

**THE TODD TRUST:**  
Goal and Priorities for the Use of the Todd Trust  
to Support Charitable Activity Primarily in the Sonoma Valley  
(Version 12, May 20, 2011)

## Background of the Todd Trust

In late 2009, we received notice from the estate of Roland and Hazel Todd that the Community Foundation was a beneficiary of the Todd Trust, which is estimated to be valued at about \$8.5 million. For the first five years, the Trust is being managed by Wells Fargo and the trust payout is designated for distribution to the Community Foundation. After the five year period, Wells Fargo will turn management of the Trust fund over the Community Foundation. At that time, the Trust will be equally divided between a permanent endowment and an expendable capital fund. The bequest instructs us that both funds are to be used as follows: "...to support charitable activity primarily in the Sonoma Valley of Sonoma County, California, but also secondarily in Sonoma County generally, in the following areas:

- A. Health and human services, especially for the sick, needy and elderly;
- B. Governmental services which are underfunded, such as local fire, library, and healthcare districts; but not to include services provided by cities or counties;
- C. Open space, specifically land and trail acquisition."

Currently, the payout available for carrying out the Todd's instructions is between \$250,000 and \$300,000 annually. In order to assess community needs in the Valley and determine a goal for our use of the Trust in line with the Todd's instructions, the Community Foundation convened a group, known as the Todd Trust Team (the Team), whose members represent the Community Foundation, the Sonoma Valley Fund and the Valley community. Team members include Barbara Hughes, Dianne Edwards, Ted Eliot, Harriet Derwington, Donna Halow, David Stollmeyer, George Rathman, Loretta Carr, Joe Valentine and Robert Judd.

The Team began work in July of 2010 and are now far enough into the process of determining how to best use Todd Trust funds to see this as involving three phases: a Phase I of indentifying and assessing priority issues for the Sonoma Valley, which is completed; a Phase II of engaging with community resources to prioritize use of Todd funds; and a Phase III of commencing work to achieve our goals, evaluating our results and adapting our plans based on what we've learned. In order to bring the benefit of the Trust to the community as quickly as feasible, some elements of Phases II and III may happen simultaneously.

## PHASE I: Identify Priority Community Issues

### What We Have Done

1. We have completed the initial phase of gathering and assessing information, perspectives and ideas from the community through developing a structured interview process that was conducted with approximately 60 individuals and another 15 follow up meetings. We recorded what we heard and those notes have been compiled into an approximately 60 page document which is being edited. In addition, we have engaged the Sonoma County Economic Development Board to provide a report

detailing significant demographic, employment and education data and trends that are specific to the Springs communities.

2. We have completed an initial assessment of the responses we received and organized those into a series of:
  - a. Key findings
  - b. Potential impact areas
  - c. General strategies
3. We then shared these findings through meetings with three groups of interviewees to confirm the accuracy and completeness of what we heard.
4. Based on interviewee responses and our Team's assessment, we sought further input on findings and refined our assessment into a statement of a broad, long-term working goal for the use of the Todd Trust.
5. Based on that goal statement, we have developed a set of Todd Trust priorities for action, as described below
6. Simultaneous with the above steps, and taking advantage of the Sonoma Valley Fund's earlier nine month study involving 60 interviews and resulting in the creation of a Youth Initiative that has produced impressive outcomes, we committed \$77,000 of Todd funds as a challenge grant to support the Youth Initiative in 2011.

### **What We Have Learned**

From our conversations with more than 75 people who live in or are involved with the Sonoma Valley, we know that the principal challenge before us is to improve the health and well-being of low income people living in the communities of the Springs area (Agua Caliente, Boyes Hot Springs, Fetters Hot Springs and El Verano). There are the multiple barriers imposed by differences primarily between Anglo and Latino residents. These differences include: language; cultural customs and values; trust and understanding between cultures and generations; as well as physical barriers of distance; and, barriers caused by lack of income and education. In short, for low income persons, especially those of Hispanic language and culture, there is a pervasive lack of access to the resources provided for the larger Valley community.

When we speak of "health and well-being", we mean them in the largest, interrelated sense of the words: very broadly, we are referring to what it means "to be well". We include commonplace aspects such as basic needs for food, shelter, health, education, employment, recreation, socialization, and more. We also include factors such as a sense of being accepted and heard; of having hope; of meeting one's basic needs for self and family; and to make a difference to others. Based on what we've learned, we have formulated the following working statement of our goal for how Todd funds are used.

### **Our Working Goal**

***To improve the health and well-being of residents of the Sonoma Valley so that they, and succeeding generations, are healthier and have more opportunity to succeed at their life goals and to experience the fulfillment of contributing to the well-being of their community.***

With this single goal, it is possible for us to cover all three of the Todd's focus areas (health and human services, under-funded government services, and open space acquisition) by simply broadening our perspective to include increasing the access of sick, needy and elderly residents to the community's resources. Our goal then is not limited to increasing access to just the community's health and social services; it also includes increasing access to the community's physical space and facilities (including open space and trails) for engaging all people within the community in cultural, recreational and social

activities, as well as supporting those aspects of under-funded government infrastructure that provide and sustain essential elements of the community's well being.

## **Achieving Our Goal**

Our interviews have suggested that we should think big and we have agreed that we want to do something that the community will notice and long remember. These big assumptions, and the long time and large resources it takes to change social values and behaviors, suggest that we should envision working on our goal over a long time period, perhaps as much as ten to fifteen years. We should think of our engagement in the Springs as creating something that, in the mind of future donors, can define our capacity to effectively and fully implement a donor's dream for how their contribution will be used.

There are a number of existing organizations and well established processes in place in the Springs dealing with community issues, including the Community Health Clinic, the Redevelopment Advisory Committee, the Springs Community Alliance, La Luz, and Nuestra Voz to name a few. In addition, while all these groups do represent Springs community interests to some degree, there is a need to increase the participation of those who live in the Springs. In response, our immediate job is to get better connected both to existing organizations and to those people in the neighborhoods who want to have role in building access to the larger community's resources.

The goal of getting better connected is to assess how the Todd Trust Team can most effectively work with existing structures using the trust and relationships we have built combined with the resources provided to us by the Todds to carry out the Todd's wishes. As we assess what our role (or roles) should be, we need to keep in mind the following main priority and two supporting priorities:

**Our Main Priority Is Improving Access:** Focus should include both the physical aspects, such as a possible move of the Community Health Center to a Springs location and access to community services, as well as decreasing cultural barriers faced by Springs residents (such as language, trust, family structure, literacy), and the creation of nearby open space and community spaces, as well as community control of what happens where they live.

**Improving Collaboration and Developing Shared Goals:** As the Community Foundation and the Sonoma Valley Fund develop their role and relationships within the Springs, we should be a role model for listening, collaborating and facilitating a process of reaching agreement on common values, as well as encouraging all participants to adopt a common set of outcomes.

**Increasing Community Contribution and Ownership:** Our engagement with increasing access can also provide a means of building local leadership while reaching out to the Springs communities, helping local organizations to include Latinos and low income residents in the process of determining what might be successful ways of increasing health and human services access. At the same time, both we and local service providing organizations need to develop better trust especially with Latinos and accept a responsibility for being accountable with local residents for what takes place in their communities.

We need to be mindful not only of "our" goals as we work with local individuals and groups, but also think in terms of goals that are shared by the community and are consistent with the Todd's instructions to us. We should aim to produce measurable outcomes within three years. As specific outcomes and a timeframe are established, we should also create a means of evaluating progress and

establish a goal of doing a major review by the end of three years. As the evaluation is completed, we can use its results to inform the next stage of meeting community goals for improving health and well-being for Springs residents.

## PHASE II: Engage With Community Resources to Develop Shared Goals

1. In the short term, be aware of opportunities for the Community Foundation and the Sonoma Valley Fund to provide small grants to support the work of other groups in the Springs whose plans are consistent with the Team's goal and priorities and the Todd's wishes.
2. Evaluate how the Team can work most effectively with existing community resources while building relationships of trust.
  - a. Expand the Team to include up to three bilingual local residents
  - b. Add a part-time bilingual/bicultural staff to keep the Team's work moving as expeditiously as possible
  - c. Identify individuals, groups, and organizations that are already engaged with the same priorities as ours. For example:
    - i. Participate in the Health Roundtable
    - ii. Attend the Redevelopment Advisory Committee meetings
    - iii. Identify other public gatherings such as the Springs Community Alliance
    - iv. Continue to develop relationships with organizations such as FISH, Nuestra Voz, the Community Health Center, Burbank Housing, the School District, La Luz, St. Leos, as well as individuals such as Alejandra Cervantes, Gabriel Navarro, Mario Castillo, Kara Reyes, Noris Benet and others that are active in the Springs
  - d. Identify each group's agenda for and contributions to the Springs, note similarities and differences in their priorities, membership and goals and assess their fit with the Team's priorities
  - e. Assess each group's work, openness to partnering, as well as their effectiveness.
3. Determine what next steps the Team can take using Todd funds to partner with the groups in achieving shared outcomes.
4. Develop work plans, budgets and evaluation tools for the partnerships.
5. Make enough progress in this phase by the end of 2011 to be able to propose a three-year plan of involvement with the Springs to the Community Foundation and Sonoma Valley Fund boards by February of 2012.

## PHASE III: Commence Work on Improving Access and Evaluate Results

1. As work plans are implemented and we assess what happens, we adapt our strategies to take advantage of our experience to improve our outcomes.