

# NAPA VALLEY

## COMMUNITY FOUNDATION

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January 4, 2008

Dear Friends,

Thank you!

Because of your support, we distributed nearly \$450,000 in grants from our *Community Impact Funds* in 2007.

Attached please find a document that includes:

- A summary of donors involved and grants distributed
- A one-page report for each *Community Impact Fund*
- A metric in each report called "Donor Buying Power," which aims to hang a figure on an old adage – that there is strength in numbers.

I would very much like to hear your feedback on our report. To be honest, it was a challenge in some cases to talk about what we're doing, because we don't yet know whether some of our grants are producing the results we hope to achieve.

This, of course, is to be expected, as helping nonprofits change the world around them takes time. (In fact, precisely for this reason, we're committed to providing multi-year grants from *Community Impact Funds*.)

Still, we worked hard to strike a balance between brevity and detail; and what we know and what we don't. I hope the attached is useful, and might serve as the starting point for a conversation with you about a particular Fund (or Funds) that captures your imagination.

On behalf of the Board of Directors and staff of the Napa Valley Community Foundation, thank you once again. I hope you'll call me or Marla Tofle with any questions you have about the pages that follow.

Sincerely,




Terence P. Mulligan  
President

# NAPA VALLEY

## COMMUNITY FOUNDATION




– Community Impact Funds: Summary –

| Fund  | 2007 Grants | Donors  |  |
|---|-------------|---|--|
|  <p>FUND FOR AMERICAN CANYON</p>             | \$22,000    | <ul style="list-style-type: none"> <li>• Aegis American Canyon, LLC</li> <li>• Anonymous</li> <li>• The James Irvine Foundation</li> </ul>  |  |
|  <p>FUND FOR THE ARTS</p>                    | \$130,000   | <ul style="list-style-type: none"> <li>• 1% for Our Community Fund</li> <li>• Lauren Ackerman</li> <li>• Anonymous</li> <li>• Richard &amp; Annie Bennett</li> <li>• Dr. Alvin Lee Block</li> <li>• CDI/Hatt Market</li> <li>• Charter Oak Fund</li> <li>• Dey Leadership Fund</li> <li>• The Estate of Lylah M. Schieck</li> </ul>   | <ul style="list-style-type: none"> <li>• Freed Family Fund</li> <li>• Jaeger Family Fund</li> <li>• Jewish Community of Napa</li> <li>• Bill &amp; Carol Kieschnick</li> <li>• Dave &amp; Jane Meyers</li> <li>• Muh Family Fund</li> <li>• Old Kraft Fund</li> <li>• Optimista Fund</li> <li>• Sato Family Fund</li> <li>• Tulsa &amp; Simone Fund</li> </ul> |
|  <p>FUND FOR CALISTOGA</p>                 | \$43,850    | <ul style="list-style-type: none"> <li>• Anonymous</li> <li>• Dey Community Fund</li> <li>• Charlie Johnston</li> <li>• The James Irvine Foundation</li> <li>• The E. Richard Jones Family Foundation</li> <li>• Sally &amp; Rick Jones Family Fund</li> <li>• WWJD Fund</li> </ul>   |  |
|  <p>CAPACITY GRANTS FUND</p>               | \$25,000    | <ul style="list-style-type: none"> <li>• Lauren Ackerman</li> <li>• The Estate of Lylah M. Schieck</li> <li>• Sally &amp; Rick Jones Family Fund</li> <li>• The Kobrand Foundation</li> <li>• Justin Meyer Scholarship Fund</li> <li>• Opportunity Fund</li> <li>• Sato Family Fund</li> <li>• Walton Family Fund</li> </ul>  |  |
|  <p>IN SCHOOL &amp; OUT OF SCHOOL FUND</p> | \$75,000    | <ul style="list-style-type: none"> <li>• Anonymous</li> <li>• Charter Oak Fund</li> <li>• Cort Goldman Family Fund</li> <li>• The Estate of Lylah M. Schieck</li> <li>• Freed Family Fund</li> <li>• Robert &amp; Ellen Imrie Charity Fund</li> <li>• Jaeger Family Fund</li> <li>• Sally &amp; Rick Jones Family Fund</li> <li>• The Napa Fund</li> <li>• Sato Family Fund</li> <li>• Tulsa &amp; Simone Fund</li> </ul> |  |

# NAPA VALLEY

## COMMUNITY FOUNDATION

– Community Impact Funds: Summary (Continued) –

| Fund   | 2007 Grants     | Donors  |   |
|--|-----------------|---|---|
|  <p>NEIGHBORS FUND</p>            | <p>\$21,200</p> | <ul style="list-style-type: none"> <li>• Anonymous (8)</li> <li>• Auction Napa Valley</li> <li>• Bell Products Fund</li> <li>• Blessings from Heaven Fund</li> <li>• Richard &amp; Annie Bennett</li> <li>• Mr. &amp; Mrs. Rodney Block</li> <li>• Bruce &amp; Rosemary Cakebread</li> <li>• Fred Caspersen Fund</li> <li>• Charter Oak Fund</li> <li>• Cort Goldman Fund</li> <li>• Dey, L.P.</li> <li>• Diageo North America</li> <li>• Doctors Company</li> <li>• J.E. Engle</li> <li>• First Presbyterian Church of Napa</li> <li>• Freed Family Fund</li> <li>• Carolyn Fruchtenicht</li> <li>• Mr. &amp; Mrs. David Gilbreth</li> <li>• Patrick &amp; Pamela Gleeson</li> </ul> | <ul style="list-style-type: none"> <li>• Margaret Hager</li> <li>• Jaeger Family Trust</li> <li>• Jaqua Family Fund</li> <li>• Sally &amp; Rick Jones Family Fund</li> <li>• Macke Family Fund</li> <li>• Patsy Mc Gaughy &amp; John Marx</li> <li>• Old Kraft Fund</li> <li>• Opportunity Fund</li> <li>• Optimista Fund</li> <li>• Palmisano Family Foundation</li> <li>• Janet Peterson</li> <li>• Silver Sensations by Saxon &amp; Leonard</li> <li>• Soroptimist International of Napa</li> <li>• St. Mary's Episcopal Church</li> <li>• Kevin Tabb</li> <li>• UBS Financial Services Community Fund</li> <li>• Vanguard Charitable Endowment Program</li> <li>• Ivy Archer Winters</li> </ul> |
|  <p>FUND FOR ST. HELENA</p>     | <p>\$51,500</p> | <ul style="list-style-type: none"> <li>• Anonymous</li> <li>• Bruce &amp; Rosemary Cakebread</li> <li>• The James Irvine Foundation</li> <li>• The E. Richard Jones Family Foundation</li> <li>• Sally &amp; Rick Jones Family Fund</li> <li>• The Kobrand Foundation</li> <li>• Lolo's Second To None</li> <li>• Palmisano Family Foundation</li> </ul>  |   |
|  <p>STRONG COMMUNITIES FUND</p> | <p>\$72,500</p> | <ul style="list-style-type: none"> <li>• Anonymous</li> <li>• Charter Oak Fund</li> <li>• The Jackson Family Foundation</li> <li>• Jaeger Family Fund</li> </ul>  |   |

**Total      \$441,050**

# NAPA VALLEY

## COMMUNITY FOUNDATION



FUND FOR  
AMERICAN CANYON

Mission: To provide more resources to nonprofit programs in American Canyon.

- Inception Date: September 2004
- Total Grants: \$46,015
- 2007 Grants: \$22,000
- Number of Donors: 3
- Donor Buying Power: \$1 = \$2<sup>^</sup>

### *What's Happening*

- Investing in programs that
  - Give American Canyon youths, ages 14-24, opportunities to develop themselves as students and as leaders
  - Expose teens and young adults in American Canyon to the broader world of career and citizenship
  - Provide avenues for kids to get their voices heard and participate in their local communities
- We provided funding in 2007 for six projects, including
  - Teen-designed and teen-organized programs, such as career fairs and college-preparation workshops
  - Personal finance and budget workshops
  - Cultural field trips to sites in San Francisco, including Steinhart Aquarium and Chinatown
  - Vocational "summer camp" for college-age youth

### *What We're Learning (+ and -)*

- There is no dedicated space for teens and young adults in American Canyon—often kids congregate at friends' homes and at strip malls—and lack of space makes it quite difficult to create local programs for them
- Many of American Canyon's leadership-oriented teens have recently moved on to college, so there is a need to engage a new crop of kids
- Youth development for teens is expensive—programs need to pay experienced staff who'll stay around for the long haul, so there is consistent mentoring that builds kids' trust

### *What's Next*

- Attracting a broader base of donors to support the Fund
- Ongoing evaluation of Am Canyon needs against the Fund's focus areas
- Continuing to monitor grantees' progress

<sup>^</sup> For every \$1 contributed to the Fund by a donor, how many dollars have been distributed from the Fund? This is the ratio, in dollars, of 1: [(Total Grants from Fund) / (Average Contribution to Fund)].

# NAPA VALLEY

## COMMUNITY FOUNDATION



FUND FOR THE ARTS

Mission: To help the arts and culture sector in Napa County weather recent challenges and begin to thrive.

- Inception Date: November 2005
- Total Grants: \$212,300
- 2007 Grants: \$130,000
- Number of Donors: 19
- Donor Buying Power: \$1 = \$19<sup>^</sup>

### *What's Happening*

- Investing in
  - Dialogue among arts groups
  - Capacity of Arts Council of Napa Valley (ACNV)
  - "Cultural plan" for Napa County
- Grants to ACNV helped them
  - build a new, more powerful board
  - become an effective trade association for Napa County's arts sector
  - develop a cultural plan based on hard data and community input
- Our investment attracted other funders
  - \$100,000 from private donors to ACNV
  - \$288,000 from Napa County Transient Occupancy Tax (TOT) to implement a cultural plan
  - \$50,000 from Hewlett and other foundations for the cultural plan
- The arts sector is beginning to stabilize after a rocky two-year patch; major groups are at the table and keen to collaborate

### *What We're Learning (+ and -)*

- Infrastructure is essential. Making ACNV stronger should help the whole sector by creating a coordination point for policy change, visitor marketing
- The policy climate for the arts must change for the sector to thrive; TOT funding is a great first step, but other counties have "% for Arts" ordinances; zoning incentives; dedicated TOT allocation, etc.
- We can't make it work without tapping into visitors

### *What's Next*

- Funding to explore closer cooperation among local arts groups
- Ongoing evaluation of needs against the Fund's focus areas
- Attracting a broader base of donors to support the Fund

<sup>^</sup> For every \$1 contributed to the Fund by a donor, how many dollars have been distributed from the Fund? This is the ratio, in dollars, of 1: [(Total Grants from Fund) / (Average Contribution to Fund)].

# NAPA VALLEY

## COMMUNITY FOUNDATION



Mission: To provide more resources to nonprofit programs in Calistoga.

- Inception Date: June 2004
- Total Grants: \$87,650
- 2007 Grants: \$43,830
- Number of Donors: 7
- Donor Buying Power: \$1 = \$5<sup>^</sup>

### *What's Happening*

- Investing in programs that
  - Give Calistoga youths, ages 14-24, opportunities to develop themselves as students and as leaders
  - Expose Calistoga teens and young adults to the broader world of career and citizenship
  - Provide avenues for kids to get their voices heard and participate in their local community
- We provided funding in 2007 for eight projects, including
  - Healthy relationships workshops for high school students
  - Innovative art workshops designed to increase language fluency for high school kids who are English learners
  - Afterschool program in which high school students mentor elementary school children
  - Documentary film-making workshop for low-income Latino youths

### *What We're Learning (+ and -)*

- Most Calistoga high school- and college-age kids also have jobs, so programs must either be worked into the school day or be compelling enough to merit inclusion in busy schedules
- Our grants have encouraged nonprofits from outside Calistoga to bring programs to this underserved community
- Youth development for teens is expensive—programs need to pay experienced staff who'll stay around for the long haul, so there is consistent mentoring that builds kids' trust

### *What's Next*

- Attracting a broader base of donors to support the Fund
- Ongoing evaluation of Calistoga's needs against the Fund's focus areas
- Continuing to monitor grantees' progress

<sup>^</sup> For every \$1 contributed to the Fund by a donor, how many dollars have been distributed from the Fund? This is the ratio, in dollars, of 1: [(Total Grants from Fund) / (Average Contribution to Fund)].

# NAPA VALLEY

## COMMUNITY FOUNDATION



Mission: To help strengthen the organizational capacity of nonprofit organizations working in Napa County.

- Inception Date: May 2006
- Total Grants: \$45,000
- 2007 Grants: \$25,000
- Number of Donors: 8
- Donor Buying Power: \$1 = \$4<sup>^</sup>

### *What's Happening*

- Investing in programs that
  - Support nonprofits to increase fundraising capacity
  - Provide professional development to nonprofit leadership
  - Help nonprofits conduct business more efficiently and effectively
- We pool our resources with Auction Napa Valley and Gasser Foundation, then review and decide on grants together. In 2007, our collective grants totaled \$75,000, and 17 projects were awarded, including
  - Fundraising planning and consulting for a small nonprofit that helps victims of sexual assault
  - Strategic planning for an agency that provides childcare services to low-income and working poor families
  - Phone system for a nonprofit that provides residential and day-use programs for cognitively disabled adults
  - Board development for an up Valley afterschool program

### *What We're Learning (+ and -)*

- In the last year, there's been executive director turnover at six large nonprofits, and several more will announce retirement in the next few years. Many organizations need to focus on transition planning.
- Demand for these grants has consistently outstripped funds available, which tells us that funding for infrastructure continues to be very important, and that the simplicity of this Fund's application process is attractive to nonprofits.

### *What's Next*

- Attracting a broader base of donors to support the Fund — for 2008 four foundations will pool a total of \$200,000
- Ongoing evaluation of County-wide needs against the Fund's focus areas
- Continuing to monitor grantees' progress

<sup>^</sup> For every \$1 contributed to the Fund by a donor, how many dollars have been distributed from the Fund? This is the ratio, in dollars, of 1: [(Total Grants from Fund) / (Average Contribution to Fund)].

# NAPA VALLEY

## COMMUNITY FOUNDATION



IN SCHOOL &  
OUT OF SCHOOL FUND

Mission: To help children and youth (ages 3-24) succeed in school and improve their chances of becoming confident and contributing adults.

- Inception Date: January 2007
- Total Grants: \$75,000
- 2007 Grants: \$75,000
- Number of Donors: 11
- Donor Buying Power: \$1 = \$6<sup>^</sup>

### *What's Happening*

- Investing in programs that
  - Implement innovative education models designed to improve academic performance, and keep kids and parents engaged in learning
  - Develop leadership and college preparedness among middle and high school students
- Multi-year grant to transform classroom instruction at two low-performing elementary schools in Napa by integrating art into reading and math
  - Latino students' reading and math test scores have jumped five percent or more over prior years
  - Our grants have been a catalyst for others to invest another \$360,000
- Seed funding for a pilot project to create parity among Latino and Anglo teenage students, and build their resiliency
  - Kids who are on the edge of "at-risk" status are given intensive leadership and academic coaching
  - Students also have a service project that gets them working with younger kids, as well as adult community members

### *What We're Learning (+ and -)*

- New academic programs are more likely to get support from teachers if they are actively involved in the design and implementation
- Youth development for teens is expensive—programs need to pay experienced staff who'll stay around for the long haul
- Teens will engage if they trust the program staff, feel challenged, and are appreciated for their individuality

### *What's Next*

- Attracting a broader base of donors to support the Fund
- Ongoing evaluation of County-wide needs against the Fund's focus areas
- Continuing to monitor grantees' progress

<sup>^</sup> For every \$1 contributed to the Fund by a donor, how many dollars have been distributed from the Fund? This is the ratio, in dollars, of 1: [(Total Grants from Fund) / (Average Contribution to Fund)].

# NAPA VALLEY COMMUNITY FOUNDATION



Mission: To provide assistance to individuals and families affected by community-wide emergencies, such as floods or earthquakes.

- Inception Date: January 2006
- Total Grants: \$506,050
- 2007 Grants: \$21,200
- Number of Donors: 44
- Donor Buying Power: \$1 = \$39<sup>^</sup>

## *What's Happening*

- Investing in a consultant with expertise in emergency planning to
  - Convene local nonprofits active in emergency response/recovery
  - Improve planning and coordination among nonprofits, and with local government
  - Develop an inventory of nonprofit assets available for use during emergencies
- This planning grant has produced positive results
  - Clear definition of roles to be played by nonprofits during emergencies
  - New standing committee within Coalition of Nonprofit Agencies that is responsible for keeping above roles/responsibilities up-to-date

## *What We're Learning (+ and -)*

- Napa's emergency response and recovery agencies are thinly staffed and undercapitalized
- Reliance on informal processes and relationships to get things done in an emergency is risky, especially as leadership changes
  - in the last year alone, three nonprofit ED's who were active in the New Year's Flood have left their jobs
  - another is poised to do so soon
- Developing a more formal plan/process should help nonprofits continue to deliver heroic levels of service, with less redundancy, from small staffs

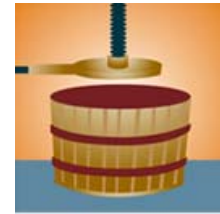
## *What's Next*

- Discussions with other grantmakers such as United Way about roles and responsibilities of funders when next emergency takes place

<sup>^</sup> For every \$1 contributed to the Fund by a donor, how many dollars have been distributed from the Fund? This is the ratio, in dollars, of 1: [(Total Grants from Fund) / (Average Contribution to Fund)].

# NAPA VALLEY

## COMMUNITY FOUNDATION



FUND FOR  
ST. HELENA

Mission: To provide more resources to nonprofit programs in St. Helena and surrounding communities of Angwin, Berryessa, Chiles Valley, Oakville, Pope Valley and Rutherford.

- Inception Date: July 2005
- Total Grants: \$85,500
- 2007 Grants: \$51,500
- Number of Donors: 8
- Donor Buying Power: \$1 = \$6<sup>^</sup>

### *What's Happening*

- Investing in programs that
  - Give area youths, ages 14-24, opportunities to develop themselves as students and as leaders
  - Expose teens and young adults in the St. Helena region to the broader world of career and citizenship
  - Provide avenues for kids to get their voices heard and participate in their local communities
- We provided funding in 2007 for nine projects, including
  - Mobile art trailer that offers classes and studio time to youths in the St. Helena region
  - Workshops and support groups for at-risk kids and their parents
  - Various teen-designed and teen-led programs, such as band and movie nights, ultimate Frisbee competitions, and open mic events

### *What We're Learning (+ and -)*

- The “underground” of teens and young adults in the area, who don't participate in school-based extracurricular activities, crave projects that connect them to their community and make them more visible
- Our grants have encouraged nonprofits from outside St. Helena to bring programs to this community
- Youth development for teens is expensive—programs need to pay experienced staff who'll stay around for the long haul, so there is consistent mentoring that builds kids' trust

### *What's Next*

- Attracting a broader base of donors to support the Fund
- Ongoing evaluation of the region's needs against the Fund's focus areas
- Continuing to monitor grantees' progress

<sup>^</sup> For every \$1 contributed to the Fund by a donor, how many dollars have been distributed from the Fund? This is the ratio, in dollars, of 1: [(Total Grants from Fund) / (Average Contribution to Fund)].

# NAPA VALLEY

## COMMUNITY FOUNDATION



Mission: To help our County's residents get their basic needs met and engage them in community life.

- Inception Date: January 2007
- Total Grants: \$72,500
- 2007 Grants: \$72,500
- Number of Donors: 4
- Donor Buying Power: \$1 = \$2<sup>^</sup>

### *What's Happening*

- Investing in Napa County programs that
  - Increase financial stability among low-income families
  - Connect vulnerable populations to essential services
  - Foster community dialog and inter-cultural awareness
- 1,700 youth, ages 3-21, who are children of migrant farmworkers, received dental screenings, oral hygiene education and urgent treatment
- Funded a first-ever community-organized *Día de Los Muertos* celebration in St. Helena
- Multi-year grant to help 700-plus working poor families build savings, and receive income-tax assistance and financial management education
- Matching grant for a bilingual/bicultural outreach worker to connect Latino elderly and their families to health and social services

### *What We're Learning (+ and -)*

- Projects that get cross-sections of local residents actively involved in planning and implementation can help bridge divides that exist within our community
- Nonprofits need unrestricted funding to collaborate with their peers, which is key to cost-effectively serving hard-to-reach populations
- Some of the core nonprofit providers of support services to low-income residents operate with razor-thin amounts of working capital

### *What's Next*

- Attracting a broader base of donors to support the Fund
- Ongoing evaluation of County-wide needs against the Fund's focus areas
- Continuing to monitor grantees' progress

**Please note: The Strong Communities Fund was formerly called "the Children Youth & Families Fund."**

<sup>^</sup> For every \$1 contributed to the Fund by a donor, how many dollars have been distributed from the Fund? This is the ratio, in dollars, of 1: [(Total Grants from Fund) / (Average Contribution to Fund)].