



## THE OREGON WINE BROTHERHOOD

### WHO WE ARE, WHAT WE DO, AND HOW WE DO IT

AS DETERMINED AT THE APRIL 20, 2024, STRATEGY MEETING

#### WHO WE ARE:

The Oregon Wine Brotherhood (OWB) was incorporated in 1996 as a tax-exempt organization under the agricultural and horticultural provisions of IRC Section 501(c)(5).

Over the years OWB has developed a **Mission Statement** and a **Core Purpose**. In April 2024, the Master Council refined and adopted the following:

The **Mission** of The Oregon Wine Brotherhood is to be an association of individuals, both within and independent of the wine industry, dedicated to promoting and supporting the wine industry of Oregon through education, scholarships, ceremony, community support, and fellowship. Our gatherings are designed to promote and celebrate the wines of our region and provide opportunities for our members to enjoy camaraderie both locally and internationally.

The **Core Purpose** of The Oregon Wine Brotherhood helps define the actions needed to fully support our Mission Statement. The things that we do as an organization should be in alignment with the Mission Statement and Core Purpose. The OWB has three main goals that defines its Core Purpose:

- The first is to promote and support the wines and wine industry of Oregon.
- Our second is a philanthropic goal of supporting: 1) the education of students seeking a degree or education in the creation of wine, 2) communities on which the wine industry depends, and 3) other wine related projects and programs.
- Lastly, it is to enjoy the history and pageantry of wine brotherhoods around the world and especially the companionship of our members through educational and social events.

We believe that all the activities of the OWB should be focused on the guidelines set up by our Bylaws, Mission Statement, and Core Purpose.

## WHAT WE DO:

We recognize the importance of philanthropic activities and also know that people belong to the OWB because of the joy of learning about wine, having fun interactions with good friends and being a part of an international organization (F.I.C.B.) that supports similar goals to the OWB. “What We Do” is also centered around the pleasure, recreation, and education related to the enjoyment of wine. OWB’s core activities that support our Core Purpose include (but are not limited to):

- Annual Commander’s Coffee where new members are formally introduced to the OWB.
- Annual Assemblage of Spring where we induct and welcome new members.
- Annual Barrel Tasting usually held at a winery or vineyard.
- Wine Tasting Groups
- The OWB Wine Master educational program (classes and winemaker dinners)
- Various country specific dinners organized by our OWB Ambassadors
- Availability for members to attend events of the F.I.C.B. (our international parent organization in France)
- Annual survey of wine industry participants to ascertain needs including talent and community support. The survey is conducted by Oregon State University and designed to inform our giving focus each year.

## HOW WE DO IT:

Members of the Master Council and Cadre lead and organize committees that make possible the various social and educational activities of the OWB. Our fully volunteer organization relies on and is generously supported by a majority of our members who give of their time, talent and professional experience in support of all the activities we offer. They are the core of “How We Do It.”

**OWB’s annual Barrel Tasting is the event that facilitates OWB’s giving programs.** At this event, which is held in the late summer or early fall, funds are raised through a **Paddle Raise** and a **Silent Auction**. Proceeds are used to support OWB’s philanthropic efforts and, to a lesser extent, the operations of the OWB. It is the only fundraiser of the year.

In 2022, the **OWB Charitable Giving Program** was set up to provide guidance to the Master Council for the disbursement of funds for our philanthropic efforts. Barrel Tasting **Paddle Raise** funds are directed by donors to either the **OWB Scholarship Fund** or the **OWB Community Fund**. All Paddle Raise dollars are assigned to one of these two funds.

**The OWB Scholarship Fund** is our scholarship program which was funded through the Oregon Community Foundation (OCF) in 1996. This fund is managed and controlled under the terms of the OCF fund agreement. Since then, member and guest donations have grown into an endowment fund of \$388,325 as of March 31, 2024. As per OCF guidelines, the fund generates approximately \$15,000 per year for student scholarships. Several years ago, the Master Council voted that donations made to OCF be added to currently available scholarships instead of being added to the endowment. However, if

a donor would like their donation to be added to the OCF endowment, they can direct OCF or the OWB Treasurer to do so. Using these two sources of revenue now allows us to make scholarships to students in the amount of approximately \$30,000 per year. The Scholarship Committee, supported by OCF and with final approval by the Master Council chooses the students and the amount each will receive. Paddle Raise dollars contributed to the OCF may be tax deductible for the donor.

**OWB Community Fund** (created in 2023) provides funding directly to local organizations, programs and internships that benefit employees of the Oregon wine industry. 2024 recipient organizations were ;Salud! and AHIVOY. Funds generated from the Paddle Raise, not directed to OCF, are allocated to the OWB Community Fund. The use of these funds is proposed by the OWB Community Fund Committee with final approval by the Master Council. Donations to the OWB Community Fund are not tax deductible.

The **Silent Auction** generates funds that defray fixed costs of the Barrel Tasting. Excess net income is used to either supplement annual OWB fixed expenses, and/or is added to the OWB Charitable Giving Program at the direction of the Master Council. Items available for bid in the silent auction are donated by members, friends and wineries. Donated items are not tax deductible.

**Annual dues** for OWB members have been aligned to cover the fixed and administrative costs of the organization. The goal is to create a revenue neutral annual budget. There are events that do not generate income such as the Commander's Coffee and the Annual Meeting. Sufficient dues are collected to offset non-revenue generating events. Paid events such as Wine Maker or Ambassador Dinners are expected to be cost neutral with minor contributions from the OWB.

### About Internal Revenue Code (IRC) Section 501(c)(5)

[https://www.irs.gov/charities-non-profits/other-non-profits/labor-and-agricultural-organizations#:~:text=Section%20501\(c\)\(5,benefit%20of%20any%20member%3B%20and](https://www.irs.gov/charities-non-profits/other-non-profits/labor-and-agricultural-organizations#:~:text=Section%20501(c)(5,benefit%20of%20any%20member%3B%20and)