

*Dudley Foundation*

# ANNUAL REPORT 2020

ANNUAL REPORT + EXECUTIVE SUMMARY

INTENT

GRANT-MAKING

TECHNOLOGY

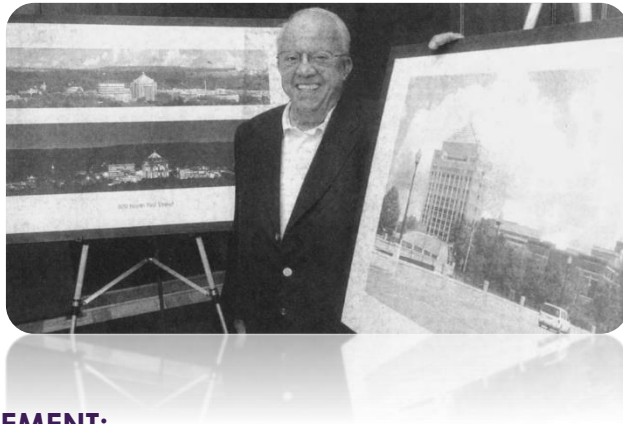
STRATEGY





# ANNUAL REPORT 2020

## ANNUAL REPORT + EXECUTIVE SUMMARY



### MISSION STATEMENT:

“The mission of the Dudley Foundation is to aggressively seek and support community development that enriches the lives of people residing in the City of Wausau, Marathon County, and the State of Wisconsin.”

### DONOR INTENT STATEMENT:

“I have spent my entire life in Wausau, Wisconsin where I raised my family, built many successful business ventures, enjoyed good friendships and volunteered my time, talents, and financial resources toward projects and concerns which have enhanced the community and improved the quality of life for its people. I feel very passionate about a person’s responsibility to give back to one’s own community, thus making it a better place for the current generation as well as future generations. I established the Dudley Foundation to make the Wausau community a better place. Defining “better place” is the mission of the Board of Directors. I purposefully left the Dudley Foundation’s charitable purpose broad, allowing the current board of directors, as well as future board of directors the flexibility to define “better place”. I have great faith in the ability of people. I am confident that the leadership of the Foundation, at any given point in time, will be able to determine for themselves the most pressing needs and identify emerging opportunities and how best to address them. Thus, it is my intent as the Founder of the Dudley Foundation that the funds be distributed for charitable purposes allowing for the community to become a “better place” in the following order of geographic priority: the City of Wausau, the County of Marathon, and thirdly the State of Wisconsin. I further intend that my children, grandchildren, and great grandchildren and other community members who will participate in the Dudley Foundation will come to know and appreciate the value of philanthropy and gain a true sense of community. The Dudley Foundation should be a tool for providing this educational opportunity. **Giving of one’s time, talent, and treasure, should be a guiding philosophy in all our lives. I ask that you reflect on your own philanthropy and periodically ask yourself whether you are being a good steward to the community you call home.**”

### INTENT



### MISSION:

“The mission of the Dudley Foundation is to aggressively seek and support community development that enriches the lives of people residing in the City of Wausau, Marathon County, and the State of Wisconsin.”

### DONOR INTENT:

“Those who will participate in the Dudley Foundation will come to know and appreciate the value of philanthropy and gain a true sense of community. The Dudley Foundation should be a tool for providing this educational opportunity. Giving of one’s time, talent, and treasure, should be a guiding philosophy in all our lives. I ask that you reflect on your own philanthropy and periodically ask yourself whether you are being a good steward to the community you call home.”



# *Dudley Foundation*

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## **ANNUAL GRANT-MAKING [2019-2020]**

37 Grants

\$296,072 Awarded

COVID-19 Relief Fund Contribution

3/5 YMCA Payments Made

NTC Garden-to-Table Paid Off

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## GRANT-MAKING

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### **LEGACY GRANT-MAKING & FUTURE GRANTS**

600+ Grants

\$4,500,000+ Awarded

380+ Grants focused on Arts & Culture,

Education, and Human & Child Services

Legacy Grant-making: YMCA, Boys & Girl's Club, Junior Achievement, etc.



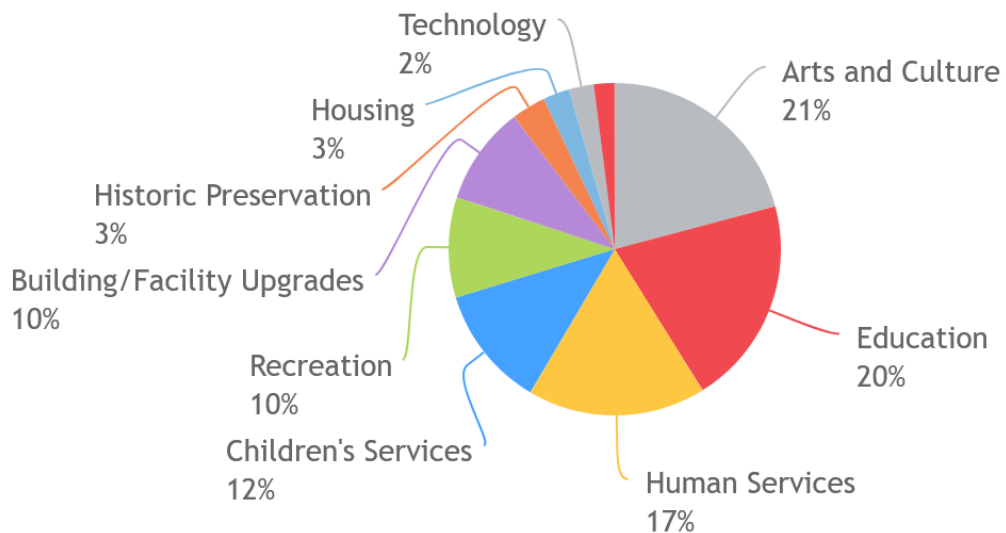
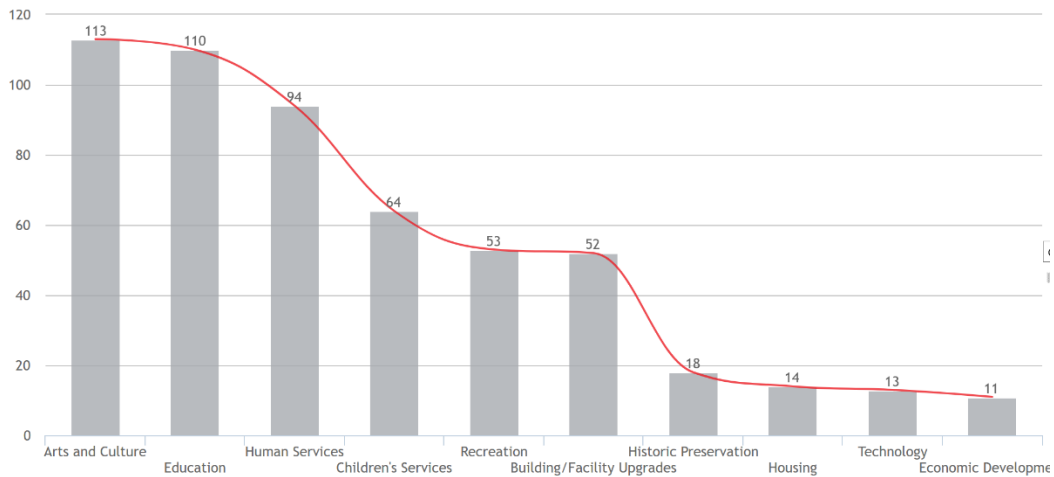
## ANNUAL GRANT-MAKING [2019-2020]

Edgar School District	A Walk in Their Shoes Presentations	\$ 5,000.00	Sep-19
Junior Achievement	JA It's My Future	\$ 15,000.00	Sep-19
KATS	Operations	\$ 5,000.00	Sep-19
Merrill Historical Society	Preservation Center	\$ 7,500.00	Sep-19
OccuPaws Guide Dog Association	Guide Dog Training & Placement	\$ 5,000.00	Sep-19
Rise Up Central Wisconsin	Arts Supplies	\$ 3,000.00	Sep-19
Wisconsin Institute for Public Policy & Service	Central WI Journalism Program	\$ 5,000.00	Sep-19
Childcaring, Inc.	Good Start Financial Aid	\$ 2,500.00	Dec-19
City of Wausau	Downtown Dog Park	\$ 5,000.00	Dec-19
Wausau Pro Musica	Performance	\$ 500.00	Dec-19
Good News	Building Campaign	\$ 16,120.00	Dec-19
Granite Peak Ski Team	Youth Racing Program	\$ 2,500.00	Dec-19
Great Northern Blues Society	Performance	\$ 500.00	Dec-19
Hmong American Center	Festival 2020	\$ 2,500.00	Dec-19
Raptor Education Group	Outdoor Native Songbird Enclosure	\$ 5,000.00	Dec-19
Neighbor's Place	Share Your Holidays - Food Bank	\$ 7,500.00	Dec-19
Neighbor's Place	Unrestricted in Honor of Tom Rau	\$ 2,500.00	Dec-19
Salvation Army	Share Your Holidays - Food Bank	\$ 7,500.00	Dec-19
South Beach Chamber Ensemble	Music Scholarships/Performances	\$ 500.00	Dec-19
Summit Players Theater	Shakespeare in the State Parks	\$ 2,000.00	Dec-19
United Way of Marathon County	Life Report	\$ 2,200.00	Dec-19
Wausau/Marathon Co. Parks, Recreation & For	400 Block Seating	\$ 3,000.00	Dec-19
Wausau Lyric Choir	Performance	\$ 500.00	Dec-19
Aspirus Health Foundation	Family House at Aspirus Campus	\$ 25,000.00	Dec-19
Habitat for Humanity	Garbage Corral	\$ 5,000.00	Mar-20
Performing Arts Foundation	Annual Fund Drive	\$ 15,000.00	Mar-20
American Legion Post 492	Gold Star Mother's Memorial	\$ 5,000.00	Mar-20
American Legion Post 10	Veteran Street Banners	\$ 5,000.00	Mar-20
North Central Technical College	Garden to Table Program	\$ 15,000.00	Mar-20
Community Fnd of North Central WI	COVID - 19 Relief Fund	\$ 25,000.00	Mar-20
Woodson YMCA	Downtown Building Project	\$ 50,000.00	Jun-20
Special Olympics of Wisconsin	Virtual Training COVID-19	\$ 5,000.00	Jun-20
CWIMMA	Metal Manufacturing Scholarships	\$ 10,752.00	Jun-20
Boys and Girls Club of the Wausau Area	STEAM Program	\$ 10,000.00	Jun-20
River Valley Jazz Society	Student Scholarships	\$ 500.00	Jun-20
Marathon County Literacy Program	Learning Center for Adults	\$ 5,000.00	Jun-20
Medical College of Wisconsin	Osmosis Software Program	\$ 14,000.00	Jun-20
<b>37</b>	<b>TOTAL:</b>	<b>\$ 296,072.00</b>	



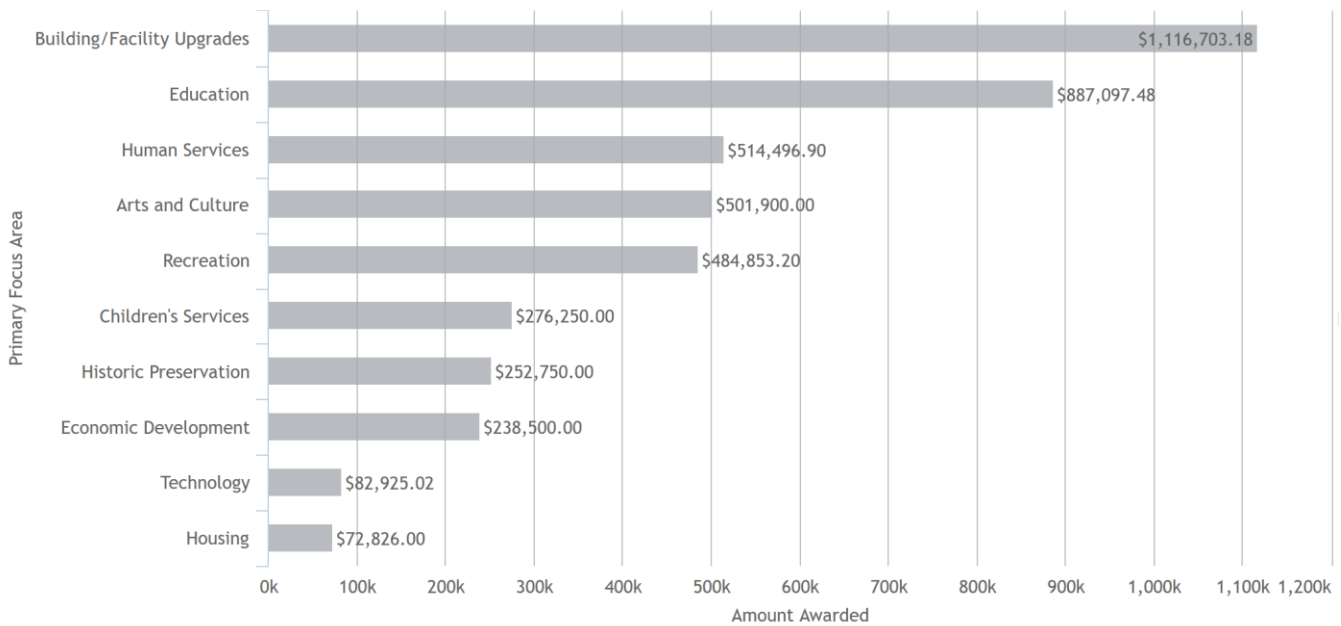
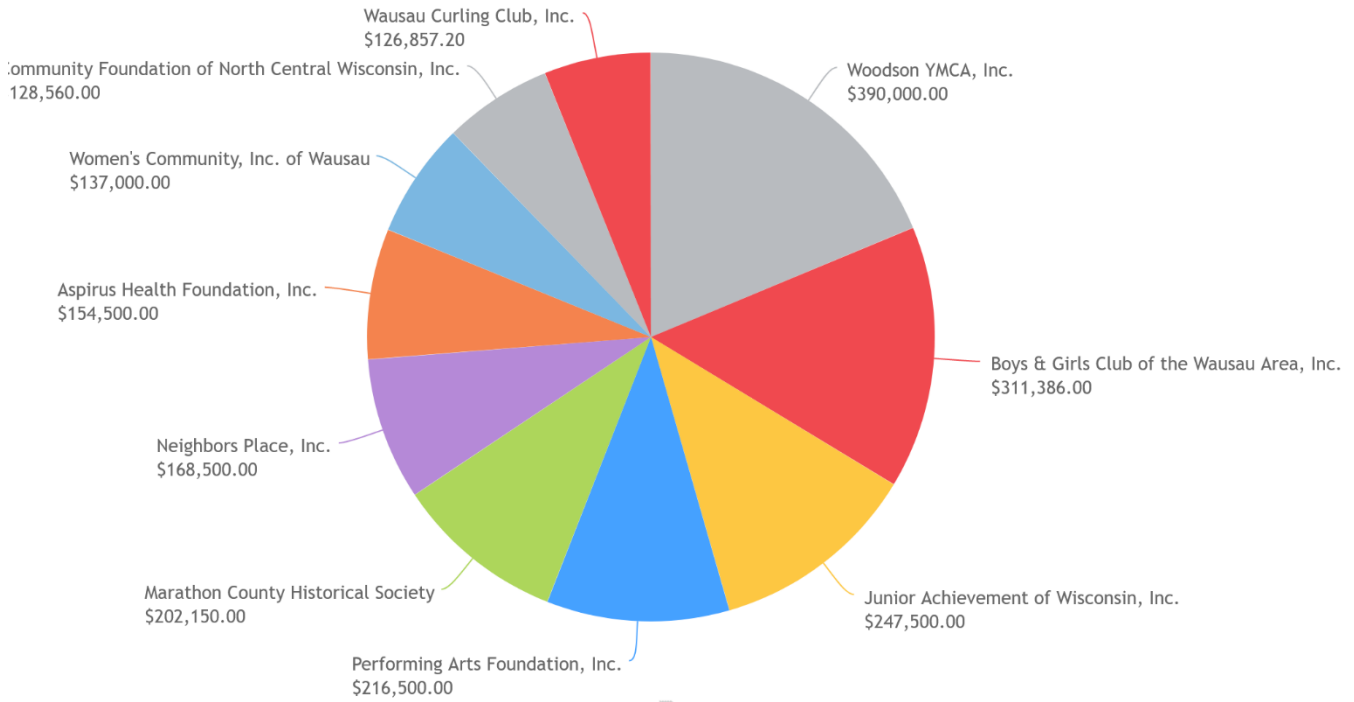
## GRANT-MAKING SINCE INCEPTION

- 600+ Grants\*
- \$4,500,000+ Awarded\*
- 380+ Grants focused on Arts & Culture, Education, and Human & Child Services
- Legacy Partners: YMCA, Junior Achievement, Boys & Girls Club, Performing Arts Foundation





GRANT-MAKING SINCE INCEPTION CONTINUED





# ANNUAL REPORT 2020

## ANNUAL REPORT + EXECUTIVE SUMMARY

### FOUNDANT

The Foundant data migration is complete! Over 580+ legacy grants made their way over to our Foundant system. This process now allows the Foundation to draw upon old data for reporting purposes (as you have seen above with the pie charts and graphs exhibiting some of our legacy data). From pen and paper, to Blackbaud Gifts online, to our new Foundant system – all the data has now been conglomerated onto a single database. Grantees input their own contact, organizational, and grant information virtually and at their own leisure. This process automatically captures the data that is inputted, taking time-consuming, clerical legwork out of the picture. The processes involved (which include grant applications, evaluations, follow-ups, and all that jazz) can only become sharper moving forward!

### EQUIPMENT

The Foundation has gone through some major changes involving the implementation of new technologies. From software systems, to enhanced internet security, we have crossed into the digital realm! The importance of new technologies cannot be stressed enough as we move forward. Already, we have seen the benefits of being able to continue our operations virtually – Grantees have been able to continue the grant application process without having to go through “physical” hurdles that the Foundation may have had issues with in past years. This has only been exacerbated by the COVID-19 pandemic.

### FUTURE

The strides that have been made are significant, but there are always new initiatives and technologies that can become available down the road. The Foundation, currently, is going through a website transition from Kinzie-Green Marketing Group. Our dear friend Kirk Howard is riding off into the sunset, and his “consigliere” Chris will be opening a new business “Tiki-Time” that will continue to host our domain for the Dudley Foundation website. A watchful eye is needed to navigate through this development – especially since our grant application is dependent on the website’s ability to remain up and running.

In addition, Andy is working on even more virtual options including WebEx videoconferencing. Uncertainty is a common theme these days with the COVID-19 pandemic keeping folks out of their respective offices. The Foundation will need to be flexible and at the very least offer different avenues for communicating efficiently.

## TECHNOLOGY



### EQUIPMENT:

- Desktop Computer
- Nextiva Office Phone
- 10<sup>th</sup> Floor Conference Phone
- Photocopier
- Printer
- Scanner
- Charter Internet ISP
- Firewall
- Modem
- Router
- Antivirus Software
- Malware Software
- Microsoft O365 Operating System
- Microsoft O365 Board Member E-mails
- Barracuda Email Security
- Website Domain
- Voicemail to E-mail Integration

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### COVID-19

The Coronavirus pandemic has proven to be a challenge that many organizations are trying to navigate through. Organization's aims and future goals have been altered on a scale that has not been seen since the economic recession of 2008. As such, our strategies regarding much of our day-to-day operations have been updated and managed appropriately so that the Foundation can continue to do the work that is necessary for the community. We acted quickly and helped fund the collaborative effort between the United Way and the Community Foundation of North Central Wisconsin. The financial influence that this collaborated effort has provided for nonprofits and organizations in the community is provided at the end of this report.

### FUTURE INVOLVEMENT

As per the COVID-19 strategy, in-person meetings have been postponed. The safety of our grantees and fellow peers is a concern that must not be taken lightly. Communication is key during these uncertain times, and the Foundation has taken steps to stay in line with the needs of the non-profit community. Andy has participated in multiple non-profit virtual conversations that have been extremely useful for discerning what these organizations need to function at the time being. Human service grants as well as organizational operating assistance grants are likely to be more prevalent moving forward – especially if things turn sour and head toward another shutdown. Keeping these fine folks in their organizations is paramount towards a healthy "rebound". We, as a community, cannot afford to lose talented and good-hearted people simply because we were all caught flat-footed by an event like COVID-19.

Some big initiatives are still taking place to consider (though efforts may have stalled due to the re-assessment of organization's goals):

- Grand Theater – "lighting project" (most likely will occur Q4 of 2021)
- Monk Gardens – "visitor center" (most likely will occur Q3 of 2021)
- NTC – "post-production facility" (most likely will occur in Q3 of 2021)

## STRATEGY



### GOALS:

- Supervise the transition to "Tiki-Time" domain hosting
- Perpetuation of the crafted Succession Plan
- Transition to "QuickBooks online" for financial record-keeping
- Update the website
- Monitor the COVID-19 pandemic and respond appropriately
- Provide "sharpened" reports, evaluations, and follow-ups via Foundant
- Continue to assess rising needs in the community
- Remain active in communicating with grantees (virtually)





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\$5,500,000 Original Endowment

\$4,679,318.78 Awarded Funds

\$8,657,570 Asset Allocation Year End



CURRENTLY

*William Blair*

**\$9,375,345**

Asset Allocation Sum

(As of August 31<sup>st</sup>, 2020)

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600+ Grants

300+ Organizational Partnerships

400+ Contacts

1 Family Team

**THANK YOU ALL!**



(Foundant User Data)

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