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Passing the Buck: The emergence of the West Marin Fund

By Herb Kutchins

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*This is the second in a series of columns discussing the West Marin Fund, a community foundation formed in 2010 to address the significant and unmet needs of coastal Marin communities and the nonprofits that serve them. The first, by Ann Boren, introduced the fund; this, by correspondent Herb Kutchins, puts the fund into context.*

 “For the poor will never cease to be in the land; therefore I command you, saying, ‘You shall freely open your hand to your brother, to your needy and poor in your land.” Deuteronomy 15:11

When Beryl Buck, a wealthy and reclusive Marin County widow, died almost 50 years ago, she left the bulk of her estate to her foundation. To everyone’s surprise, before long the Buck Trust was worth $1 billion. It has dominated philanthropic activity in the county ever since.

The trust was set up so that it would be used exclusively for nonprofit charitable, religious or educational purposes in providing care for the needy in Marin, “and for other non-profit charitable, religious or educational purposes in that county.” Buck also stipulated that the income be spent in the year after it was earned. Ultimately, the Marin Community Foundation became responsible for distributing funds.

At the time the trust was established, the nonprofit sector was relatively small in the county, particularly in the unincorporated area of West Marin. Since then a significant expansion in the sector has occurred (concurrent with growing opposition in the country to government-funded social programs). In California, a series of tax-cutting measures has reinforced this trend. West Marin, as a result, has become dependent on nonprofits for many of its programs, and for years the Buck Trust was a primary source of funding for their growing number of needed programs (as well as some that might have been unnecessary.)

The Marin Community Foundation was therefore an important part of the county’s de facto governing infrastructure, particularly in the villages and ranchland of West Marin. In the past, many local organizations, such as the Dance Palace Community and Cultural Center and the Marin Agricultural Land Trust, relied heavily on grants funded by the trust.

In 2009, the foundation adopted a strategic plan focused on three critical areas: improving the academic performance of low-income students and students of color; increasing the availability of affordable housing; and ending the cycle of poverty experienced by poor and low-income individuals and families. Its directors hope to achieve these goals through grants, and also through research, education, advocacy efforts and collaboration. By concentrating on these areas, the foundation is attempting to follow Buck’s directive to provide for the needy. As a consequence, funding for some West Marin agencies has been reduced; in other cases, money has been shifted to new and different activities.

In order to address these challenges, a group of local community leaders joined together to form the West Marin Fund, with an initial goal of raising $1 million to provide operating support for coastal Marin agencies and startup funds for new initiatives. It started as the brainchild of retired banker Dick Lemon and bookstore owner Steve Costa. And although the fund could be seen as a critique of the Marin Community Foundation’s change in policy, one of the first things the founders did was consult Tom Peters, the foundation’s executive director. According to Costa, Peters welcomed the effort, and expressed interest in finding ways to partner on some projects.

The West Marin Fund could have chosen to become one of the Marin Community Foundation’s donor-advised funds, but its directors decided to remain independent. Still, they rely on the larger organization to invest assets and provide related financial services. Ironically, the fund has been able to interest the foundation’s staffers in its activities and as a result may improve the foundation’s participation in some neglected programs.

The fund is an ambitious undertaking. Careful to avoid shifting existing contributions away from nonprofits, it is trying to solicit contributions of at least $1,000, which are larger donations than those usually given to individual nonprofits. All of the members of the fund’s board are unusually talented and experienced. In total, they have over 300 years of experience as staff or board members of nonprofits. Its executive director, Catherine Porter, also has extensive experience with nonprofits.

Although it has not yet reached its initial fundraising goal, the fund decided to issue grants from donations it has already received. Two rounds of awards totaling about $100,000 were made last year, and a third round constituting $50,000 is underway. Costa said the fund hopes to turn a substantial portion of the money it raises into grants, far more than the five percent of earnings usually disbursed by foundations.

Ongoing operational support of existing agencies is one of the fund’s priorities, but the group is not yet in a position to do that on a consistent basis. Instead, its first round of grants, ranging from $600 to $4,000, went to 27 West Marin agencies for projects designed to increase their fundraising capabilities. The next grant offering will ask agencies to identify and apply for what they need most.

The fund has also offered a series of meetings called confabs, which are informational but also designed to bring together nonprofit leaders to share their experiences and wisdom. Some gatherings discussed how to use information technology, techniques to improve outreach and fundraising capacity on Facebook, and improving board members’ effectiveness. At the most recent meeting, attorney Tom Silk spoke about the legal issues nonprofits face and distributed a one-of-a-kind manual, “Non-Profit Law 101,” that has been posted on the fund’s website.

An overarching goal is to create a sense of unity among the 11 coastal villages, and each of these confabs concluded with informal gatherings at which nonprofit participants got to know each other. This in itself has been a valuable way for agencies along the coast to talk with each other, and in many cases to discuss similar experiences, challenges and solutions.

Recognizing the shifts in population caused by rising property values, the West Marin Fund hopes to target the increasing number of wealthy second homeowners for substantial contributions. As Costa points out, there are five billionaires in Bolinas alone. Second homeowners may give generously where their principle residence is located, but may not fully understand the role nonprofits play in providing the underpinnings of support for these coastal communities.

There are many other aspects of the housing crisis related to the increase in housing costs and second homes, both of which create difficulties for young families and service workers. There is also an ongoing need to improve and increase farmworker housing. Recognizing the centrality of housing problems to the preservation of the fabric of life in West Marin, the fund has decided to formulate a “white paper” to look at this subject in depth. It will be the first of what Costa hopes will be a number of reports that will help focus the group’s work.

What will the impacts of the West Marin Fund be on the problems of West Marin’s needy? Many of the programs it has chosen to fund do offer assistance to those in need, but the fund has a broader goal to support organizations with mandates to serve a wider population. Perhaps it is too early to tell how much the fledging organization will be able to do for the underserved of West Marin, but its forthcoming white paper on housing offers a promising start.

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