



Todd Trust Status Report February 2013

*Community Foundation Sonoma County
and
Sonoma Valley Fund*

Todd Trust Background

- Community Foundation Sonoma County received notice late in 2009; named beneficiary of the Todd Trust, from the estate of Roland and Hazel Todd, estimated at \$8.5 million
 - 50% of the Trust will be placed in an Endowment Fund with payouts of ~\$125K per year, *in perpetuity*
 - The remaining 50% will be available for capital projects, with no annual funding limits.
- Funds are to be used “...to support charitable activity primarily in the Sonoma Valley, but also secondarily in Sonoma County generally, in the following areas:
 - Health and human services, especially for the sick, needy and elderly;
 - Governmental services which are underfunded, such as local fire, library, and healthcare districts; but not to include services provided by cities or counties;
 - Open space, specifically land and trail acquisition.”

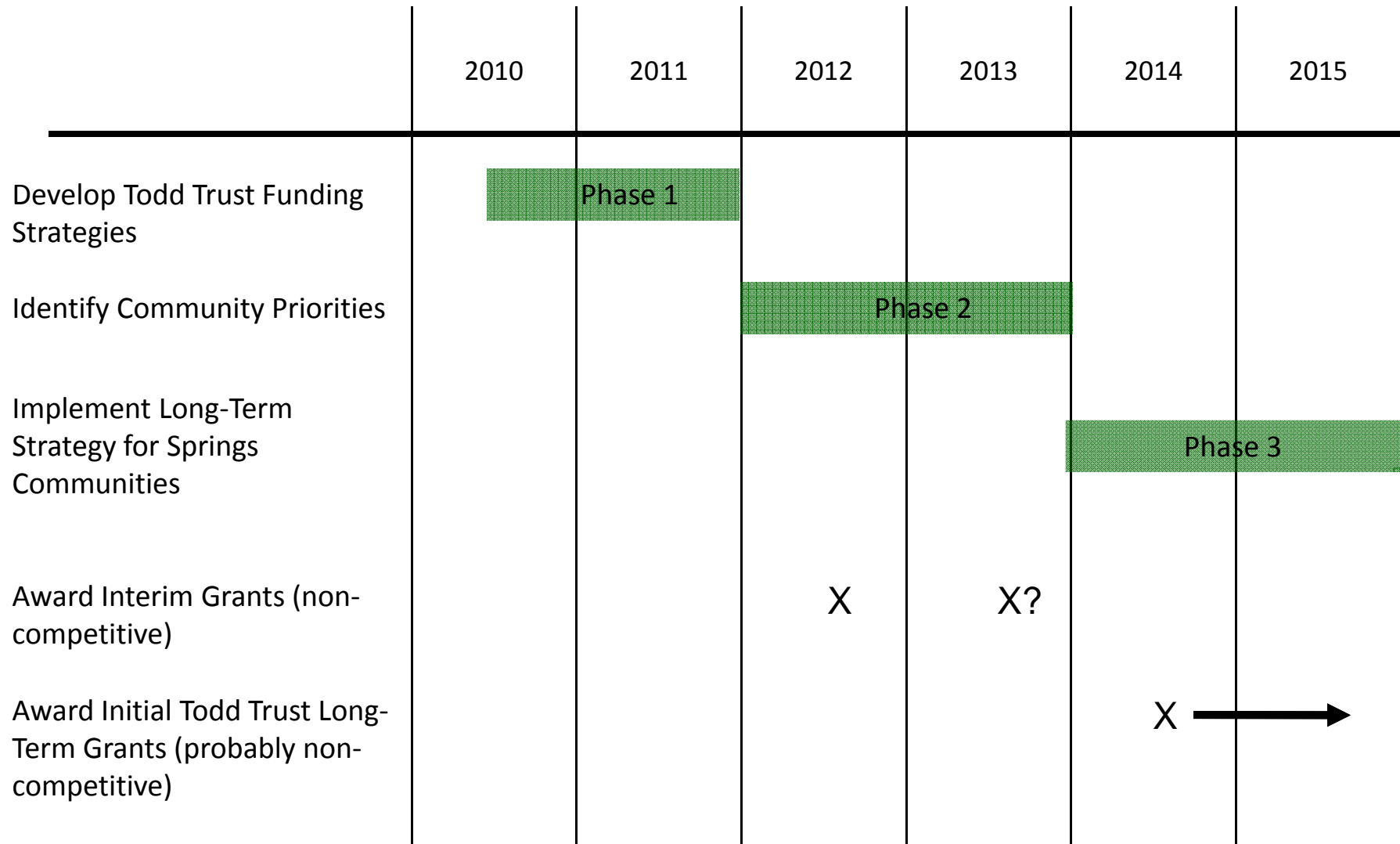


Todd Trust Team

- Todd Trust Team convened mid-summer 2010 to begin to identify community priorities that match the Todds' areas of interest, focusing on Sonoma Valley
- Team represents Community Foundation Sonoma County, Sonoma Valley Fund and the Sonoma Valley community
- Current Team members are: Harriet Derwingson (Chair), Loretta Carr, Alejandra Cervantes, Dianne Edwards, Ted Eliot, Cam Hawing, Barbara Hughes, Maite Iturri, Manuel Merjil, George Rathman, Dave Stollmeyer, Robert Judd (Staff) and Celia Bolam (Staff)
- Broad overall objectives are to identify funding areas or initiatives that:
 - make a high impact in meeting the needs of the community
 - demonstrate strong stewardship of donors' wishes and legacy
 - are long term in scope and potentially replicable elsewhere
 - demonstrate collaboration among various nonprofits, community groups, service providers
 - have the potential to appeal to additional funders



Todd Trust Timeline



Phase 1: Develop Todd Trust Funding Strategies

June 2010 – December 2011

Phase 1 Objectives and Deliverables

- Identify areas of greatest need in the Todd's fields of interest
- Focus initially on Sonoma Valley
- Establish goals and action plans for subsequent phases

Phase 1 Work Plan

- Established the Todd Trust Team, comprised of members from Community Foundation Sonoma County, Sonoma Valley Fund and the Sonoma Valley community
- Conducted a broad, structured interview program with >70 interviewees, several small groups and 15 follow up meetings and analyzed the results
- Commissioned demographic, employment and education trend report from Sonoma County Economic Development Board, focused on Sonoma Valley

Phase 1 Work Product/Recommended Reading

- Todd Trust Team Overview
http://www.sonomavalleyfund.org/reports/todd_trust_goals_priorities.pdf
- Todd Trust Broad Focus Report
http://sonomavalleyfund.org/reports/todd_trust_broad_focus.pdf
- Sonoma County Economic Development Report on Sonoma Valley
http://www.sonomavalleyfund.org/reports/sv_community_profile.pdf

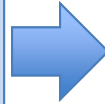


Phase 1: Findings and Decisions

Phase 1 Findings

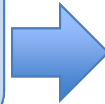
Decisions/Recommendations

Clear consensus that the greatest need, consistent with the Todd's wishes, exists in the Springs* area of Sonoma Valley



Early initiatives and funding will focus on the Springs

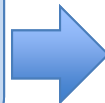
Interviews identified large Latino/Anglo barriers within the Springs as well as the rest of the Valley: lack of understanding and trust, in addition to physical, cultural, financial and language barriers



Phase 2 needs to focus on:

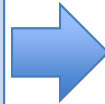
- ✓ Leveraging Springs community input to identify and prioritize needs;
- ✓ Building trust and communications

Many of the needs faced by the Springs community are multifaceted and require the skills of multiple individuals and organizations to solve



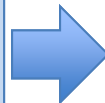
Grants will focus on establishing an integrated set of common goals that are addressed collectively by all grantee organizations and are unlikely to be awarded in a competitive process

Organizations and leaders exist in the Springs community doing great work, but they require help and support to build on their successes



Encourage collaboration when more effective results are evident. Support the continued development of both individual and organizational leadership

Building community trust and supporting leadership development and collaboration will take time



Interim grants will be made consistent with the Todd's wishes and these findings pending the outcome of Phases 2 and 3

* Springs area = Boyes Hot Springs, El Verano, Agua Caliente, Fetters Hot Springs



Phase 1: Primary Goal for use of Todd Trust Funds in the Springs Area*

To improve access to community resources by low-income and minority residents in the Springs, especially in the areas of health and human services. Priority will be given to services that are physically located in the Springs.

* Subsequent work on long term goals will integrate other aspects of interest to the Todds (e.g., Open space, grants outside of Sonoma Valley and underfunded governmental services).



Grants Awarded in 2012, Pending Phases 2 and 3

Grant Purpose	Recipient	Amount
To support the continued provision of dental services to low income residents in the Springs area through the purchase of a replacement mobile dental van (Challenge Grant)	St. Joseph Health System	\$100,000
To ensure continuation of ESL (English as a Second Language) classes with the closure of the Sonoma Valley Adult School due to budget constraints.	La Luz Bilingual Center	\$71,000
To support the implementation of a tutoring model to ensure third grade literacy competence. This grant provides partial funding to begin the program in the five Sonoma Valley elementary schools	United Way and Schools of Hope	\$42,300
To provide assistance in creating a community garden for Springs' residents at Larson Park in Agua Caliente	Sonoma Ecology Center	\$35,000
To support the 2012 Youth Initiative	Sonoma Valley Education Foundation	\$25,000
To provide emergency rental assistance for low income Sonoma Valley residents in crisis	La Luz Bilingual Center	\$12,000
To support a pilot for a third grade Summer Reading Academy at El Verano School, designed to increase reading proficiency for "rising" third graders	Sonoma Valley Education Foundation	\$3,200



Phase 2: Identify Community Priorities

January 2012 to December 2013

Phase 2 Objectives and Deliverables

- Identify high potential initiatives/solutions based on community input
- Put in place processes to overcome barriers, particularly around trust between the Springs community and the Sonoma Valley
- Support the continued building of leadership within the Springs community
- Support the ongoing collaboration among non-profits and other organizations working in the Springs

Phase 2 Work Plan

- Hire experienced grass-roots organizers to work with, and bring together, the community to identify and prioritize opportunities and needs
- Hold and facilitate forums and discussions throughout the community to gather input
- Identify and create leadership opportunities for members of the community including the offering of leadership training
- Put in place task forces to implement high potential initiatives
- Review progress of interim grants; consider future funding



Phase 3: Implement Long-Term Strategy for Springs Communities January 2014 - Onward

- Determine the scope of funding opportunities (i.e., which high priority programs or initiatives can be funded, which cannot)
- Design a long-term funding strategy and process to support the Springs project
- Design evaluation processes for both the near and long-term
- Identify (where possible) champions and funders for community-identified programs or initiatives that do not meet the Todd Trust criteria
- Target to make initial long-term grants from the Todd Trust, consistent with this overall process, in 2014
- Adjust funding priorities over time as needs change and/or evaluation indicates

