

Napa Valley Community FOUNDATION



Annual Report

2023-2024

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A Letter from our President & Chair

Thirty years ago, a Sony Discman qualified as a technological marvel.

The Lion King was raking it in at the box office – decades before we would think to use the words “stream” and “media” in the same sentence.

Meanwhile, here in Napa, a group of civic leaders had the wisdom and the vision to ask: why doesn’t Napa Valley have a community foundation, and what would it take to start one?

This long-ago question not only led to our formation in 1994, but to nearly **\$106 million in grant distributions and scholarships** over the past three decades.

As we watch the Foundation’s odometer roll over to the big three-zero, we are filled with gratitude for our two most important constituents: our donors and our nonprofit partners.

To our donors: Your generosity and compassion propel the work of the Foundation. There is no alternate fuel source for us; no substitute for your moral and financial support; no other means by which we are able to build a more vibrant, successful, and cohesive community.

To our nonprofit partners: We have the privilege of working with you during declared disasters and during the countless undeclared moments that constitute everyday life. Time and again, we see you step up to help our neighbors in need. We are proud to support your life-changing work.

To our community: Thank you! We are dazzled by your love of this Valley and its residents.

Here’s to our next thirty years together...

Terence Mulligan
President & CEO

Manbin Khaira Monteverdi
Board Chair

A Defining Moment

In the fall of 1994, a group of community leaders gathered at ZD Wines to discuss forming a community foundation for Napa Valley. “We were limited to 70 people in the room, and we overflowed it,” shares Nicky Suard, a founding board member. “I had placed one notice in the newspaper and spoken to the Rotary and Kiwanis Clubs. The turnout was a great surprise.”

Soon afterward, we filed for incorporation, and in 1995, our first Donor Advised Fund was created.

Just three years later, a couple established our first million-dollar fund. By then, we had moved into a one-room office with a skylight, but no windows.

We’ve come a long way since those early days. Today, we manage more than 150 active funds and have awarded nearly \$106 million in grants. And now, we have a building to call our own.

Our donors — past and present — continue to make a difference. For such a small geographic area, we have so many big hearts.

Photo originally published in our *Report to the Community*, 2000.

Standing, left to right: Patricia Struntz, Dan Corsello, Bill Phelps, Judy Barrett, Charlie Johnston, Mary Rocca, David Hines, Tom Young. Seated, left to right: Nicky Suard, Carlee Leftwich

The story begins

ONCE UPON A TIME IN THE NAPA VALLEY





Meet our First Fundholder: Preston Greene

In 1995, after reading a story about our emerging Foundation in *The Napa Valley Register*, Preston Greene became the first donor to open a fund at NVCF.

When Preston first encountered the idea of a community foundation, it was entirely new to him. “In Virginia, I’d never heard of a community foundation,” he shares. “There was an article about it, and I said, ‘Oh, what a wonderful idea. I love it.’” Preston decided to reach out, and after a fruitful conversation with Nicky Suard – one of our founding board members – he made his first contribution. “I said, ‘I’ll give you some money, and then you nice people decide what to do with it, to demonstrate your utility to the community.’”

His decision to donate to the Foundation came from a genuine desire to see NVCF

thrive. “I got the impression it was new and had expenses without income. I decided to donate enough money to keep it going until others started putting into it,” he recalls.

Over the years, Preston has become a passionate advocate for animals, children, and providing opportunities for the Latino community in Napa. His Donor Advised Fund, aptly named the Opportunity Fund, reflects his vision of creating chances for growth and development, and his commitment to taking chances on funding initiatives he believes have value.

Preston enjoys the flexibility we offer. “The way the Community Foundation works, you can make a charitable contribution to your fund when you have the money or need the tax break, and then wait for opportunities. I think that’s absolutely great.”



A DEFINING MOMENT

A group of civic leaders gather at ZD Wines to discuss forming a community foundation for Napa Valley.



1ST SCHOLARSHIP FUND OPENS

Judith B. Cutcomb Scholarship supports St. Helena teachers and students.

30 YEARS OF
IMPACT»»

1994

Foundation marks new era in fund raising

1997

COMMUNITY FOUNDATION OF THE NAPA VALLEY

1995

1998



FIRST GRANTS TO THE COMMUNITY

One of our first donors Preston Greene makes inaugural grants totaling \$24,500.

FIRST WEBSITE

The Foundation enters the tech world with launch of cfnv.org.



Archival news articles 1995-2011:
The Napa Valley Register and
The Weekly Calistogan



CHAMPION COMMUNITY

NVCF releases ground-breaking immigration study, launches One Napa Valley citizenship initiative.



MEET THE MOMENT

NVCF reactivates disaster fund to help the Valley recover from devastating wildfires.

2012

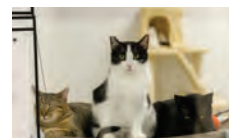
2014

2017



THE NAPA EARTHQUAKE

NVCF activates disaster relief fund after the Napa earthquake with \$10M lead gift from Napa Valley Vintners.



CARING FOR ANIMALS

David and Jane Gotelli's legacy gift launches the Gotelli Family Fund, now a cornerstone for supporting small animal welfare in Napa County.



A GRANTMAKING MILESTONE

\$1,000,000
cumulative grants
from 1994-2000.



CITY FUNDS

LOCAL GIVING

NVCF launches City
Funds for grant-
making in American
Canyon, Calistoga,
and St. Helena.

FIGHT POVERTY

NVCF helps thousands
of families avoid
foreclosure during the
financial crisis.

2000

2008-11

2005-06



NEW INITIATIVES

An anonymous donor
seeds launch of
CyberMill for youth
learning software &
computer skills.

FIRST LARGE-SCALE DISASTER RESPONSE

The Foundation steps up to
respond to the Napa flood.



A NEW LOOK

The Foundation rebrands,
changes name putting
Napa Valley first.

NAPA VALLEY
COMMUNITY FOUNDATION

FIGHT POVERTY

NVCF launches Napa
Sonoma ADU Center
to spur workforce
housing development.



INVEST IN YOUTH

NVCF distributes
\$2.5 million in
scholarships
1994-2024.



2019

2020

2024

TOTAL
GRANTS
1994-2024
\$106M

UPGRADES & RENOVATIONS

NVCF opens new
coworking space for
nonprofit agencies,
rebrands with new
signature color.

Napa
Valley
Community
FOUNDATION



CHAMPION COMMUNITY

2,500 U.S. citizens
naturalize through
One Napa Valley
Initiative from 2012-
2024.

2023-24 Financial Summary*

\$83,700,000

TOTAL ASSETS

\$11,439,000

TOTAL CONTRIBUTIONS

*Financial summary and investment performance are for the fiscal year July 1, 2023-June 30, 2024; audited.

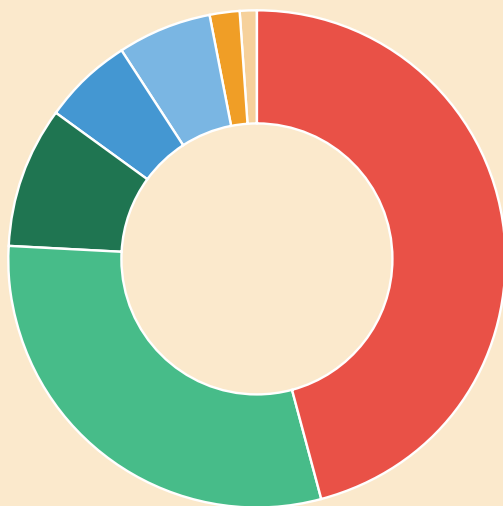


\$6,146,000

TOTAL GRANTS AND SCHOLARSHIPS

668
NUMBER OF
GRANTS & SCHOLARSHIPS

272
NONPROFIT ORGANIZATIONS
& SCHOOLS



Grants by Impact Area

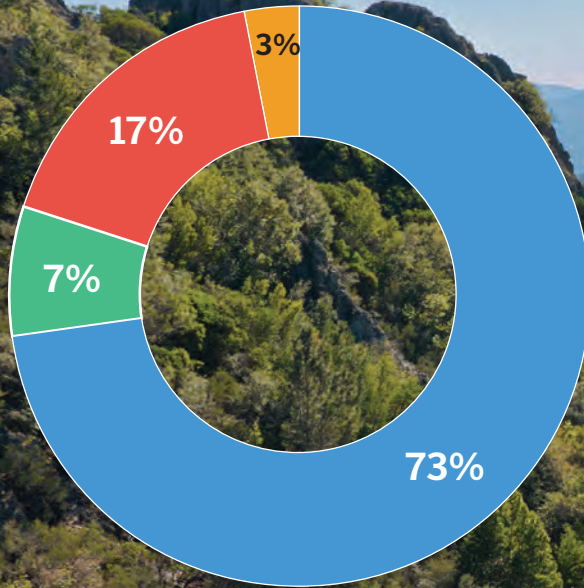
46%	Health & Human Services, \$2.8M
30%	Education & Scholarships, \$1.89M
9%	Disaster Relief, \$537K
6%	Arts, Culture & Humanities, \$372K
6%	Animal Welfare, \$367K
2%	Other, \$94K
1%	Environment, \$86K

Investment Performance

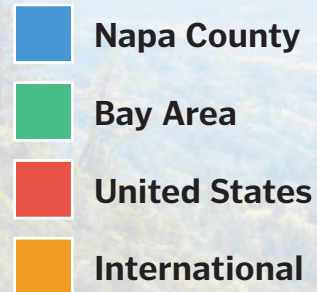
	YTD	1 Year	3 Year	5 Year
LONG-TERM				
Portfolio	8.22%	15.51%	3.86%	8.65%
Benchmark	8.08%	14.78%	3.43%	7.89%
INTERMEDIATE-TERM				
Portfolio	4.67%	10.57%	2.57%	5.91%
Benchmark	4.02%	9.15%	0.47%	4.18%
SHORT-TERM				
Portfolio	2.32%	5.11%	2.83%	2.09%
Benchmark (U.S. T-Bill)	2.67%	5.45%	3.10%	2.16%

We ❤️ Napa Valley

73% of our grants last year (\$4.6M) went to organizations working right here in Napa Valley.



2023-24 Grants by Location

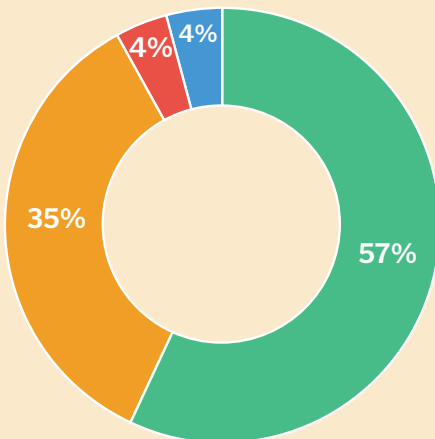


Our Legacy Grants

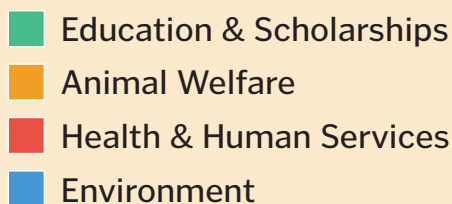
Increasingly, our annual distributions are made possible by generous people who create a Legacy Fund at the Foundation through their estate plans.

\$691K

2023-24
LEGACY GRANTS



Legacy Grants by Impact Area





Leaving a Legacy: Jack and Loraine Stuart

When Loraine and Jack Stuart moved to Napa Valley in the late 1970s, they planted roots for their family and their new community—all driven by a passion for making Napa Valley a better place.

Jack has served in board roles at Napa Valley Vintners, the Land Trust of Napa County, and recently the St. Helena Public Library. Loraine held the post of Executive Director for Arts Council Napa Valley in the 1990s, spent nearly a decade on the board of UpValley Family Centers, and joined NVCF's board in 2013. "I have spent most of my career in the Valley, paid or unpaid, in nonprofits," Loraine shares. "It's been a great run."

Loraine was NVCF's board chair during a challenging period—the early days of the

COVID-19 pandemic and the 2020 wildfires.

Giving back for the Stuarts has always been about supporting initiatives that create long-term change. Issues close to their hearts include housing and the environment. "Housing has forever been on my list," Loraine notes, "from farmworker housing to workforce housing—we need places people who work in our community can afford to live."

Their dedication extends to their estate plan, which includes a bequest to NVCF. "We're not big capacity donors, and we never will be, but we have a plan in our estate that is tiered, allowing something for the Foundation to manage on behalf of the community," Loraine explains.



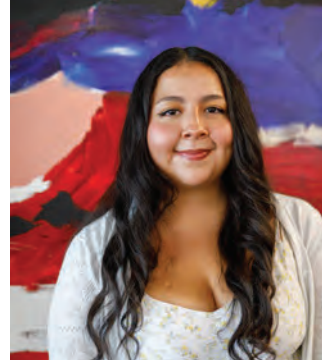
2023-24 Scholarships

112 STUDENTS

77% FIRST GENERATION COLLEGE STUDENTS

36 COLLEGES & UNIVERSITIES





I WONDER IF I WILL MISS THE MOSS

by Jane Mead

I wonder if I will miss the moss
after I fly off as much as I miss it now
just thinking about leaving.

There were stones of many colors.
There were sticks holding both
lichen and moss.
There were red gates with old
hand-forged hardware.
There were fields of dry grass
smelling of first rain
then of new mud. There was mud,
and there was the walking,
all the beautiful walking,
and it alone filled me—
the smells, the scratchy grass heads.
All the sleeping under bushes,
once waking to vultures above, peering down
with their bent heads the way they do,
caricatures of interest and curiosity.
Once too a lizard.
Once too a kangaroo rat.
Once too a rat.
They did not say I belonged to them,
but I did.

Whenever the experiment on and of
my life begins to draw to a close
I'll go back to the place that held me
and be held. It's O.K. I think
I did what I could. I think
I sang some, I think I held my hand out.



In loving honor of poet Jane Mead (1958-2019).
Originally printed in *The New Yorker*, September 20, 2021
Images by Shelly Euser, 2022. Printed by Sara T. Sauers.

[Learn more about Jane at janewmead.com](http://janewmead.com)



Photo by Parry Mead Murray

Leaving a Legacy: Jane Mead

Jane Mead's deep connection to Napa continues through her generous legacy gift to NVCF. Her bequest established the Fund for Napa Valley, which will make grants to the community she loved for years to come.

Jane, a poet, teacher, author, and rancher, passed away in 2019. We spoke with her sister, Parry Mead Murray, who shared that their family grew up splitting their time between New England and Napa, spending summers at Mead Ranch which had been in the family for five generations. After Parry's long tenure managing the ranch, Jane took over for another 15 years, balancing vineyard work with her writing. Her time on the ranch profoundly influenced her poetry.

Jane left a significant part of her estate to NVCF. "She would be pleased with however the Foundation decides to disperse the funds," Parry reflects. "She always wanted to enrich the community, especially those who are less advantaged."

Jane's legacy gift reflects her lifetime spent caring for people, animals, and the environment. In addition to her bequest to NVCF, she left Mead Ranch to the Land Trust of Napa County—a legacy they had long envisioned. She, Parry and their father, Giles, began discussing this idea in the early 1990s, when they collectively placed a conservation easement on the property to permanently protect its natural habitat.

Jane was a dedicated poet and teacher, inspiring others to find their voice. She taught at Napa Valley College, Colby College, the Iowa Writer's Workshop, and served as poet-in-residence at Wake Forest University.

Her generous spirit and dedication to her craft are well-known. Over Jane's career, she published six books, received numerous awards, including a Guggenheim Foundation Fellowship, and appeared in renowned publications such as *The New Yorker*, *The New York Times* and *Poetry Magazine*.



Meet the Moment

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





Grants Spotlight: Long-Term Disaster Recovery

In the wake of the devastating wildfires in 2017 and 2020, UpValley Family Centers (UVFC) has been a lifeline for many in our community, thanks to grants from NVCF.

The 2020 fires took place during the COVID-19 pandemic, creating unique challenges. “Many of our clients in 2020 had no insurance and were on fixed incomes, making recovery even harder,” Susana Garcia-Sanchez, UVFC Disaster Case Manager, shares. “But with NVCF’s support, we could help stabilize their lives.”

Staff had to meet clients where they were. “We might focus on housing, while our client is more worried about needing a car to get to work. He’s not thinking ‘I need a place to stay’. He’s thinking, ‘I need to buy a car because that’s going to provide me income,’” shares Susana.

Beyond financial aid, UVFC helps connect clients with other services, like mental health, legal services, and access to food. Tania Lopez, Program Manager, emphasizes, “That [support] made all the difference for families. Some folks had no means of paying their rent; we were able to keep them housed.”

One success was helping a small business owner who had lost everything in 2017. Through NVCF’s financial support, the client was able to rebuild her life and her business. “As we were going through the process [of replacing her modular home lost in the fires], she became pregnant,” Tania shares.

“Now we see their family in the community, they’re happily back in their home.”

Learn more about our disaster recovery work: napavalleycf.org/disaster

Photo (above): Tania Lopez, Susana Garcia-Sanchez, and Claudia Samuels served as Disaster Case Managers.



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: Community Resources for Children

Community Resources for Children's (CRC) Active Minds program fosters school readiness among two-to-three-year-olds, the majority of whom are from low-income homes and have no previous preschool experience.

The program teaches parents to guide their child's natural curiosity and learning, emphasizing the role parents play as their child's first and most important teachers.

Over the 8-week program, offered in English and Spanish, CRC's early learning specialists create a preschool-like setting for parents, caregivers and children. This immersive environment allows parents to practice skills that foster their child's development, which they can continue with take-home curriculum and activities.

A grant from NVCF supported two of the 8-week sessions CRC hosted last year. The results were impressive: 90% of parents and caregivers reported a deeper understanding of their child's learning needs and increased the frequency of reading to their children to at least twice a week—a strong predictor of future educational outcomes.

“Our goal is to provide families with the tools and confidence they need to support their children's growth,” shares Erika Lubensky, Executive Director of CRC. “By creating a nurturing and interactive environment, we're helping parents become active participants in their child's education, setting a foundation for lifelong learning.”

Learn more about how we invest in youth:
napavalleycf.org/youth





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.



Grant Spotlight: The ADU Center

For years, Todd and Gabrielle Kuchta knew they would need to create a space where their son Jacob, 26, could gain independence while still receiving the support he needs for his autism. “We’d talked about it for 10 years, even before Jacob graduated high school,” Todd says. “It wasn’t until last year that we finally moved forward.”

The couple found the guidance they needed through **The ADU Center**, a nonprofit founded by NVCF to help homeowners build accessory dwelling units (ADUs).

The Center encourages affordable housing by guiding homeowners through the complexities of building an ADU. “Even with my construction background it was helpful to have someone explain the process, the guidelines, and the fees,” Todd explains.

The Kuchtas utilized two of NVCF’s key partners in financing. NVCF and Redwood Credit Union are piloting an innovative ADU construction loan. Additionally, the County of Napa incentivizes affordable rentals through forgivable loans of up to \$105,000 for ADU construction, when the homeowners work with The ADU Center.

“It made a significant difference,” Todd notes. “Without it, we would have had to do the work ourselves. I’m 58 and I was not looking forward to doing that.”

Jacob’s ADU is a big step towards independence. “It’s been great for him,” Todd says. Jacob is becoming more self-sufficient, and having his own home has opened up new possibilities for support services and meaningful volunteer opportunities.

Learn more: aducenter.org



Photos: The Kuchtas in front of their ADU (left). A crane lifts ADU into place. Jacob’s new bedroom (above). Photos courtesy Villa Homes, Todd Kuchta.



Grant Spotlight: Preserving Local Journalism

Across the country, local journalism is in decline, leading to news deserts and reduced civic engagement, especially in semi-rural communities like Napa County.

In 2022, NVCF launched a **Media & Democracy Fund** to preserve and grow independent journalism in Napa County. One goal is to address inequities in the creation and distribution of information affecting our quality of life — on critical issues like housing, education, and healthcare.

One key investment NVCF made was to provide a three-year grant to hire a bilingual/bicultural reporter to tailor news to – and from – our Spanish-speaking residents. Since she was hired last year, Mariela Gomez has traversed the Valley writing content born from listening to the community.

NVCF also piloted a virtual “Pop-Up Journalism Collaborative Lab” to unite reporters across news outlets with the aim of expanding coverage on community-requested topics like youth mental health. Through the Lab, Napa County residents now receive critical information in both English and Spanish, connecting them to resources and one another through print, digital, and audio media across the Valley.

“I strive to amplify voices within the Valley, ensuring they’re not only heard but understood,” says Mariela. “I want to tell stories that break away from common narratives of suffering, pain, and immigration - often associated with the Latino experience. While these issues matter, the reality is so much more—it’s a vibrant tapestry of complexity, talent, creativity, and resilience.”

Photos: Stories published in The Calistoga Tribune, The Napa Valley Register (left). Mariela Gomez, bilingual reporter for Highway 29 (above).



Meet our Donors: Edward and Sara Kozel

When Ed and Sara Kozel moved to Calistoga in 2017, they noticed something missing—a place for the community to gather and celebrate the arts. Over the past five years, the Kozels have been anchor donors behind the effort to open the Brannan Center, a nonprofit performing arts venue and community meeting space in Calistoga.

The Kozels, who relocated to Calistoga after many years in Healdsburg, felt an immediate connection to its charm. “Calistoga is a working town. The diversity here is much greater,” says Ed. Sara adds, “The community is tight-knit and cares.”

They also felt that NVCF, with our local insight, was a natural partner for their giving, and established a Donor Advised Fund.

“It made sense to work with a local group that would have more awareness of the Valley and its needs,” explains Sara.

In 2019, they connected with other community members who shared their vision of transforming the historic Presbyterian Church into a multi-use venue. “We started as a working group in the backyard, became a nonprofit in 2020, and just kept going,” says Sara.

Driven by their passion for arts education, they hope the independent, community-governed Brannan Center will provide Calistoga’s youth and families a place to explore the arts. “This is significant,” says Ed. “The high school doesn’t have a performing arts theater, for example.”

Reflecting on their partnership with NVCF, Sara appreciates the Foundation’s personal touch and responsiveness. “I know that when I send a message to one person, that one person knows who I am,” she says. The Kozels appreciate how NVCF helps them support the causes they care about most.

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 **\$1.5M in grants** based on recommendations from our staff.

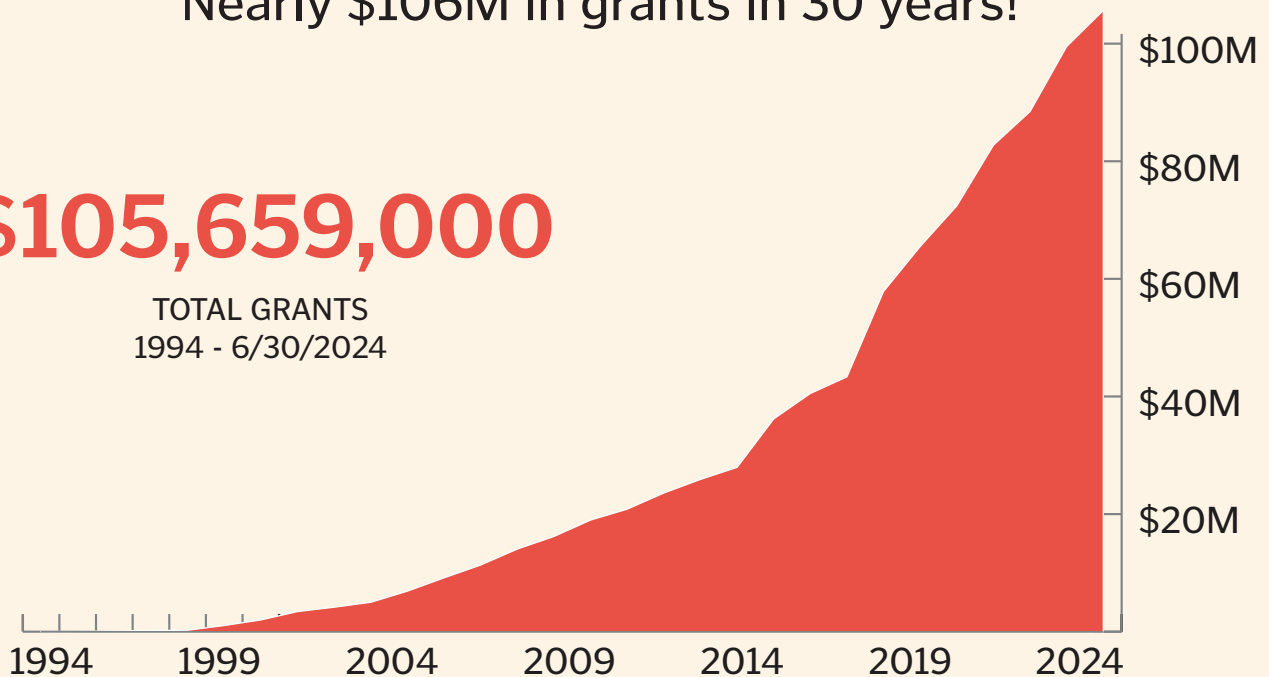


We ♥ Our Donors

Nearly \$106M in grants in 30 years!

\$105,659,000

TOTAL GRANTS
1994 - 6/30/2024



Thank you to the business and family donors who have made our 30th Anniversary one to remember



*Peggy
Rawls*

*Parie & Blair
Lambert*



Coombs & Dunlap, LLP
Serving the Napa Valley since 1876



*Launce & Joan
Gamble*

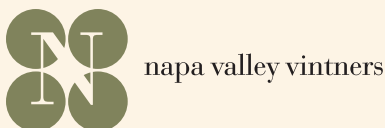


*Anne Carver &
Denis Sutro*



*Larry Turley &
Suzanne Chambers Turley*

*Mark and Mona
Couchman*





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