, was it just part of their imagination that they have the idea, so they do it?

01-00:44:56

Caplane:

Pretty much. I really think pretty much. But they do their due diligence. They really do a lot of investigation and a lot of research before they—I was thinking about something that—I can't remember. There was some proposition on the ballot that someone wanted them to contribute to. They do not respond to grant requests. They don't take grant requests. They come up with their own ideas, and they're the ones who will call you and say, "We want to support what you are doing." You don't ask them. Even when friends would come to them and say, "Would you give \$10,000?" or whatever, to this thing—they asked very, just because I would say this is something I believe in, that was not good enough. They wanted to know—they were always supportive of their friends, but they wanted to know, they would ask the—and Marion really had a way of just closing in on what the vulnerable issues were. And you had to be really prepared to answer those. And I think that that was also the way that they, before they set up ProPublica or CAP, that they really did a lot of groundwork and figured out exactly—and then of course, with ProPublica, got top people to staff it. And the courage to stand back and say—we're not exerting any editorial control at all. We don't have a voice. You work on what you work on. You don't tell us what it is. And then you make it available to the public. You put it out there, and anyone can take the work and reprint it. It's remarkable!

01-00:46:32

Meeker:

In the more casual gatherings with them or intimate meals, were these things on the table? Were they being talked about in terms of this is the ProPublica idea, and these are the challenges we're facing?

01-00:46:48

Caplane:

They would talk about them some, but we would not have deep discussion about what they were working on. No, we wouldn't. I know particularly with ProPublica, the rape in the military thing, when they were working hand in

hand with the *New York Times* reporters, I know that that was a big deal—not only because of the story, but because of the process. Herb was very proud of that.

01-00:47:18

Meeker:

As a friend who wasn't directly involved in this kind of work, did they come to you and use you as a sounding board? Is that something that was happening?

01-00:47:28

Caplane:

I wish I could say yes, they did—and that I was really the source a lot of their ideas, but that would not be true!

01-00:47:34

Meeker:

[laughing] Okay.

01-00:47:35

Caplane:

That would not be—an interesting thing, no, not in terms of that. It was very interesting. You know, Marion's brother Barney, they were very, very close, and otherwise very different. Barney has his name—Osher is on everything. The only thing I think the Sandlers ever put their name on was the building down in Mission Bay, and Marion said to me that—and they just were not—they just did not look for that kind of attention or that kind of publicity. They didn't want it. And Marion said the reason they did that—she told me at the time—she said that was for their grandchildren, because they wanted to make sure the grandchildren had some—there was something that they could point to that they had done. But they were not—none of that. Just none of that. Herb always picks up the check. I don't know many billionaires—in fact only the Sandlers—but the story is they never pick up the check. Herb always picks up the check. He's the best date! He's the best date.

01-00:48:53

Meeker:

When was the last time you saw Marion?

01-00:48:56

Caplane:

I saw her the day she died. I was over there in the evening, and she died right after I walked [out]—I left, and actually as I was leaving, I saw her—we had all been there. Steve and Susan had been there. I don't know where Jim and Gretchen had been, but Steve and Susan had been there, and they went out to get something to eat, or whatever, and I was there with Herb and Marion. And I don't know whether she was in a coma or whatever, but she was not conscious. And I left, and as I was pulling out I saw Steve and Susan coming back in very hurriedly, and I think what happened is Herb had—she must have died in that interim, and they called and they just came shooting right back up.

01-00:50:01

Meeker:

Do you recall the last real conversation you had with her?

01-00:50:03

Caplane:

I think the last—from my recollection, the conversations were just being able to express how I felt about her, to be able to—because she wasn't the sort of person you'd say, "Marion, I love you." But at that time, to be able to say I love you, and I can't imagine living in a world without you, and how much I've learned from you. Just—she really was—she really, it truly is teaching by example, the way she lived her life. And she just had—she gave people the tools they needed to—her secretaries! She would take these people who, by anyone else's evaluation they had very little potential, but she would take them and she would give them—if you were working for her and you did not succeed, it was your fault. She did everything—she gave you everything you needed to succeed. Those were the last conversations.

01-00:51:18

Meeker:

How did you engage with Herb after her passing?

01-00:51:23

Caplane:

Well, we share the bond of both being widowed/widower, and it just kind of continued. First of all, Herb and Marion included me, after Joe died, in a *lot* of things. If they were going to a fundraiser, if they were going to an event, I always got to go with them. I've met Robert Redford, I've met Sean Penn, Michael Keaton, that I got to go to with them. I guess—Herb is not an easy one to take care of. He really does not—he's not easy about that, but—

01-00:52:24

Meeker:

Meaning that he doesn't like to be taken care of.

01-00:52:26

Caplane:

Yeah, yeah. It's like—I'll make you soup, I'll do this, I'll do that—whatever, and he just—"What are you doing for New Year's Eve? Do you want to—?" It's like, "No, I'm fine for New Year's. I don't need to." "Well, I'm not, I would like to—." But the friendship has just continued. Clearly, my main friendship had been with Marion, before she passed away. They were both friends, but I was much closer to Marion. And we've just sort of continued. I don't think I'm a sounding board for business. He'll bring me up to date on what's happening. He knows that I've been a complete vulture when it comes to this Theranos stuff. You know, Theranos is that drop of blood—Elizabeth Holmes—I feel like a vulture, but she's the one who—she raised billions of dollars.

01-00:53:19

Meeker:

Oh, right.

01-00:53:19

Caplane:

And had Kissinger, George Schultz, and I don't know who else on—other impressive people on her board. And I remember talking to—and it seemed like such a good idea. And I remember Herb saying—I can't remember who was over for dinner. It was Herb, and me, and someone else was at his house—I don't remember who it is, and he was saying— You know, it's just

the wisdom, because it seemed like such a good idea, and everyone was jumping on the bandwagon, trying to—putting money into it, and so forth. And he's the one who said they're crazy. These people don't know anything about science. She's got a very impressive board—but so what. They're not scientists. Anyway, he said this company is not—there's no there there. And of course he was prescient, because within the next couple years the whole thing just started to spiral down. Anyway, but he would keep me posted on that sort of stuff. But when we're together, we just chat about people, we chat about—they both like gossip! Marion *loved* gossip.

01-00:54:26

Meeker:

[laughing] Okay.

01-00:54:27

Caplane:

So we would gossip about people. I remember when Herb had bypass surgery at the Cleveland Clinic, and actually, my sister works at the Cleveland Clinic. So when they went out there for the surgery, I put my sister on and said just make sure you take care of them, and so forth. So Caryl hung out with, I guess, Marion and the kids a lot. And when Herb was recuperating at home, Marion was there around the clock with him, and so I would go over to keep her company, and we would just gossip. But I remember her sitting there—I don't know whether she was darning something or hand-sewing a hem, or whatever it was—which was just so incongruous, but that's—

01-00:55:15

Meeker:

Well, you know, the knitting is something that always comes up in these interviews.

01-00:55:17

Caplane:

Yeah, yes.

01-00:55:19

Meeker:

And for a time I was thinking that it was almost a performative thing, that she would go into these meetings and knit, and largely the men who she was interviewing wouldn't know what to do with themselves. But as it turns out, this was something that she actually did and loved, and Herb still wears her sweaters that she knitted for him.

01-00:55:40

Caplane:

Oh yes, I've got some of her sweaters here. After she passed away, Herb let me go through her stuff, and I have several of her sweaters here.

01-00:55:44

Meeker:

Oh, that's sweet.

01-00:55:46

Caplane:

Yeah, it's wonderful. And she really kind of gave me the fortitude to do it myself. She said, "Any meeting I am not chairing, I knit during the meeting." And I think she has been—and I'm *sure* she took a lot of guff for that, because I know that I sort of said okay, fine—I'm going to do that too. So if I go to

meetings or seminars, whatever, before I retired, I would be knitting. And I did hear through the grapevine a couple times, people would say, “You know, she was knitting! Did you—?” But we’ve all been vindicated, because I think there are studies that show—I think that that fidget toy that they have now is something—it shows that it helps you, if you’re doing something like that with your hands, that is fairly mindless, it helps your mind focus on the task at hand, so your mind isn’t wandering, and so forth. So knitting is the same thing as that. If you knit, it helps you stay focused on things.

01-00:56:38

Meeker: So it sounds like she actually had a philosophy of knitting. [laughing]

01-00:56:42

Caplane: Oh yeah, no absolutely! It was her zen space, or whatever, but she would—yeah.

01-00:56:47

Meeker: Oh, interesting. So you guys would talk about this?

01-00:56:51

Caplane: Knitting?

01-00:56:51

Meeker: Yeah.

01-00:56:52

Caplane: Well, I knew that she was known for knitting, and I know that she—she always had a knitting project with her, at their offices, at the World Savings offices, she had her knitting bags there, so that she could knit during a meeting and we did talk about it. Everyone talks about her knitting.

01-00:57:13

Meeker: Well, you know, I know nothing about knitting, I’ll admit. [Caplane laughs] But I would suspect that there is a whole language about knitting, that there’s different techniques, that there’s different levels of expertise that you can be engaged in. Did the two of you engage in that kind of conversation?

01-00:57:34

Caplane: No, because I think she knitted more than I did, but I think we were both experienced knitters, so we didn’t talk. You’ve got to have the right pattern. You can’t be following an intricate pattern while you’re sitting in a meeting. You have to have your simple—so you have a couple of projects going at once. You have something that maybe you’re doing at home, that you can focus more on the project. And it’s the balance of what’s going on out there versus a thing, and when you’re home you can put more on the project. When you’re at a meeting, you’ve got to have a fairly simple project. We discussed that, but we didn’t discuss about—well, she told me where she bought her yarn, and so forth, and she connected me to the Website where she orders her yarn, because I asked her about that sort of stuff.

01-00:58:23

Meeker:

Were there any particular projects that she was proud of in terms of knitting?

01-00:58:33

Caplane:

You know, she would knit projects for—if they had a World Savings—if they had a raffle or something like that at World Savings, she would knit something, always do something for that, which people really appreciated. No, she did do those multi-color sweaters for Herb that are very intricate, and a lot of finishing work required on those. Yeah, I did talk about—I was doing some sweater, a kid's sweater that required a zipper to put into it, being put in, and I asked her about—I think I told her that I had taken it to a dressmaker to sew the zipper in for me, which was maybe a \$25 project, to have a dressmaker do it. I talked to her about it, and she said, well, you just—she would have done it herself. She wouldn't have paid a dressmaker to do it, but you just do it yourself, and so forth.

01-00:59:30

Meeker:

Interesting.

01-00:59:30

Caplane:

Yeah.

01-00:59:31

Meeker:

Did she have other girlfriends?

01-00:59:35

Caplane:

You know what, I don't think she had a lot of girlfriends. She and Herb really were a dyad. They were pretty much in lock-step. He took her to the beauty shop. He drove her to the beauty shop. At some point I think she told me that she drove, but I've never seen her drive a car. She never—they were pretty much—it's amazing. It really is amazing that they worked together, they lived together, they had children together, they had meals together. They had very—there's very little that they did separately. And they got along! They were a very successful team. It's very unusual.

01-01:00:23

Meeker:

Were there ever any challenging moments that they shared with you, maybe when they were ridiculed on *Saturday Night Live*?

01-01:00:31

Caplane:

Well, that was awful, that was awful—that was absolutely awful. I think one of my regrets is that—I did write a letter to Lorne Michaels saying that he should be ashamed of himself, and I just wish I had made that letter even stronger than I had. But oh no, that was devastating for them. Talk about no good deed goes unpunished—that was really devastating for them.

01-01:00:57

Meeker:

How did they respond?

01-01:01:02

Caplane:

Well, they were very upset about it. I think they considered suing. I don't think they did. I think they considered it. I think Herb made the mistake of talking to the press at some point, because the press is just not going to be kind in that thing. The *New York Times* article had a lot of misinformation in it, some of which was eventually corrected. But having to—it was awful, it was awful. It was awful—you just want to say this is—I know fair is, no one is—that's a standard that no one feels necessary to abide by. But it really was not—the accusations were completely off base, and it was like this housing crisis, the real estate crisis happened, and they had to find someone to blame it on—and they became good targets. But they did not do anything wrong. And in fact, if anything—they were very careful in the whole sale. I didn't find out—at that time I was talking to them regularly and seeing them, and I didn't find out about the sale till I read about it in the newspaper. They were very close-mouthed about it. The utmost integrity, and they were the ones that survived the savings and loan crisis the first time it happened, because they were not doing subprime lending, so they were—and that they would get attacked for this was just appalling. It was terrible; it was terrible.

01-01:02:41

Meeker:

You said that you were active in your temple up in Piedmont.

01-01:02:45

Caplane:

Well, the temple is actually in Oakland, but yeah.

01-01:02:49

Meeker:

Oh, it's Oakland. Which one was it?

01-01:02:50

Caplane:

[Temple] Sinai.

01-01:02:54

Meeker:

Okay. Was that a point of camaraderie for the two of you? I know that their family wasn't really observant.

01-01:02:58

Caplane:

No, they were not observant. Herb had no interest in seeing Israel at all. In fact, if anything, he was aggressively opposed to ever going to Israel. They were—I'm trying to think if they've ever—Herb, I think, has had Passover, has come to my house for a Seder. They do—it's interesting, they do—last year they did a late Passover, they did a late Seder—well, after Passover was over, because of Susan's illness. But they did do a Seder, and they do—they do that kind of a celebration. But no, it's not—they're not—to me, they clearly embody Jewish values: the repairing the world, the generosity, the giving, how they treat other people, how they are and who they are in the world. It clearly embodies—and they're both—Herb is very Jewish in a cultural way. They're both Jewish culturally, but—no, there was not that—they didn't challenge me because this is what I chose to, where I put so much effort, and so forth.

- 01-01:04:16
Meeker: Were Herb and Marion on the same page about that in terms of observance?
- 01-01:04:23
Caplane: Yes. Certainly, the way I knew them, yes, they were. Who knows where they were, if that's where they both started out or they came together on that, but—
- 01-01:04:33
Meeker: Well, I think Jim was bar mitzvahed, right? If I remember correctly.
- 01-01:04:39
Caplane: I don't know. I don't know.
- 01-01:04:43
Meeker: When you celebrated Passover with them, and they were hosting, did it feel like a solemn, important occasion? Was that part of it?
- 01-01:04:55
Caplane: You know, at Passover—have you been to a Seder?
- 01-01:04:59
Meeker: Yeah.
- 01-01:05:00
Caplane: Seders are not solemn occasions. They're not solemn occasions.
- 01-01:05:04
Meeker: Yeah, the wine. [laughing]
- 01-01:05:06
Caplane: They're patterned after Greek orgies, where you eat too much and you drink too much—and actually, it was a lovely Seder, because Susan and her niece—oh my God, and I'm blanking on her name—Leah, together they put together the sermons, and they got some music, they had some music that they had streamed for the thing, the story they had streamed. So it was a very—but it was not your traditional, it wasn't a traditional Haggadah or traditional service that they were doing, but it had all of the elements. And it was very meaningful, because they had written it themselves.
- 01-01:05:50
Meeker: Right.
- 01-01:05:49
Caplane: So yes.
- 01-01:05:52
Meeker: So it is something that was taken seriously, it sound like.
- 01-01:05:53
Caplane: Oh yes, yes, yes. Absolutely, absolutely. No, they were not making fun of the holiday, they were—absolutely, yes.

01-01:06:03

Meeker:

Is there anything that you'd like to add? Is there anything I haven't asked about that you think is important to remember?

01-01:06:13

Caplane:

Let me see. You know Marion, I remember one time when I was having dinner over there. Marion was sure she was going to be able to find a new husband for me, and so that was—so she'd introduced me to several people. But at some point, I remember being over there for dinner one time, and Marion turned to me and she said, "You know, Ronnie, you've put on weight—and it doesn't look good." [laughter] That's what she would—and you know it was said out of love. But it also meant that I'd put on weight, and I wasn't looking good.

Other things that she did—she was so quick and you could—I was at their house one time for brunch, and there was a well-known writer there. And we were talking, and I made some comment about—he asked me, there was just the three of us, Marion, this other guy, and I—someone asked me, and I said, "Well, hopefully blah, blah, blah will happen." A few minutes later he says, "You know, it always bothers me—I remember interviewing Shirley Temple Black one time, and she said, 'Hopefully such and such will happen.' And it always bothers me when people misuse that word *hopefully*." And I think he's talking about me. And I'm trying to figure out what—and so, he says, "Hopefully is a state of mind, not what you want to see happen." And so Marion came back and she said, "Well, if you think it's being misused, if it's really being misused that much, don't you think it's probably fallen into the common lexicon—and it's correct?" She was defending me. They fixed me up with one guy, and with another guy some time, and it didn't work out. And he said, "You know, Marion, Ronnie really just—she just needs someone to take care of her, and I'm just not that person." And she said, "Really? Well, I fixed you up with her because I thought *you* were the one that needed to be taken care of, not her."

And they're very fiercely loyal. There was a woman who had, when you have that kind of a loss, you really—you just want to have someone to talk to who has been through it, and so forth. And I think this other woman—her husband had died in a plane accident, and they had sort of taken care of her for a while. And they asked her if she would—how did this go—if she would talk to me, just a connection, whatever. So she called me up, I guess. They told me this was going to happen, did I want them—? I said absolutely. And so she called me up, and it was a very—sort of a short conversation, but a very—it was all about her. She wasn't extending—it really is, it doesn't sound like a big deal. Because I know I've been at the other end of that, where I have extended myself to people who are going through similar losses, and you just—I'll bring dinner over to you. Let's talk. These are my—whatever—and she was very—and I told them. I wasn't badmouthing her. They asked if she called, and I said, "Yeah, she called. It was a short conversation." They were just

through with this woman. They were just absolutely—she had, that was like there was—she had, and it's the same thing. That they expect other people to do—they don't expect anyone to do anything more than they would do themselves. And they expected someone to extend themselves, and she hadn't—and that was the end of her. But it was out of loyalty to *me* that they did that. So when you are their friend, you fell within that protection. So no *wonder* I felt so safe with Marion on my team.

01-01:10:26

Meeker:

Well, it's a certain kind of standard to uphold, right?

01-01:10:29

Caplane:

Yeah, yeah.

01-01:10:31

Meeker:

I've heard that as well, what you just described, that their standards mean if there's friendship, maintaining the friendship and extending it to others as well.

01-01:10:46

Caplane:

Yeah, and it's the same thing as setting me up with the real estate division. They would do that for anybody. That was one of the beauties I thought of, who they were and what they brought, their philosophy, the way it funneled down through the company, was that they expected people to extend themselves to others. I think people learned by that. She was great. I miss her a lot. I think about her a lot—and what would Marion do in this situation? Or, what questions would she be asking? I wish she was here to talk this over with, because she would always have—anyway, I just miss her a lot. And there were times—you could see the friction with Herb and Marion occasionally. Not very often. Herb might get upset about something, and Marion would just ride it out until he was done.

01-01:11:45

Meeker:

Well, it's in many ways a difficult task to try to capture memories secondhand of individuals. To be able to actually have sat down with her and ask her questions would have been, I think, a really interesting and challenging thing to do.

01-01:12:07

Caplane:

Yeah. I'm sure Herb told you this. Her father passed away when she was, I think, a junior or a senior at Wellesley. And I'm sure that the expectation was that she would—my impression is that her mother was a very domineering, strong figure. And I talked to her about this once. When she did not go back to Biddeford, Maine to live with her mother, but stayed in New York with Herb this was—that took a lot of courage. Her brother couldn't do it. Her brother ended up staying in Maine until—and marrying a woman he loved, waited until after the mother died. Marion was the youngest. She was the only girl in the family, and I think that was a pretty courageous thing for her to do.

01-01:12:56

Meeker:

Did she ever tell stories about those early years? About being on Wall Street and being one of the only women there, for instance?

01-01:13:05

Caplane:

She talked a little—not a lot of stories, no. When you're the first woman, the only woman doing it, you're less of a threat than when the numbers start multiplying. A lot of times it's easier for number one to do it—but it's when number six, seven, eight, nine, and ten started invading, that's when the hackles get up and the wall comes down. But she talked about—she started out as a buyer at Bloomingdale's. That was her first job. She was great on the retail front.

01-01:13:47

Meeker:

Did you go shopping with her?

01-01:13:48

Caplane:

We went shopping a couple times, and she could comment on how the store was laid out, and where they'd made the mistake, and where this clerk wasn't being responsive enough, and so forth. Oh yeah, yeah.

01-01:14:00

Meeker:

She had the reputation of being a great shopper.

01-01:14:02

Caplane:

Oh yes, I think she was a great shopper. I think she was a very efficient shopper, a very focused shopper. She was not a browser; she was a shopper. There's a difference there.

01-01:14:11

Meeker:

[laughing] Well, not to end on such a light note, but is there anything else that you would like to add?

01-01:14:17

Caplane:

I don't think so. I made a few notes, but I think I got it all. I think I covered—[reading notes]. Now, I'm sure someone told you about how she and Barney used to love to—Barney would come over with leftover lobster parts, and they would—she loved to eat lobster. Lobster was one of her favorite things, and she would get down and dirty with it. She really liked sucking the meat out of the tentacles and the other things—really getting dirty!

You know, it just is—it's just interesting how people, after the way that Herb and Marion stepped up after my husband died was just so far beyond anything you ever would have expected from anybody. I would sit back and say I don't think I could ever be this good. They were so—watching not only the financial things, but being truly instrumental in prodding Tony to—and calling every day. That really is a measure of who they are, the way—their loyalty and devotion and just steadfastness. Anyway, I think that's everything.

01-01:15:40

Meeker:

Great. Well, thank you very much for your time. I really appreciate it.

01-01:15:43

Caplane:

Sure, thank you. I hope this was—

01-01:15:44

Meeker:

This was great!

[End of Interview]

Interview Addendum

By Ronnie Caplane

It was nice to re-read the interview. It brought back a lot of memories. Marion was such a remarkable woman.

When they were raising their children, I mentioned that they cut back on social activities. Even though they worked together, they left business at the office and gave all of their attention to their children. Susan and Jim learned how to be in the world by Herb and Marion's example. Of course, they learned a lot about philanthropic pursuits and how to value programs. That's why Jim and Susan are so successful in what they do.

During the interview you asked if they discussed business and or there's philanthropic plans with me, which they did not. Discussions around their dinner table with guests were always very interesting but they were not about what the Sandler and family foundation was doing.

You can't talk about Marion without also talking about Herb. They were very much of a team. Marion could not have accomplished all that she did without Herb.

At the time they got married, working wives were rare. They certainly were not Wall Street analysts. They were school teachers, store clerks or nurses. Herb not only supported Marion and what she was doing but he reveled in her success.

Herb loves to tell a story about how he asked Marion a financial question. Rather than explaining it to him, she told him not to worry his pretty little head about it that she would take care of it.

There was no jealousy and no competition between them. They truly were equals. That is so unusual for a married couple who are in the same business.

I think there was a perception that Herb was the soft touch and that Marion was hard edged. They both could be very warm and loving and they both could be very hard-nosed.

After Marion died, I did not know how Herb was going to go on. I was afraid that he would follow her to the grave. Herb does not show emotions but I do know that his grief is an abyss. He misses Marion every day, all day.

Marriages are like their own little ecosystem. When one of the parties is removed, the other's behavior can go out of whack because that other person is no longer there to temperate it. A lot of people saw Herb & Marion as the same person. But they weren't. Each had their own style, skills and abilities, which blended beautifully.

After Marion's death, Herb found his inner Marion, incorporate her talents and carried on. I'm sure he still talks to her daily.

Herb is a remarkable man in his own right as well as the other half of the Herb & Marion team. I kill myself very lucky to have Herb as a friend. He is the best date ever and I enjoy spending time with him. I also get to see his silly side.

Have you seen Marion's headstone? It lists many of her accomplishments. There's a space for Herb next to it. I told him that his will say "I'm with her" with an arrow pointing to her.