



Napa
Valley
Community
FOUNDATION
Annual Report



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A Letter from our President & Chair

This past year was our 29th year of operation, and like a young adult on the cusp of a milestone birthday, we've taken this opportunity to reflect on our history while looking optimistically towards the future.

In doing so, three themes have emerged related to giving, planning, and growth.

Giving is hyperlocal. Grants from the Foundation topped \$11 million this year, with a remarkable 87 percent of all distributions going to support programs right here in Napa County. Hundreds of donors and fundholders stepped up to make all of this possible, their collective generosity propelling community-wide prosperity, resilience, and wellbeing.

Planning is paramount. We've started the important work of updating the Foundation's strategic plan to meet our vision of a thriving, inclusive, and equitable Napa Valley.

Fans of our current areas of focus, fear not! We will continue to do the work described herein while launching new initiatives under some of these areas next year.

Growth is compounding. Our total assets have nearly doubled in the last five years, and half of the grants we've made in our history have been distributed in this timeframe.

Importantly, staff headcount has grown by just 11 percent in this period, a testament to economies of scale and careful stewardship of the monies entrusted to us by the community.

Thank you again for your partnership, generosity, and trust.

Terence Mulligan
President & CEO

Dawnine Dyer
Board Chair

Meet the Moment

We believe that **disasters**
don't discriminate, but
recovery does.





After the Glass Fire: Back Home with Wanda Hudspeth

When Wanda Hudspeth lost her Pope Valley home in the 2020 LNU Complex Fire, she didn't know how she'd be able to recover.

A master gardener living in a small home that had been in her family since the 1950s, Wanda had few financial resources, but endless faith in people.

She turned to UpValley Family Centers, Napa Valley Community Organizations Active in Disaster (COAD), and Catholic Charities of the Diocese of Santa Rosa for help, and was connected to disaster case managers who guided Wanda through the recovery and rebuilding process.

Napa Valley Community Foundation, through our Disaster Relief Fund, was able to provide the financial assistance Wanda needed to cover the gap between her insurance and the enormous costs of cleanup and construction.

This October, Wanda is back home, with a new one-bedroom house, a new canine friend, and a huge amount of gratitude.

"I can't get over the feeling of just being so fortunate, and grateful for the goodness of people," shares Wanda. "There's so many people to thank."

[Learn more about our disaster recovery work: napavalleycf.org/disaster](https://napavalleycf.org/disaster)



Meet our Donors: Dann and Susan Boeschen

When Dann and Susan Boeschen moved to St. Helena in 1999 from their home in Issaquah, Washington, they planned to retire.

“We really flunked retirement big time,” shares Susan. A few years into their idyllic Napa lifestyle, they went from dreams of planting a rose garden to building a winery — eventually opening Boeschen Vineyards.

Today, Dann is feeling “more and more retired every day.” And they love spending time with their children and five grandchildren.

Working in Napa Valley exposed Susan and Dann to a community they hadn’t deeply connected with during their early retirement days. “We loved it initially. But in the first couple of years, we were retired, and without any regular interactions with the community,” says Dann. “It felt a little

shallow, and it was much more engaging when we got hooked up with the working world around us.”

Dann and Susan have been passionate about philanthropy and speak humbly about their impact.

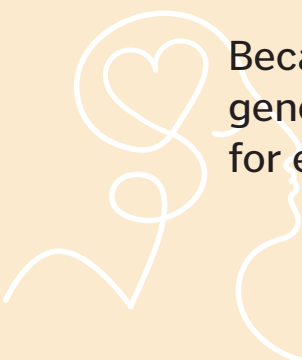
They believe in paying it forward. “Somehow, it rings a little better to me than ‘giving back’ to the community,” adds Dann. “The notion is great, but paying it forward feels a little better.”

One way they pay it forward is by giving to NVCF. “We make a practice of giving to the Community Foundation annually,” shares Susan. “One simple way is to assign our annual distribution from our IRAs, either for a specific need, or unrestricted, and let the professionals run with it.”

Napa Valley Community Foundation works side-by-side with local donors and nonprofits to tackle the most important challenges our Valley faces.

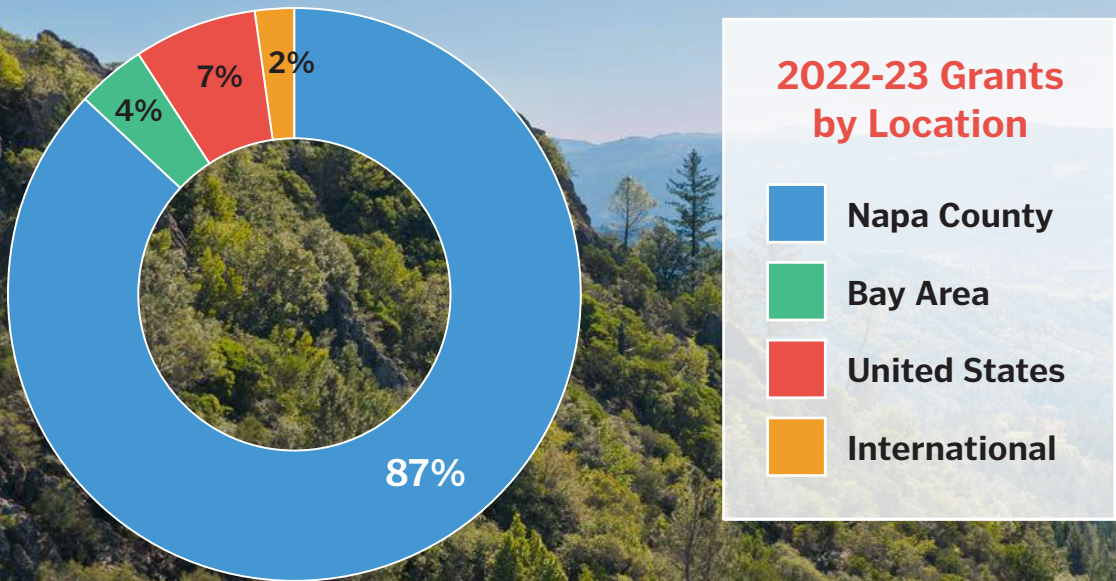
We believe that a prosperous community rises from a strong foundation. Every day we gather generous hearts and bright minds to solve the problems that lie beneath the surface of this beautiful place we call home.

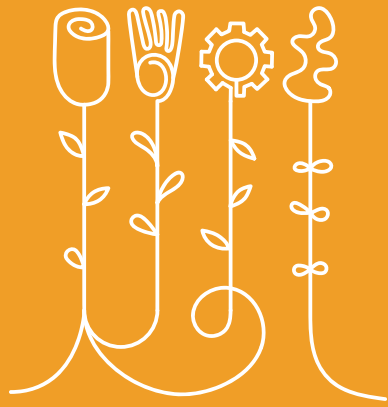
Because when we harness the power of our collective generosity, we become a force for good – making life better for everyone in the Valley.



We Napa Valley

87% of our grants last year (\$9.7M) went to organizations working right here in Napa Valley.





Fight Poverty

We believe that our Valley is only as strong as its most vulnerable residents.

Unfortunately, significant barriers—like the high cost of housing—stand in the way of local families' ability to thrive.



A Beacon of Hope in the Housing Crisis

Napa Sonoma ADU Center exemplifies our entrepreneurial approach to bringing new solutions to local challenges. We launched the ADU Center in 2020, with co-funding from Community Foundation Sonoma County. Today, under the leadership of director Scott Johnson, the ADU Center has helped guide more than 500 local residents aiming to build Accessory Dwelling Units (ADUs). It's working: an estimated 74 ADUs have been built, and hundreds more are in the pipeline.

ADUs are typically more affordable and faster to build by design, and they offer homeowners a way to contribute to solving the housing crisis in a personal way.

For Rick and Lacey Boatman, being able to build an ADU on their Napa property was the difference between staying local or moving out of Napa County.

Rick, a firefighter, and his wife Lacey, who works at the Napa County Office of Education, have two young children, and they needed a way for Rick's aging mother to live close to their family.

"The whole point was to build it for her, she was losing her housing," shares Rick. "We'd have had to look at moving away if we couldn't have built here."

Learn more about the ADU Center:
napasonomaadu.org

Photos: Rick and Lacey Boatman's newly built ADU. Scott Johnson, Director of Napa Sonoma ADU Center.



2022-23 Financial Summary*

\$72,958,000

TOTAL
ASSETS

\$12,492,000

TOTAL
CONTRIBUTIONS

\$11,057,000

TOTAL
GRANTS AND SCHOLARSHIPS

*Financial summary and investment performance are for the fiscal year July 1, 2022-June 30, 2023; unaudited.

Investment Performance

	YTD	1 Year	3 Year	5 Year
LONG-TERM				
Portfolio	10.46%	12.11%	8.84%	6.72%
Benchmark	10.97%	12.16%	7.25%	6.27%
INTERMEDIATE-TERM				
Portfolio	6.87%	9.13%	4.33%	4.95%
Benchmark	6.83%	6.05%	2.02%	3.70%
SHORT-TERM				
Portfolio	2.20%	3.47%	1.21%	1.49%
Benchmark (U.S. T-Bill)	2.34%	3.74%	1.32%	1.54%

Photos: A young person playing guitar at American Canyon Pride 2023 (above). Victor Chen is the first recipient of NVCF's Dave Smith Scholarship Fund (right).

2022-23 Grants and Scholarships

\$11,057,000

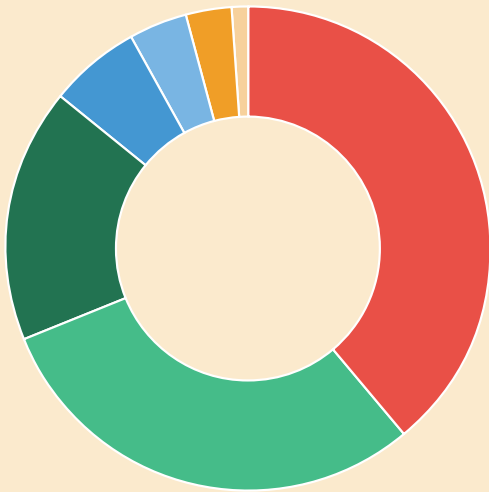
TOTAL GRANTS &
SCHOLARSHIPS

648

NUMBER OF
GRANTS &
SCHOLARSHIPS

273

NONPROFIT
ORGANIZATIONS
& SCHOOLS



Grants by Impact Area

- 39% Health & Human Services, \$4.3M
- 30% Arts, Culture & Humanities, \$3.3M
- 17% Education & Scholarships, \$1.9M
- 6% Disaster Relief, \$685K
- 4% Animal Welfare, \$366K
- 3% Other, \$317K
- 1% Environment, \$132K

Scholarships

78 STUDENTS

84% FIRST GENERATION
COLLEGE STUDENTS

28 COLLEGES &
UNIVERSITIES

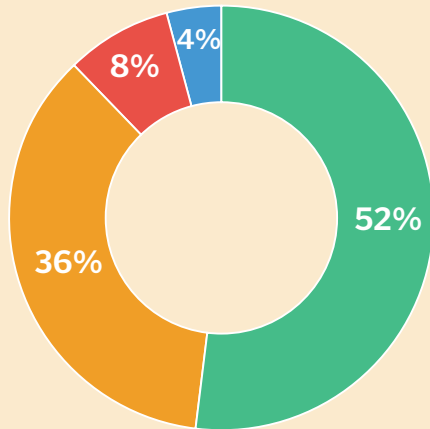
Stanford
Class of 2027

Our Legacy Grants

Increasingly, our annual distributions are made possible by generous people who create a Legacy Fund at the Foundation through their estate plans.

\$645,000

2022-23
LEGACY GRANTS



Legacy Grants by Impact Area

- Animal Welfare
- Education & Scholarships
- Health & Human Services
- Environment

Here for good, forever.

The Foundation is a sturdy vessel into which other people can pour their hopes for the future.



Leaving a Legacy: Elaine Honig

When Elaine Honig turned 50, she realized she was, someday — hopefully long in the future — going to die.

“I started really thinking about what this all means. I’m just on this planet for this brief time,” says Elaine. “I’ve worked hard. I’ve been a good saver. Thinking about my resources going to something meaningful, that could make a difference for other people, it removed a lot of my anxiety.”

Elaine knew she wanted to leave a lasting legacy, and the path became clearer when she discovered NVCF. With our guidance, she defined her personal values and identified the causes that resonated deeply with her. Together, we documented her wishes in a flexible planned gift agreement that can evolve as her priorities do.

Elaine’s dedication to service wasn’t born in a vacuum. Her mother modeled a commitment to service that has stuck with her to this day. “I remember calling in college being sad about something, and she said, ‘Elaine, you just need to get out there and go volunteer. Get outside yourself.’”

This counsel had a lasting impact. Elaine started a business to support nonprofit fundraising, helping raise over \$125 million.

Her commitment to service isn’t limited to her professional life. Elaine has opened her home to over 50 foster dogs throughout the years. She sums up her philosophy with conviction: “I don’t want to just live on the planet to entertain myself. We all have a responsibility. We’re all part of a bigger whole, and the world needs our help.”

Champion Community

We believe that our community and our democracy are more vibrant when everyone participates in the decisions we make about our future.

But all too often, certain segments of our population face obstacles to civic engagement—like the lack of affordable legal services to obtain citizenship, or the dearth of local journalism.





One Napa Valley, Many Stories: Championing Citizenship

Over a decade ago, we launched the One Napa Valley Initiative (ONVI) with a vision to cultivate citizenship and strengthen our community. With an investment of over \$3 million, our nonprofit partners have achieved remarkable milestones:

- **2,300** individuals have been granted U.S. citizenship.
- **1,000** Valley residents have pursued ESL classes focused on civics & citizenship.
- **485** volunteers have dedicated over 13,000 hours to naturalization workshops, ESL classes, and citizenship exam prep.

“A lot of people don’t realize that the pathway to citizenship is really hard,” says Mady Hernandez, an attorney at Immigration

Institute of the Bay Area (IIBA), one of our ONVI partners. “The law is extremely complex, legal service costs can be high, and people really need a lot of support with the English and civics requirement. The Foundation has enabled us to provide high-quality, low- or no-cost immigration legal services to hundreds of immigrants in Napa County every year.”

Our 2012 study showed that immigrants make up 23% of Napa’s population and 33% of our workforce. Their invaluable contributions drive Napa’s growth and vitality. We are honored to champion their pursuit of citizenship.

Learn more about One Napa Valley Initiative: napavalleycf.org/onvi

Photo: New citizens celebrate their milestone at a Board of Supervisors meeting in November 2016.



Meet our Donors: Larry Turley and Suzanne Chambers

Suzanne Chambers and Larry Turley first met at the Kapalua Wine & Food Festival in Maui more than 30 years ago. They discovered a shared passion for wine and helping others, a commitment they continue to embrace today.

“My parents were teachers, and Suzanne’s parents understood the value of education. It’s hard to do well in school when you are hungry or don’t have a place to study,” shares Larry. “We continue to help those that need a hand in our community and beyond, as others have helped us. Turley Wine Cellars and Suzanne’s business, Chambers & Chambers, enable us to do this.”

With a commitment to helping critical issues like education and food security, Larry and Suzanne began working with

Napa Valley Community Foundation more than 15 years ago by establishing a Donor Advised Fund. Today, they’re excited to have their four daughters, all young adults, become more involved with giving back and are glad to be in a position to do so in partnership with NVCF.

“We appreciate the Foundation because they’re really in tune with what’s going on in Napa. They know the community inside and out, and they’re great at figuring out where help is needed most. It’s been a terrific way for us to give back, and it’s been a real pleasure to see our kids get involved, too. We’re happy to be part of something bigger than ourselves here in Napa, and we hope others might be inspired to do more, too.”

We're deeply committed to understanding the needs of our community and guiding our donors accordingly.

Our team conducts site visits with over 200 nonprofit organizations annually, ensuring we're well-informed about the ongoing work and challenges in our community.

Fundholders benefit from our intimate knowledge of the Valley's organizations; last year, this led to nearly **\$1.9M in grants** based on recommendations from our staff.

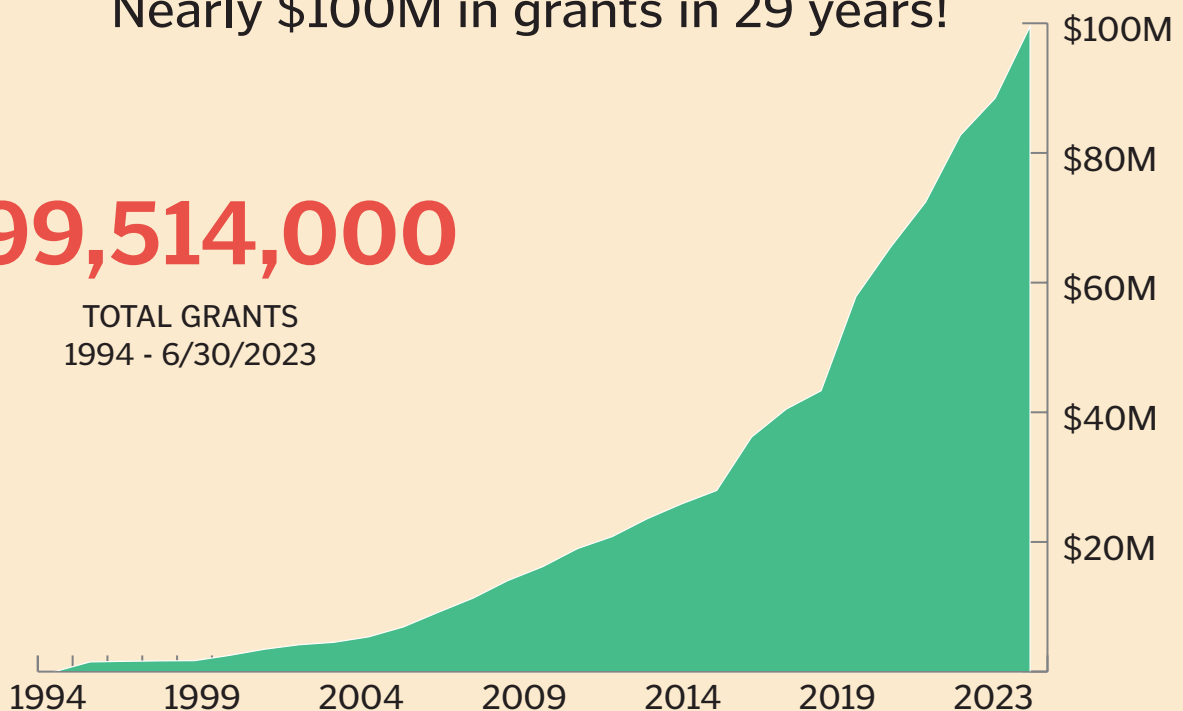


We ♥ Our Donors

Nearly \$100M in grants in 29 years!

\$99,514,000

TOTAL GRANTS
1994 - 6/30/2023





Invest in Youth

We believe that **all** young people have the potential to become **confident** and **contributing adults**.

However, while gifts and talents are evenly distributed, **access** and **opportunities** are not.



Grant Spotlight: AVID

Mariela Rivera's college dreams were first ignited in eighth grade by her teacher, Mr. Norris, who encouraged Mariela to join the college preparatory class AVID (Advancement Via Individual Determination).

"My parents hadn't gone to college, and I thought that after high school, I was done with school. Mr. Norris told me AVID would expand my view on higher education, and in my first year, I was surprised to see so many colleges out there."

Both Napa Valley and Calistoga's Unified School Districts have incorporated AVID programming at many grade levels. While program costs are largely covered by district resources, grants from NVCF have provided invaluable funding to train school

staff in AVID practices and underwrite college campus visits for students.

"It enables kids to have an immersive experience, stay in the dorms, and feel what it's like to be a student at a university. It's huge," says Sarah Knox of NVUSD.

The program's impacts are remarkable. In NVUSD schools, AVID students had higher attendance records, and 95% applied for and were accepted into a 2- or 4-year college. In Calistoga, college-bound students had their pick of schools with 50 UC and 105 CSU acceptances for 23 seniors.

When her acceptance emails started rolling in, Mariela was overjoyed. "I was so excited when I found out I got into all of my CSU choices."

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FOUNDATION

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