

# Virginia Wine Board Grant Report Template

## 1.0 INSTRUCTIONS

Use this grant report template to communicate progress on your project objectives to the Virginia Wine Board and its administrative agents.

This simplified form focuses attention on the intended and achieved results of the project, including how project results are separately shared with their intended beneficiaries. This report is not the place for a detailed technical discussion of research methodology or results.

- During the proposal stage, applicants complete the first (WHITE) sections to summarize the project's objectives, deliverables, and intended impact plus planned communication to stakeholders.
- At the midpoint of the project (December 1, due December 15), Research and Education grantees complete the center (GRAY) sections to note progress as well as expenditures to date.
- Finally, upon project conclusion (May 31, due June 30), all grantees complete the final (BLUE) sections to describe the project's results and communication, as well as the final expenditures.

## 2.0 GRANTEE INFORMATION

Project Title		<i>VWA Regulation and Rules Round Ups and Winery Resource Guide</i>			
Organization		Virginia Wineries Association			
Proposal # (if needed)		25-38		Award # (if needed)	
Project Lead		Mailing Address		Research	◇
Name	Christina Sandridge	250 West Main Street, Suite 100		Education	X
Title	Executive Director	Charlottesville, VA 22902		Marketing	◇
Email	director@vawine.org			Continuing ?	◇
Phone	(434) 326-9815			Year	1 of 1

## 3.0 PROJECT OBJECTIVE, PROGRESS, AND IMPACT

### 3.1 PROPOSAL (February)

*Summarize the project objective, the intended deliverable or result, and expected impact. (1-5 sentences or bullets)*

- *Continue to provide critical education and training to the industry on compliance issues, labor law, legislative updates, new law changes, etc.*
- *Ensure that members have pertinent and timely information proactively in order to remain in compliance*

*Summarize the project's workplan (1-5 sentences or bullets)*

- *Mary Beth Williams to identify pressing issues.*
- *Identify educators, experts, regulators to present.*
- *Schedule quarterly sessions to be held virtually, recorded and shared with members. One session will be held in-person during the Annual Conference in the fall.*
- *FordHarrison will be on retainer, to counsel on federal, state (Virginia), and local employment and labor laws. This affords members an opportunity to request advice and counsel.*
- *FordHarrison will present a refresher webinar to detail new wage and labor law issues.*

- *Mary Beth will update the Winery Resource Guide on a continual basis to provide the most current information on regulations, laws, and updates that affect the winery industry.*

*How will you know your project has been successful? What project indicators will measure progress or success? (1-5 sentences or bullets)*

Success is continuing to educate all 400+ members in order to proactively remain in compliance. Continue to improve the industry's relationship with regulatory departments and officials through the sharing of valuable information and opening lines of communication.

### 3.2 Mid-Year Report (December)—Research and Education Grants only

*Provide project indicator status information. Describe project/workplan progress. Include any obstacles the project has encountered and the plan to overcome them.*

Regulation & Rules Round-Up Sessions continue to be scheduled and held, addressing relevant and critical compliance issues. Recent email alerts to members have highlighted key topics, including beneficial ownership interest reports and the implications of the VinoShipper hearing for Virginia wineries' distribution.

One challenge has been organizing a session with the Virginia Department of Agriculture and Consumer Services (VDACS). Recent staffing changes within VDACS have made it difficult to confirm their participation, despite the importance of their insights for our members.

### 3.3 Final Report (June)

*Compare the project to the objective, workplan, and project indicators. Provide (as a link or attachment) the project deliverable or result. Describe the realized or expected impact of the project.*

The Virginia wine industry faces unique regulatory challenges, with complex rules and laws that many may not be fully aware of, potentially resulting in fines or loss of license. These programs deliver critical education and training through accessible statewide webinars, including a session at the Annual Conference. The virtual format ensures that wineries, no matter their location, have the opportunity to stay informed and prepared. The sessions also allow industry members to ask questions, seek clarification, and discuss real-world challenges with experienced professionals, enhancing their ability to implement best practices in compliance.

These initiatives strengthen the entire Virginia wine industry, equipping wineries with the knowledge and tools to navigate regulations confidently, mitigate risks, and focus on sustainable growth and innovation.

*"The Regulation and Rules Roundup, along with the Resource Guide, are critical in keeping me informed and conducting business within the many laws, rules, and regulations that farm wineries operate. The guidance I receive from experts in their field, Mary Beth Williams most notably, is guidance that my farm winery, Valley Road Vineyards, and most of our fellow wineries are unable to afford. In addition, when many wineries are following the same interpretation of those laws, rules, and regulations, the wine industry shows a united front and our willingness to work with the governing bodies." Stan Joynes, CEO, Valley Road Vineyards*

*"The guidance I receive from experts in their field, like Mary Beth Williams, is guidance that Eastwood and most of the wineries would be unable to afford on their own. In addition, when addressing what*

*are often broad principles in the law, it is very beneficial to all parties concerned to have an industry-led approach rather than relying on one-off implementation by individual wineries with potentially conflicting.” Athena Eastwood, Owner, Eastwood Farm and Winery*

#### **4.0 COMMUNICATION WITH STAKEHOLDERS**

##### **4.1 PROPOSAL (February)**

*Summarize how you will share project information or results. For example, will you submit for publication in a peer reviewed journal? Present at a technical conference? Conduct a training? Post on a site? Identify the specific audience/s you will inform. (1-5 sentences or bullets)*

- *Regulation & Rules Round Up Sessions are recorded and shared with all 400+ VWA members.*
- *Updates to the Winery Resource Guide are made as necessary and members have access to download the guide, handouts, and session materials from the VWA website utilizing their member login.*
- *Email blast sent to over 450 members on important updates or reminder of pending reporting deadlines.*
- *Quarterly electronic newsletter, sent to over 450 members, featuring relevant regulation and compliance topics.*

##### **4.2 Mid-Year Report (December)—Research and Education Grants Only**

*Describe communication with stakeholders to date. Note dates and locations of events or publications, as available/relevant.*

#### **2024 Regulation & Rules Round-Up Session Dates**

##### **Past Sessions**

- September 4, 2024 (31 live attendees):  
*Topic:* TTB Federal Excise Credit Changes  
Mary Beth Williams provided a detailed explanation of the changes from TTB and an interpretation of who qualifies for the CBMA federal excise credit.  
*Link for viewing:* [Watch the session](#)
- November 11, 2024 (at the Annual Conference-approximately 130 attendees):  
*Topics:*
  - State Legislative Updates
  - Music Licensing
  - Beneficial Ownership Requirements
  - Nutritional Labeling and more!*Link for viewing:* [Watch the session](#)

##### **Upcoming Sessions**

- December 18, 2024:  
*Topic:* TTB Reporting Part 3  
A Q&A session to help wineries prepare for the January 14 TTB tax due date. This session will also address reporting requirements for contract winemaking.
- January 2025:  
*Topic:* RetirePath Virginia Compliance for Wineries  
Webinar conducted by FordHarrison law firm.
- February 12, 2025:  
*Topic:* Succession Planning

- March 5, 2025:  
Topic: Marketing Refresher
- May 1, 2025:  
Topic: Shiners & Bulk Wine / Sales & Marketing

#### 4.3 Final Report (June)

*Describe how the technical or material content of the project was or is planned to be shared with stakeholders or beneficiaries. List title, date, type (article, brochure, presentation, or other), purpose, and estimated audience reached. Provide a copy or link if (when) available for inclusion on the [virginiawine.org](http://virginiawine.org) site.*

Updates to the Winery Resource Guide are made as necessary and can be accessed at:

<https://www.vawine.org/resource-guide/>

To ensure wineries have ongoing access to the latest regulatory and compliance information, Mary Beth Williams will continually update the VWA Winery Resource Guide, maintaining it as a comprehensive, up-to-date reference for the industry. Being grant funded, the Resource Guide is accessible industry-wide. Tracking downloads and clicks is not a currently available feature. Recent changes/additions include: Updated farm winery classes under state licensing; Added a section for TTB wine destruction request letter; Ongoing Requirements entire section was updated with new requirements and due dates, ABC resources, wine premises operations new percentages; Appendix section documents were replaced with updated documents. Ongoing updates are being made to the Recordkeeping section with the new farm winery license requirements.

Regulation & Rules Round Up Sessions were/are recorded and shared with all 400+ VWA members as well as posted on [www.vawine.org](http://www.vawine.org) for all to view. Compliance update emails are sent that include important updates of pending reporting deadlines. The VWA Vine, quarterly newsletter, includes reminders on upcoming sessions as well as links to view the recorded sessions. The newsletter is emailed to 450 members and all issues will be posted online at [www.vawine.org](http://www.vawine.org).

The dates and topics for Regulation & Rules Round Up Sessions may change throughout the year to accommodate more urgent issues as they arise. At the start of the year, staff collaborate with Mary Beth Williams to create a draft schedule, recognizing that while some topics are recurring annual updates, others must remain flexible to address critical matters that need to be communicated to the industry. Annual updates that are of importance to the industry include taxation, labor law updates, and TTB reporting.

Mary Beth is continually working with VDACS to confirm appropriate staff for an upcoming VDACS regulatory update session.

FordHarrison hosts an annual legal update webinar to review relevant labor developments and address questions. They also serve as a resource for staff and Mary Beth, providing support for any necessary follow-up or urgent issues that may arise during the year and need to be communicated to the industry.

September 4, 2024 – TTB Federal Excise Credit Changes (31 live participants, 40 watched the recording)– [Watch the session](#)

November 11, 2024 (Apx. 130 in-person attendees)– Annual Conference Session (legislative updates, music licensing, ownership requirements, nutritional labeling & more!) – [Watch the session](#)

December 18, 2024 – TTB Reporting Part 3 (37 live participants; 35 watched the recording)– [Watch the session](#)

January 21, 2025 – 2025 Virginia Law Update with FordHarrison (44 live participants; 18 watched the recording)- [Watch the session](#)

March 31, 2025 - Dos & Don'ts of Social Media (76 live participants; 36 watched the recording) - [Watch the session](#)

April 29, 2025 – Getting Virginia Wines Into the Wild (Distribution) (94 live participants; 52 watched the recording) – [Watch the session](#)

Link for viewing past Regulation & Rules Round Up Sessions: [Watch all sessions](#)

Three of the sessions were conducted using the Zoom webinar format, which automatically tracks both registrations and attendee lists. Across these three webinars, there were a total of 125 unique participants. For future sessions held in the regular Zoom meeting format, participation statistics can be manually tracked to ensure accurate reporting for upcoming grant submissions.

## 5.0 BUDGET

Budget Summary			Mid-Year Research/Education only		Final	
Expense Category	5.1 Requested	5.2 Awarded	5.3 Spent	5.4 Remaining	5.5 Spent	5.6 Remaining
Personnel						
Fringe Benefits						
Travel	\$1,000	0				
Equipment (Rental)	\$5,000	0				
Supplies						
Contractual	\$39,000	\$39,000	\$15,000	\$24,000	\$19,025	\$4,975
Other						
Total	\$45,000	\$39,000	\$15,000	\$24,000	\$19,025	\$4,975