



Connecting people who care to causes that matter for a just and thriving West Marin

# DONOR REPORT FY 17-18

JULY 2017-JUNE 2018

## Summary

FY 17-18 was an exciting year for West Marin Fund, thanks to the great generosity of so many people who gave their time, experience and financial support. This generosity helped catalyze a sequence of actions that significantly strengthened West Marin Fund as a community foundation: we nearly doubled our revenues over the previous year, articulated our commitment to equity and inclusion, rapidly expanded our grantmaking, developed our program strategies and regional partnerships for greater impact, improved our organizational policies and infrastructure, and engaged more members of the community in our activities. We greatly appreciate the critical contribution that our donors provide to West Marin Fund, as we seek to inspire giving and mobilize resources that enhance the long-term wellbeing and quality of life for people who live, work and visit in West Marin.

## Our Grantmaking

The commitment of many of our donors to social justice encouraged us to carry out a review of our mission, values and goals. We adopted a new mission and set of values (see [www.westmarinfund.org/about](http://www.westmarinfund.org/about)) and introduced the concept of equity as a core concept of our work. We developed five main areas of grantmaking:

- Advancing educational opportunities for all
- Promoting community equity and inclusion
- Supporting community vitality and wellbeing
- Strengthening community arts and culture
- Encouraging land, water and wildlife stewardship

Thanks to you, our generous donors and to several donor-advised funds now housed at West Marin Fund, we awarded a total of \$562,664 in 105 grants. Of this, \$417,913 went to local nonprofits to enhance the long-term wellbeing and quality of life for all in the unincorporated communities of coastal West Marin.

With dedicated donor funding, we also developed and implemented a grantmaking initiative to support women and girls' empowerment in West Marin, in combination with an inter-personal violence prevention program for families and children.

We worked closely with an individual donor to arrange for the transfer, and then sale of a real estate asset resulting in a \$1.1 million contribution to establish The Madrone Fund of West Marin Fund. The purpose of the contribution is to support the success of West Marin youth from cradle through local schools to career, and the strategic plan of the Point Reyes National Seashore Association.

In addition to grantmaking, West Marin Fund continued to build the capacity and skills of nonprofits serving West Marin. Our Spring workshop focused on fiscal sponsorship, financial transparency and fundraising; it was attended by 43 people, more than a third of whom were board members. The Fund also organized 4 meetings of local executive directors, to increase knowledge on effective board-staff relations, staff recruitment, and nonprofit collaboration.

*"A big thank-you for last week's workshop! The workshop very much helped to demystify fiscal sponsorship and financial transparency - and the humor around fundraising is wonderfully stress-relieving!"*

- DEBBIE DALY, SOUND ORCHARD, POINT REYES STATION (APRIL 2018)

West Marin Fund also launched a significant new initiative to bring key organizations together to identify how best to develop an integrated regional vision for West Marin for the next 10-20 years, with a focus on equity. 'Visioning Next West Marin' will help map what planning activities and resources are already in hand, where there are gaps or duplication, and what it would take to develop and apply a shared vision. We have had conversations with, and received enthusiastic support from representatives of the County of Marin, the National Park Service, West Marin Community Services, West Marin Collaborative, Marin Community Foundation and San Francisco Foundation, among others.

## Our Growth

FY 17-18 was a year of rapid growth and change for West Marin Fund. In addition to the significant increase in revenues and grants, we elected three new board members and five community advisors, established two new donor advised funds and an endowment fund, developed a socially responsible investment policy, introduced new organizational branding, and improved our systems to handle the significant increase in contributions and grants awarded. Board and staff have collaborated closely to agree on and then implement organizational priorities and goals, and to reach out to the community for help and advice. To avoid 'reinventing the wheel', we also have made a point to draw on the knowledge and experience of other community foundations, including Marin, Richmond, Napa Valley, and Petaluma. We have been fortunate to expand our team in FY 17-18 with the appointment of Kim Klein as development consultant and Wendy Friefeld as volunteer liaison for the advisory council.

## Community Input

As a community foundation, West Marin Fund recognizes the importance of having effective evaluation processes and incorporating feedback, while also understanding the challenges of doing so in a rural area with low population density, isolated communities, and a large number of nonprofits with distinct activities and varying levels of capacity. From January-June 2018, we concentrated our efforts on seeking feedback and guidance from community members on our strategic direction and program implementation. In particular, we carried out:

- a. An online survey sent to 100 people (nonprofit leaders, community members, donors, advisory council members, business owners, etc) to evaluate our grantmaking effectiveness, our funding priorities, and thematic issue areas. We had a well-above industry standard response rate of 48% and shared an analysis of the results with all those who had been invited to participate as well as other members of the community. There was very strong interest in West Marin Fund supporting children, youth and families. There was also strong interest in rural transportation, equity and inclusion, and affordable housing. These findings have informed our development of thematic areas focusing on pre-school scholarships for low income families; apprenticeship opportunities for under-served youth; and support for women and girls' empowerment.
- b. An online survey for 45 representatives of local nonprofits to identify their organizational priorities and training needs. Their responses will inform West Marin Fund's development of its skills building workshops, which we are now in the process of planning for the next 18 months.

West Marin Fund has also developed a video series, 'Stories of Changes' to tell the stories of people impacted by the nonprofits that West Marin Fund supports with community grants. The series includes a student attending Commonweal's Power of Hope summer camp; a Latina participating in the Abrienda Caminos and Latino Photography Projects; and a young woman with cerebral palsy who benefits from riding regularly at Halleck Creek Ranch. These videos are used by West Marin Fund in its outreach work, but are also important as promotional materials for the nonprofits themselves and life-affirming for the people who are featured in them.

## Funding & Finances

FY 18-19 was an incredibly exciting year for West Marin Fund in relation to our funding and finances. We set a fundraising goal of \$900,000, and dramatically exceeded it, raising \$1,128,000! We were able to accomplish this thanks to the generosity of more than 170 donors, including one donor who offered a challenge grant of \$100,000 that was immediately matched by a second donor. To respond to this financial growth, we have strengthened our financial systems, improved our reporting, and increased the quality of our financial oversight due to the highly skillful and extensive experience of our Treasurer Cindy Ohama, our Finance Chair John Casaudoumeq, and our CPA Mark Mumm.

## Conclusion

We are immensely grateful for the ongoing and generous support of West Marin Fund donors, both the general support that we can use flexibly to realize our mission and goals and the dedicated funding to achieve a particular purpose. This past fiscal year has been an outstanding one and we look forward to keeping you informed of our progress as we respond to the needs of West Marin, its communities and nonprofits.

*“West Marin Fund graciously stepped forward with support when we were facing a number of challenges. As an artist, I have worked with the local Latino community with the goal of awakening within them the importance of their sharing that which they hold sacred. After five years, one can see and feel the comfort they are expressing in sharing with the town. And the Day of the Dead committee has seen the Anglo community honoring this tradition by embracing Day of the Dead as an important annual event.”*

- ERNESTO SANCHEZ

# COMMUNITY GRANTS PROGRAM

Our Community Grants Program began in 2013 and is open to all nonprofit groups and organizations serving West Marin. In FY 17-18, we completed two rounds of grantmaking and awarded 52 grants totaling \$164,500. We have streamlined our application process, increased the average size of grants from \$2,000 to \$4,000, and moved to one open round a year. This signature program continues to receive strong support from donors, nonprofit leaders, and community members. Thank you!

## Accomplishments from Round 10: “What’s Needed Most”

We have received the results of 28 community grants that were awarded in November 2017 for Round 10: “What’s Needed Most”. Below are 10 that show the broad array of initiatives supported by our Community Grants Program and the difference they make. For a full listing of our grants, go to [www.westmarinfund.org/grants](http://www.westmarinfund.org/grants).

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### **BOLINAS COMMUNITY CENTER** **\$3,000**

Improved disability access, so that the broader community can benefit from the local social services provided at the center as well as the classes and events

### **COASTAL HEALTH ALLIANCE** **\$3,000**

Recruited for the vital position of Controller, ensuring continuity of financial functions in its mission to serve the health of the community.

### **DANCE PALACE COMMUNITY & CULTURAL CENTER** **\$2,500**

Created two new revenue streams, including the Business Partners’ Program to create stronger relationships with the business community so the Center can better serve the entire community.

### **ENVIRONMENTAL ACTION COMMITTEE** **\$2,500**

Delivered outdoor education to more than 200 students in Marin County to explore, engage, and learn about the unique and diverse habitats within Marin County Parks and Open Space.

### **GREATER FARALLONES ASSOCIATION** **\$3,500**

Brought hands-on ocean science education to West Marin students who would not have otherwise received it.

### **KWMR** **\$3,000**

Installed new equipment so that the radio station can reliably bring information, entertainment and emergency updates to the communities of West Marin.

### **PAPERMILL CREEK CHILDREN’S CORNER** **\$4,000**

Created an outdoor classroom to promote physical activity and healthy eating, resulting in children’s greater autonomy to pursue their curiosity inside or outside, as well as a reduction in challenging behaviors.

### **SHORELINE ACRES PRESCHOOL** **\$4,500**

Provided scholarships for children to attend a safe and high-quality program, which alleviated the stress and anxiety faced by working families to find adequate child care.

### **WEST MARIN COMMUNITY SERVICES** **\$3,000**

Increased the reach of the Holiday Food and Gift Program to serve 430 individuals, including 232 children, all living in West Marin. 96% of the participants were Latino.

### **WEST MARIN SENIOR SERVICES** **\$2,500**

Developed a more robust fundraising system and increased funds at a time when County funds are less secure, and when more seniors are requesting vital services to remain independent in their homes in West Marin.

# AT A GLANCE FY 17-18

## Highlights

- Nearly doubled our revenues compared with FY 16-17
- Awarded 105 grants for a total of \$562,664, of which \$417,913 went to local nonprofits serving West Marin
- Refined our mission and values with a focus on equity and stewardship
- Established Costa-Levinson Fund and The Madrone Fund
- Created Women & Girls' Empowerment Program
- Produced two Stories of Change videos
- Appointed new board members Lazuli Whitt and Marcia Barinaga, and new advisors Peter Martinelli, Linda Mornell, Mark Switzer, and Steve Costa

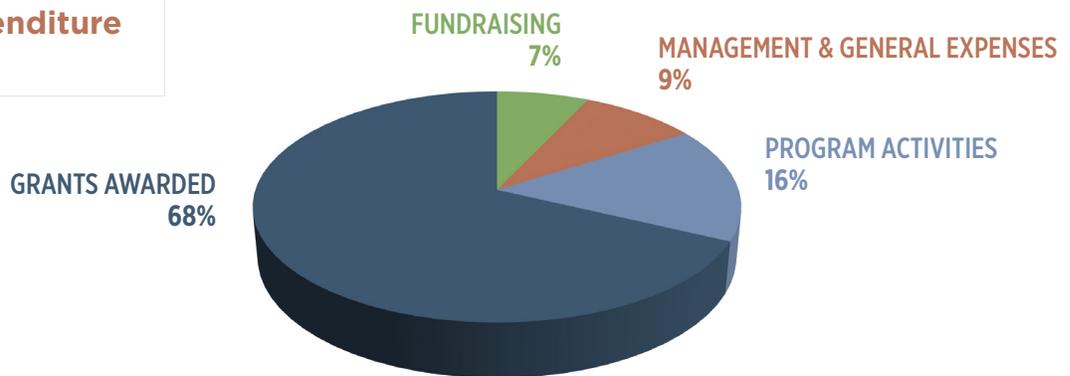
## Financials

West Marin Fund saw financial growth in all areas this year. Net assets include endowment funds, donor advised funds, and reserves. For questions about finances and investments, contact Sarah Hobson, Executive Director, [sarah@westmarinfund.org](mailto:sarah@westmarinfund.org).

	TOTAL INCOME	TOTAL EXPENDITURE INC. GRANTS	TOTAL GRANTS	NET ASSETS*
FY 17-18	\$1,181,860	\$827,979	\$562,664	\$1,533,896
FY 16-17	\$639,067	\$502,637	\$328,992	\$1,138,100

\*includes endowment funds, donor advised funds, and reserves.

**FY 18-19 Expenditure**  
**\$827,979**



**OUR MISSION STATEMENT** - West Marin Fund is a community foundation that inspires giving and mobilizes resources to enhance the long-term wellbeing and quality of life for all in Coastal West Marin.