



# 2024 ANNUAL BENEFIT REPORT

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**SYNDICATE WINE, LLC**



# Mission & Vision

## Mission Statement

The term, "syndicate" describes a group of people united around a common cause. Our passion is to curate and develop an intentional, high-quality library of wines and education for our audience, whether as dine-in wine bar customers, retail customers, or our growing wine club membership.

## Manifesto

At Syndicate, we believe in the principles of balancing people, planet, and profit. We believe in listening to our guests and team, at all levels, to ensure we are hearing a variety of points of view and perspectives. We believe that all humans are imperfect and should not be judged by our differences, small mistakes or incongruencies. We also believe in creating a fun and relaxing environment for our guests and our employees. Our jobs should be fun. To "sell all the wine", our team is tasked with creating an environment that is welcoming, accepting, and encouraging of all levels of wine education. We pride ourselves in backing each other up and supporting our community against all odds.



# Definitions

## **Description of Business**

Syndicate Wine, LLC dba Syndicate Wine Bar is a multi-faceted business, offering hospitality and dining services, a brick-and-mortar bottle shop, and subscription-based wine club.

As a community fixture in Beaverton, Oregon, we are the only establishment within the greater Westside operating primarily as a wine bar and restaurant. Several area businesses offer a retail bottle shop, but without a focus on high quality or intentional inventory. Additionally, outside of a handful of local and actual wineries, we are the only wine bar that maintains a subscription-based wine club (currently at 160 members and growing steadily).

## **Legal Structure**

Syndicate Wine, LLC, dba, Syndicate Wine Bar was established in February 2019. We are an Oregon Benefit Company, designated by the State of Oregon's Secretary of State's Office, certified by Benefit Corporations for Good. Syndicate is an LLC with two owners, Angela and David Anderson.



# Principal Owners

The two owners, Angela Anderson, MBA, and David Anderson, WSET, are a husband-and-wife team with decades of combined experience running and managing successful businesses.

## **Angela Anderson, MBA**

Angela brings a specialty in Organizational Dynamics and Operations along with 20 years' experience in managing companies of all sizes and sectors. She assists in creating efficient systems that lead to lower operational costs and higher customer engagement. Angela has an MBA in Organizational Psychology and a Bachelor's in Communications. Angela specializes in operations and finance, helping business owners understand their specific revenue cycles, as well as areas of greatest opportunity in business structures and fiscal responsibility. She also uses her experience in management to unify and unite teams into common goals and structures so that everyone can operate in a concise direction and mission.

## **David Anderson, WSET- Level III**

David has a Bachelor's Degree in Art and International Studies Minor from Linfield College, and has extensive experience working with major global businesses, consulting companies, and government agencies. For 20 years, David worked as founding owner of Canvas Host, an Oregon website hosting and design agency to build and manage websites for respected brands such as Oregon Department of Justice, Hot Lips Pizza, and Linfield College, as well as numerous Oregon wineries. David is also a certified sommelier, having earned WSET III with Merit credentials from the Wine & Spirits Archive in Portland, Oregon.

# Balancing...



**People**



**Planet**



**Profit**



# People

## External Achievements:

- Joined the Business Advocacy Council with the Beaverton Area Chamber of Commerce
- Attended Focus Groups for the Beaverton Downtown Association
- Selected legal leadership from a fellow BCFG Oregon Benefit Company
- Attended numerous City Council/Beaverton Urban Renewal meetings advocating for Old Town Beaverton issues
- Advocated for increased parking for mobility-challenged, families, & the community
- Enhanced our on-site parking for our mobility-challenged community
- Spoke up for increased building safety, lighting, and safer sidewalks
- Joined the Central Beaverton Business Association with fellow landlords and business owners
- Added bingo and trivia with Stumptown Bingo & Trivia for more family-friendly options

## Internal Achievements:

- Built a permanent outdoor patio
- Built a VIP Wine Cellar to increase education offerings
- Started brainstorming monthly Wine 101 curriculum
- Successfully completed our 3rd Syndicate Block Party as the largest wine event in Beaverton, showcasing micro, small, medium to large labels
- Increased our weekend brunch programs, marketing specifically to families
- Created a hybrid position to allow for longer maternity leave
- Maintained a 5 day work week for all employees, 2 days off together
- Provided benefits to all employees working 30 hours or more a week



# Planet

## **External Achievements:**

- Went down to one vehicle for the owners to reduce carbon footprint
- Closed secondary location which decreased daily driving by 1000 miles per month
- Attended community meetings via Zoom whenever possible
- Installed short-term and long-term bicycle racks

## **Internal Achievements:**

- Reduced our garbage footprint by utilizing and creating an internal food program, resulting in a reduction in garbage produced by over 50%
- Recycled all glass bottles, corks, and cardboard through City recycling programs
- Delegated weekly shopping duties to the Kitchen Team to hand select produce, meats & cheeses so that waste stays at a minimum.
- Started mixed-media art gallery with repurposed wine bottles, corks, and enclosures



# Profit

## External Achievements:

- Selected 4 annual charities that fit ownership passions
  - Mover of Mountains Gala- fundraising for higher education scholarships
  - Alzheimer's Association of America- funding continued research for Alzheimer's
  - Hillsboro Community Fund- updating fields and equipment for youth sports
  - Chehalem Cultural Center- funding continued arts education for all ages
- Fought against programs that would cost our small business community more in taxes, membership, and construction (projected \$4.5 million First Street Dining Commons permanency)
- Facilitated pop-up programming with retailers that were struggling for business
- Advertised fundraising campaigns for a small business that experienced a traffic accident through their front door of their business
- Cross-promoted dining and shopping weekends with our neighboring businesses

## Internal Achievements:

- Closed secondary location that had not been profitable since inception
  - Decreased bills in all categories (Rent, utilities, payroll, travel)
- Found a new-subtenant to take over remaining lease of secondary location (3 years)
- Closed data center location and moved hosting to smaller Beaverton area business
- Finished all external and internal construction for the 1st time in 5 years
- Formalized 5 primary 2024 financial goals and strategic alignment focuses

THANK YOU  
FOR **EVERYTHING!**

Tom Hering, Co-Founder, Benefit Corporations for Good  
Michael Jonas, Rational Unicorn, a BCFG business

Kris & Matt Brady  
Graham Brown, Stumptown Taps/Bingo & Trivia  
Syndicate Wine Club Members & regulars  
Syndicate Employees and Seasonal Staff  
Our friends and family

Rhonda Reister, Central Beaverton Business Association  
Alicia Bermes, Beaverton Area Chamber of Commerce  
Kyle Todd, Beaverton Downtown Association

Brett Breece, Hillsboro Hops/Hillsboro Community Fund  
Sean Andres, Chehalem Cultural Center  
Dana Taylor, Alzheimer's Association of America

*Truly  
Grateful  
for you.*

**Our Old Town Beaverton  
business community!!!**



# Goals for 2024

## Education

- More educational opportunities for Wine Club, guests, and employees
  - Wine Maker Spotlights 2x a month
  - Weekend Classes 1x a month (minimum)
  - Increase usage of the The Cellar

## Experiences

- More variety in the bottle shop (price points and varietals)
- A clear programming schedule for 2024 (preplanned in January)
  - Off site opportunities into wine country
  - Wine Tours, harvest day volunteering, barrel sampling
  - 2024 Syndicate Block Party with more wines and more shopping

## Operations

- Expansion of the menu to include more hearty options
- Increase efficiency in our storage areas
- Andersons not working 7 days a week, quarterly vacations