

Elk Cove's Five Mountain Vineyard
PHOTO | Anna Campbell



WILLAMETTE VALLEY
WINE **FOUNDATION**



**ROSIE
ANDALÓN**

CHAIRPERSON

Dear Friends,

It's been an exciting year for the Willamette Valley Wine Foundation. Since our inception in 2019, and our formal tax-exempt designation in 2022, we have been diligently working to build our capacity and to hone our mission: To transform communities by enhancing the health, homes, and livelihoods of workers in wine-growing communities throughout the Willamette Valley.

In 2023 we focused our work on building a more experienced and representative Board of Directors. We now have 16 industry experts – each with culturally relevant and lived experience in all four of the fields we aim to support: access to quality, affordable and culturally specific health care, affordable housing, early childhood education and care, and personal and professional development. This group of remarkably dedicated volunteers are passionately committed and deeply engaged in the day-to-day, hands-on work that it takes to successfully build an organization that will transform the communities within which we all live, work, and play long into the future. I am proud to work alongside all of them.

In addition, we have successfully launched our first fundraising campaign, The First Leaf Initiative. With this effort, we are working to raise \$2 million by the end of the 2024 calendar year. I'm happy to report that we are off to a great start and already have many passionately committed early supporters joining our efforts. Along with these efforts, our work in building strong partnerships has already resulted in leveraging significant public funding into important projects and programs aligned with our mission.

I hope you enjoy reading about our success in the past year and that our successes inspire you to learn more – and to join with us as we build a future that can support all of those living in our wine growing and making communities in the Willamette Valley.

Rosie Andalón

Willamette Valley Wine Foundation
Board Chair

FOUNDATION MISSION

MISSION

Systemic Community Impact

Rooted in the collaborative spirit of early Oregon wine innovators, the Willamette Valley Wine Foundation exists to transform communities by enhancing the health, homes, and livelihoods of workers in wine-growing communities throughout the Willamette Valley.

In collaboration with established partners, we are dedicated to convening resources that create transformational opportunities in our communities in these four key areas:

- Affordable Housing
- Access to Quality and Affordable Health Care Services
- Early Childhood Education and Care Resources
- Personal and Professional Development Opportunities

Together we are building brighter futures for all of us!

CORE VALUES

Collaboration, Community Building
& Transformation

Through the lens of social justice, the Willamette Valley Wine Foundation embraces the following values:

Collaboration – We value the experiences and contributions of existing community based organizations and work to convene resources and build strategic partnerships to multiply our impact.

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

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

PHILANTHROPIC SUPPORT

The Foundation's mission is funded by private contributions from individuals, organizations, wine-related initiatives, and partnerships with private foundations which we then strategically leverage into driving additional public funding for projects that align with our core values.

PHOTO:

Lucy Escobar, behind the computer, from CAPACES Leadership Institute, conducts a focus group to recruit the next cohort of students working to obtain their certifications as licensed Family Child Care providers through the Primeros Pasos program.



BOARD OF DIRECTORS 2023

Rosie Andalón CHAIRPERSON
Director of Real Estate Development, CASA of Oregon

Kim Bellingar VICE CHAIRPERSON
Founder & Director, Bellingar Estates

Mike McNally SECRETARY
Proprietor, Fairsing Vineyard

Bill Sweat TREASURER
Proprietor, Winderlea Vineyard and Winery

Morgen McLaughlin EXECUTIVE DIRECTOR
Foundation Executive Director

Tom Hellie
President Emeritus of Linfield University

Leda Garside
Manager & Cultural Liason, !Salud! Services

Maria Fernandez
Director: Equity, Outreach & Inclusion
The Research Institute WOU

Page Knudsen Cowles
Managing Partner, Knudsen Vineyards

Kathie Byers
Founder & Co-Owner, Glorie Cookies

Gerardo Partida
Group Coordinator, Community Home Builders

Ian Lombard
Managing Partner, Casparian Capital Management

Annie Shull
Proprietor, Raptor Ridge Winery

Sheila Pruitt
Proprietor, La Luce Vineyard

James A. Thommes, MD
Co-Founder & Proprietor, Two Mules Vineyard

Miguel Lopez
Proprietor, Red Dirt Vineyard Management Company

RESOURCES

The viability of the Foundation is facilitated with uncommon advantages.

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



2023 INITIATIVES & PARTNERSHIP PROJECTS

BOARD EXPANSION, STAFFING, AND STRATEGIC INTENT

In 2023 seven new Board Directors were added to provide an expanded breadth of experience and expertise. A Campaign Director was hired to lead fundraising strategy, communications, and outreach. The expanded Board participated in a process to refine the Foundation's strategic intent. Our near-term strategic focus is to create and provide funding for transformational opportunities through working with experienced partners and leveraging access to public and private resources.

PUBLIC RELATIONS AND COMMUNICATIONS

The Foundation received a grant from the M.J. Murdock Charitable Trust that is being utilized to define the Foundation's branding strategy, develop an overall communication and public relations strategy, and expand the Foundation's website functionality and build associated photographic collateral assets.

PRIMEROS PASOS EARLY CHILDHOOD EDUCATION AND CARE

The Foundation co-developed Primeros Pasos - a consortium of organizations creating best-in-class Early Childhood Education and Care for Latino families in the Mid-Willamette Valley. The consortium is recruiting and training early educators and providing resources for new Family Child Care Homes. Primeros Pasos impacts led by the WVWF in 2023 include:



- Clackamas Community College Spanish based early educator college degree program,
- IGA grant for scholarships to fund a cohort of 20 future educators at CCC - \$100,000,
- Child Care Alliance grant for business training and coaching of existing early educators,
- Oregon Community Foundation capacity building grant - \$125,000,
- Seeding Justice capacity building grant - \$1,250,000,
- YCCO grant to develop early learning centers and apprenticeships - \$733,000.

PHOTO:

Teaching in a family childcare home, this educator is able to work towards her ECE license. Obtaining full licensure with support from Educator Workforce Programs funded in part by the WVWF can open doors to additional public funding; helping her grow her business and in turn, closing the quality, culturally appropriate child care and education gaps in our communities.



2023 INITIATIVES & PARTNERSHIP PROJECTS

STRATUS VILLAGE AFFORDABLE APARTMENT COMMUNITY

The Foundation continues to support Housing Authority of Yamhill County's Stratus Village, a 175-unit affordable apartment community, in McMinnville. Impacts directly related to WVWF advocacy in 2023 include:

- Facilitated access to \$6.2 million of Agricultural Workforce Housing Tax Credits
- Ensured 16 affordable apartments were set aside for agricultural workers
- Committed to conducting early outreach to vineyard stewards to secure available units

OTHER AFFORDABLE HOUSING PARTNERSHIPS

The Foundation is nurturing partnerships with numerous affordable housing developers including Farmworker Housing Development Corp, Bienestar, Community Home Builders, and Casa of Oregon. The intent is to complement their projects with on-site/place-based resources to support health care, early learning programs, and personal and professional development opportunities.

EXPANDING HEALTHCARE ACCESS

The Foundation is investigating opportunities to expand access to healthcare programs like ¡Salud! Services and other Federally Qualified Health Centers. One of those opportunities is expanding access to Traditional Health Workers. Under the umbrella of Traditional Health Workers, the Oregon Health Authority certifies Community Health Workers, PEER Recovery Support Specialists, and DULA Maternal Health Professionals. The WVWF is actively fundraising to support these programs with the hopes of launching at least one project by the Fall of 2024.



PHOTO: An artist's rendering of the Stratus Village apartment complex. With the help of the Willamette Valley Wine Foundation, this project is now scheduled to break ground on 175 units of affordable housing in McMinnville in June 2024.



FINANCIAL REPORT

INCOME STATEMENT

TOTAL INCOME [DONATIONS]	\$537,450
TOTAL EXPENSES	\$62,433
NET INCOME	\$475,017

BALANCE SHEET

TOTAL ASSETS	\$543,493
TOTAL LIABILITIES	\$3,712
TOTAL EQUITY	\$539,781
TOTAL LIABILITIES & EQUITY	\$543,493





FIRST LEAF CAMPAIGN

BUILDING MOMENTUM

In late 2023 the Foundation began the quiet phase of a \$2 million fundraising campaign – The First Leaf Initiative. The Foundation plans to launch the public phase of this campaign in the Fall of 2024. Generous contributions have already been committed in support of this campaign, including 100% participation in funding from all of our WVWF Board members.

While the Foundation's ultimate goal is to be a catalyst for creating intentional communities with access to place-based, systemic services, there are great projects already underway. The target use of funds from the First Leaf Campaign includes:

- Early Childhood Education and Care - \$500,000
 - . Educator workforce development and new family childcare homes
- Quality, Affordable Health Care Services - \$500,000
 - . Expanding community-based resources and training for Traditional Health Workers
- Affordable Housing - \$500,000
 - . Support partners' development projects that include on-site/place-based services
- Personal and Professional Development Opportunities - \$250,000
 - . Scholarships and Individual Development Accounts (IDA) and scholarships
- Operating Capital - \$250,000
 - . Complement current volunteer support with critical operating resources



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