



WILLAMETTE VALLEY
WINE **FOUNDATION**

ANNUAL REPORT 2022

Elk Coves Five Mountain Vineyard



**KIM
BELLINGAR**

FOUNDING
BOARD CHAIR

In 2019 the Willamette Valley Wineries Association established an initiative to create a 501c3 organization to focus and expand its philanthropic outreach. In late 2021 the Willamette Valley Wine Foundation (Foundation) was formally founded and the IRS retroactively approved its tax-exempt status in mid-2022. This Annual Report is intended to provide an overview of the strategic intent, start-up activities, and first-year financial report of the Foundation.

The Foundation originated in the desire of many people in our industry to make substantial philanthropic investments to better the lives of vineyard and wine stewards, tourism workers, and the many other community members on whom we rely. We firmly believe that through astute, targeted investments we can initiate substantial improvements in our region by working cooperatively with partner organizations, with whom we are already engaged.

We have all witnessed the numerous challenges that confront the working families on whom we depend. Therefore, our vision is to cultivate thriving and inclusive communities that provide place-based, holistic access to healthcare, early childhood care and education, affordable housing, and personal opportunity for those who live, work, and play in the Willamette Valley.

Many individuals have enthusiastically joined the effort to form the Foundation because we believe our future will be actively created or we'll live with a future we are given. Like all of us, I am sure you would prefer the future we create together.

Join us.

Your help with this effort will be greatly appreciated and, I believe, deeply rewarding.

FOUNDATION MISSION

MISSION
Systemic Community Impact

CORE VALUES
Collaboration, Community Building
& Transformation

BENEFACTOR SUPPORT
Planned Giving & Estate Gifts

The Willamette Valley Wine Foundation will Enhance the Wellbeing of Winegrowing Communities in the Willamette Valley through the collaborative support of affordable housing communities enriched with early childhood education and care, health services, and personal development opportunities.

With Diversity, Equity and Inclusion as an overarching lens through which we work, the Willamette Valley Wine Foundation embraces the following values.

Collaboration – We value the experiences and contributions of existing organizations, and leverage strategic partnerships to multiply our impact.

Community Building – Utilizing place-based resources and lived-experience, we develop associations that eliminate disparities and promote social justice in our communities and place of work.

Transformation – Our initiatives create life-changing enhancements to individuals' and families' health, homes, personal development, and livelihoods.

The Foundation's mission will be funded by charitable gifts, fundraising campaigns, wine related initiatives, partnerships with private foundations, and public grants.

Systemic benefits will be created through working partnerships that leverage public and private resources and focus them on marginalized agricultural communities.



RESOURCES

- The viability of the Foundation is facilitated with uncommon advantages.
- A sizeable cadre of known, reliable partner organizations with a long track record of engagement with the Valley's winegrowing communities.
 - Committed, experienced volunteer leadership representing a broad cross-section of the industry and individuals with lived experience serving our communities.
 - Significant start-up support from the Willamette Valley Wineries Association and contributions from early investors and Board members.
 - An inherently diverse Board of Directors composed of individual with a proven track record of effective, practical solutions and success in their endeavors.



BOARD OF DIRECTORS 2022

- | | | |
|---|-------------------------------|--|
| Kim Bellingar
Founder & Director, Bellingar Estates | FOUNDATION CHAIR | Leda Garside
Manager & Cultural Liason, !Salud! Services |
| Rosie Andalón
Director of Real Estate Development, CASA of Oregon | FOUNDATION VICE CHAIR | José Lopez
Manager of Operations, Results Partners |
| Tom Hellie
President Emeritus of Linfield University | FOUNDATION VICE CHAIR | Gerardo Partida
Group Coordinator, Community Home Builders |
| Mike McNally
Proprietor, Fairsing Vineyard | FOUNDATION SECRETARY | Annie Shull
Proprietor, Raptor Ridge Winery |
| Bill Sweat
Proprietor, Winderlea Vineyard and Winery | FOUNDATION TREASURER | Chevonne Ball
Proprietor, Dirty Radish Travel Company |
| Morgen McLaughlin
Foundation Executive Director | FOUNDATION EXECUTIVE DIRECTOR | Sofia Torres-McKay
Proprietor, Cramoisi Vineyard |

2022 INITIATIVES & PARTNERSHIP PROJECTS

CORNERSTONE CAMPAIGN

Contributions to a Cornerstone campaign funded the Foundation's first year of operations. Benefactors included the Erath Family Foundation, Hampton Family Foundation, Northwest Farm Credit, Springboard Foundation, and the Foundation's Directors.

LAYING THE GROUNDWORK PROJECT

The Foundation completed a project to lay the groundwork for fundraising with the support of Johnson Grossnickle and Associates. The deliverables of that project included: i) early strategy definition, ii) potential donor identification, iii) development of a Preliminary Case for Support, iv) a fundraising feasibility study, and v) a final report. The project's final report provided feedback on the Foundation's strategy, an assessment of fundraising capacity, recommendations, and action plans for a fundraising campaign.

ASSESSING NEEDS | Developing Partnerships

Over the past few years the Foundation's leadership has assessed the needs of our wine-growing communities and opportunities for serving those needs. That investigation involved extensive conversations with organizations that serve those needs. It has also led to early partnerships.

LATINO EARLY CHILDHOOD EDUCATION & CARE

The Foundation has collaborated with CAPACES Leadership Institute to establish a consortium to create best-in-class Early Childhood Education and Care in the Mid-Willamette Valley. The mission and strategic objectives of consortium is being implemented through leadership provided by six member companies.

ASSESSMENT OF AFFORDABLE SINGLE FAMILY HOME ALTERNATIVES

The Foundation and Community Home Builders (CHB), one of its partners, conducted a project to identify and evaluate alternatives for extending the benefits of affordable housing to a larger population of low-to-moderate income families. CHB has developed two-hundred and sixty (260) single-family homes for low-to-mid income families utilizing USDA's Mutual Self Help program.

STRATUS AFFORDABLE HOUSING APARTMENT COMMUNITY

The Housing Authority of Yamhill County is developing STRATUS, a 175 affordable apartment community, in McMinnville. To advise the project, the Foundation sponsored a focus group with vineyard stewards. We also provided a letter of support to assist in funding the project.



FINANCIAL REPORT

INCOME STATEMENT

TOTAL INCOME [DONATIONS]	\$144,320
TOTAL EXPENSES	\$79,556
NET INCOME	\$64,764

BALANCE SHEET

TOTAL ASSETS	\$65,264
TOTAL LIABILITIES	\$500
TOTAL EQUITY	\$64,764
TOTAL LIABILITIES & EQUITY	\$64,264



FUTURE INITIATIVES

- Bolster the Early Childhood Education and Care workforce through scholarships and stipends
- Support and leverage investments in early learning and care programs in existing work-centered affordable housing communities
- Support life changing educational and advancement opportunities for our vineyard stewards and others to build financial equity, and advance careers
- Drive the delivery of health services to our winegrowing community by leveraging support for current local providers like ¡SALUD!
- Invest in the development of affordable housing communities that provide integrated place-based resources to enhance the wellbeing of their residents and the surrounding community
- Unlock the potential for additional available public funds to drive our momentum and leverage success





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WINE **FOUNDATION**

willamettevalleywinefoundation.org