

ANNUAL REPORT

Fiscal Year 2014



A Year of Growth and Promise

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On The Cover...

Fiscal year 2014 was a year of much growth and achievement for the Foundation. We announced the beginning of our primary initiative "Bright & Early DuPage," which aims at ensuring all children ages 0-5 are prepared to enter kindergarten.

The Bright & Early DuPage logo (right) was unveiled at a media round table which introduced the initiative to the public and the press.

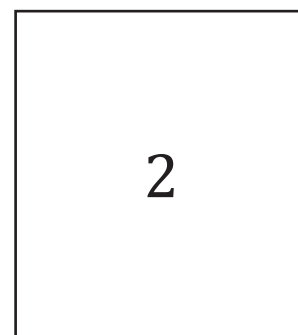
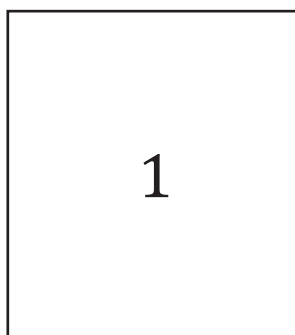


Photo Credits:

1: DuPage Historical Museum Quilt Workshop, August 2013.

2: Wheaton Library Play to Learn, October 2013.

Letter From Our Chair and President

Dear Friends,

On behalf of The DuPage Community Foundation's Board of Trustees, committees and staff, we are pleased to present you with our Annual Report for the fiscal year ending June 30, 2014.

Last year, we reported in this letter that the Foundation was completing a year of significant changes, positioning itself to both encourage and accommodate continued growth. Thanks to your support, the Foundation has, for its second consecutive year, experienced record growth, enjoying a nearly 27% increase in total assets under management, rising from \$47 million to just shy of \$60 million (a threshold that we subsequently crossed in August 2014).

This increase speaks volumes about the commitment of you, our valued donors and partners, the outstanding leadership of our Board and Committee members, and the efforts of our dedicated staff. More importantly, it is allowing us to significantly ramp up our grant-making and community leadership activities. The total amount of Foundation grants awarded in FY 2014 increased by more than 30% from FY13, surpassing the \$3 million mark for the first time and bringing total grants awarded over our 28-year history to more than \$19 million.

On a local level, the impact of our Community Needs Grant program also increased significantly thanks to the help of our donor-advisors who recommended an additional \$124,646 in support above our FY14 budget. The combined total of \$588,415 in support represents a 13% increase over FY13. These grants are critical as they fund the most pressing needs of our area not-for-profits, helping them raise the quality of life for the residents of our community. Grants from this program feed the hungry; treat the sick; provide education, training and new opportunities for those in need of assistance; and ensure the health and wellbeing of our beautiful outdoor spaces along with the vibrancy of our arts organizations.

Our growth is also affording us the opportunity to take on a leadership role in key community initiatives. In November 2013, we officially launched our Bright & Early DuPage initiative, which aims to ensure that all DuPage County children, ages birth to five, are prepared to enter kindergarten and poised to lead successful lives. Through this initiative we have now helped organize and implement two collaboratives—one in Wheaton/Warrenville's School District 200 and the other in Addison. These collaboratives are providing a host of invaluable services to at-risk children and their families so they may receive the tools and resources needed for the children to thrive and grow up to become healthy and productive members of our community.

Despite the significant wealth that exists here in DuPage County, approximately 3,000 children are born each year to families with incomes below 200% of the Federal Poverty Level. This means that 11 out of every 30 kids born in our county each day are at risk for not being ready for kindergarten. Fortunately, the Foundation is committed to addressing this issue and has pledged hundreds of thousands of dollars over the coming years to work toward making our vision a reality of having 100% of DuPage County children ready for kindergarten. Our endowment for this initiative totaled nearly \$6 million at the end of FY14.

In looking ahead to the coming year, we anticipate many more exciting developments that will allow us to better serve you and our community. We look forward to sharing them with you as they take shape. For now, we thank you for your ongoing support, your confidence and trust in our stewardship, and for all you do to help us advance philanthropy here in DuPage County and beyond.



Stephen M. Burt



David M. McGowan

A handwritten signature in dark ink, appearing to read "Steve".

Stephen M. Burt
Board Chair

A handwritten signature in dark ink, appearing to read "Dave".

David M. McGowan, CFRE
President

Foundation Fast Facts

The DuPage Community Foundation is the leader in matching people's charitable passions with the needs of our community. Whether you want to give today or leave a legacy, we're here to help you achieve your charitable goals and ensure that the causes you care about are supported forever.

It's your community. It's your Foundation. Give through us and make a difference in your community now, and for generations to come.

Founded:

1986

Mission:

To foster philanthropy, connect donors to area needs and build community partnerships.

Vision:

The DuPage Community Foundation seeks to raise the quality of life throughout DuPage County.

Our Core Competencies:

1. We are in tune with the needs of the County making us the go-to resource to learn about the local charitable landscape.
2. We promote personalized giving and have professional philanthropic advisors on staff who are knowledgeable about a wide variety of ways to make gifts and help people achieve their unique charitable goals.
3. We manage a permanent endowment to ensure that the needs of the county will be served in perpetuity.
4. We manage donor-advised funds to help donors realize charitable passions locally and abroad.
5. Our expertise makes giving easy. We do all the research, due diligence and tax reporting.
6. The Foundation's staff is always ready to help, educate, problem-solve and inspire.

By The Numbers:

1,692



The number of donors in Fiscal Year 2014.

\$5,927

Average gift amount to the Foundation in Fiscal Year 2014.

16.26%

12-month Main Investment Pool return net of fees (July 1, 2013-June 30, 2014.)

\$59.5 million

Total amount of assets under management as of June 30, 2014.

16

The number of new funds established in FY14.

We're Here to Serve You

Donors

Our professional staff provides each donor with the highest level of efficiency, flexibility, personal service, expertise, accountability, anonymity (if desired), perpetuity, and maximum tax benefits for all gifts contributed.

The minimum amount necessary to establish a named endowment fund is \$25,000. However, we welcome and encourage gifts of any size to an existing fund.



Former Trustee Janet Hodge and her husband Fred made a generous gift to the Foundation in December to establish the Hodge Family Fund, a donor-advised fund.

Not-For-Profits

The Foundation makes grants annually to not-for-profit organizations serving DuPage County residents. We also provide referrals to alternative funding sources, individual consultations and training opportunities in the form of seminars and workshops.

A number of area not-for-profits also enlist the Foundation's support in their endowment-building and planned giving efforts. From providing assistance in the development and marketing of your organization's programs, to cultivating relationships with area professionals and philanthropic leaders, the Foundation can help you strengthen your organization and ensure its long-term success.

(l. to r.) Grant Committee member Deborah duVair, Natalie Biancalana, Jim Biancalana, Audra Hamernik and Judy Biancalana at the Foundation's Spring Grant Breakfast. Hamernik represented BlueStem Housing Partners which received a grant from the Edward and Minnie Ceragioli Fund, of which the Biancalanas are donor-advisors.

2014 ANNUAL REPORT

Professional Advisors

Whether you are an accountant, attorney, financial advisor, life underwriter or trust officer, the Foundation is here to assist you in accomplishing the charitable objectives of your client.

From offering organizational assistance and personal contacts, to providing educational seminars and individual site visits to local charities, it is our pleasure to assist you in any way we can to facilitate the giving process for you and your clients.



Foundation friends John Vires, chief investment officer and partner for Trust Company of Illinois, and Tim Midura, chair of Huck Bouma PC's Estate Administration and Contested Estates and Family Conflicts groups, presented a seminar with Foundation Director of Development Mike Sitrick (not pictured) titled "Year-End Investment, Tax and Estate Planning Opportunities for 2013 and Charitable Gift Planning Strategies" at Arrowhead Golf Club.



The DuPage Community Foundation 5

Types of Funds

General Endowment

This fund allows donors to pool gifts of all sizes into a permanent endowment designed to provide the Foundation maximum flexibility in meeting the most pressing needs of our community today and in the future.



NAMI DuPage is one of more than 60 area not-for-profits to have an agency endowment and/or designated fund with the Foundation.

Field-of-Interest Funds

These funds allow donors to pool their gifts into a common fund that will generate perpetual support for a shared area of interest among numerous donors (e.g., the arts, children and youth, the environment, seniors).

Donor-Advised Funds

These funds allow donors to create their own funds, and gives them the opportunity to remain an integral part of the giving process by recommending grants from such funds to the agencies and programs they wish to support.



Veterinary Technician Jade Cheney benefitted from a gift from a donor-advisor of the Companions' Fund of The DuPage Community Foundation to Joliet Junior College.



Scholarship Funds

These funds provide a permanent vehicle for donors to help graduates of area high schools pursue their continuing education goals.

Agency Endowment & Designated Funds

These funds provide perpetual support in the form of income for a specific not-for-profit. They can be established either by the agency or by a common donor.

Operating Funds

These funds are used to support the general operations of the Foundation.



Foundation Vice Chair Joan Morrissey explains the intricacies of the Foundation during a new Trustee orientation. Joan is also a donor-advisor, together with her husband, Joe, for the Morrissey Family Fund.

Giving Opportunities

One of the principal advantages for donors who give through The DuPage Community Foundation is flexibility. To this end, the Foundation offers donors a variety of tax-effective ways to make gifts that achieve their charitable goals.

Cash

Cash is the easiest way to contribute to the Foundation and will qualify for the maximum allowable income tax deduction.

Marketable or Closely-Held Securities

Appreciated stocks and bonds may be given to the Foundation, allowing donors to deduct their current market value as a charitable contribution and avoid capital gains tax on assets that have appreciated in value.

Real Estate

Real estate may be given to the Foundation at its current market value, allowing donors to receive a full deduction for such value and avoid capital gains tax on any appreciation.

Life Insurance

Life insurance can be used to create a major gift to the Foundation in one of two ways. First, donors can transfer ownership of a policy to the Foundation and receive a current income tax deduction in the year the transfer is made. Second, donors can name the Foundation as a beneficiary of the policy while retaining ownership of the policy for their lifetime.

Retirement Plans

Donors can make contributions from an IRA or other retirement assets such as a 401(k), Keogh, or 403(b) to establish a new fund or contribute to an existing fund at the Foundation.

Transfer from an Existing Private Foundation

Administering a private foundation under IRS rules can be burdensome and expensive. Transferring the assets into a donor-advised fund at The DuPage Community Foundation provides a cost-

effective alternative for administering these funds well into the future.

Charitable Lead Trusts

These trusts provide income to a fund at the Foundation for a set number of years for such charitable purposes as the donor has specified. Then at the end of that period, the remaining principal of the trust and any accumulated appreciation is distributed to children, grandchildren or other named beneficiaries, often with significant tax savings.

Charitable Remainder Trusts

This type of trust can be created so donors or other beneficiaries receive income for life or for a given number of years. At the death of the beneficiary or the expiration of the number of years, the remainder of the trust passes to the Foundation to accomplish the charitable purposes specified by the donors.



Ronald L. McDaniel of the Ronald L. McDaniel Foundation was a participant in a three-member panel moderated by Foundation President Dave McGowan. The panel was featured at the West Suburban Philanthropic Network's monthly program held in June 2014 at Wheaton College.

Welcome to Our New Fund Partners

The Foundation welcomed the establishment of 16 new funds during the fiscal year ending June 30, 2014. They are listed below.

We are forever grateful to our donors for their passion and commitment to helping advance philanthropy throughout DuPage County and beyond, and we appreciate the confidence and trust which they place in us.

Agency Endowment & Designated Funds

- American Dairy Products Institute Jim Page Memorial Scholarship Fund
- Diamond Youth Foundation
- Geyer Family Designated Fund
- People's Resource Center Charitable Gift Annuity Fund II
- Tri-Town YMCA Endowment Fund



Diamond Youth Foundation Board Member James Jackson (left) and President Robert Engram are proud of the number

of high school students who have been helped by the Diamond Youth Foundation, which established an endowment fund with us in November 2013.

Donor-Advised Funds

- Jim Durham Memorial Fund for Communication Arts
- Rachel Gibson Memorial Fund
- Hodge Family Fund
- JCS Endowment Fund
- Lewis E. and Jean C. Neill Fund



Dianne and Don Skeet set up a scholarship fund for students of Glenbard East High School.

Scholarship Funds

- Russell B. Dahl Memorial Scholarship Fund
- Falcon Pride Scholarship Fund
- Frank S. Morrison Memorial Pass-Thru Fund
- Donald and Dianne Skeet Scholarship Fund
- Wheaton Community High School Men's Alumni Club Scholarship Fund

Field-of-Interest & Unrestricted Funds

- Emergency Fund

Jean and Lewis Neill established a donor-advised fund through a legacy gift made from a charitable trust, and they named their children as advisors for the fund.



(Left): The Jim Durham Memorial Fund for Communication Arts was created to honor Jim Durham, best known as the voice of the Chicago Bulls.

Advisor's Corner

And, Have You Considered Charitable Gifts?

This question is often met with an awkward pause during attorney-client estate planning visits.

After the initial gathering of financial information, including the value and composition of the client's estate, and then discussion of the persons to be designated decision-makers upon the clients' death or incapacity, the conversation turns to intentions: What are the client's goals for the disposition of his or her estate? While there may be discussion of how the estate will provide for the survivor of a couple, or how to avoid paying more estate taxes than are necessary, the estate planning conversation is often the first time clients consider what they could do for charitable causes if family members don't need all of the money and other assets they have accumulated during their lifetime.

Because they have been so focused on saving for retirement, they have not given any consideration to charitable giving through their estate after their death. While almost all are generous givers during their lifetimes, most have not contemplated the impact of what a share of their prosperity could do for their favorite charities if bequeathed to them as a legacy gift.

The suggestion of charitable giving can spark a new conversation with clients, often opening up an unexplored avenue to generosity. For some clients it then becomes as simple as naming a residuary beneficiary. For others, it begins a discussion of more involved planned giving, including designating charitable beneficiaries on qualified accounts, establishing a remainder trust, or even creating a family endowment fund to perpetuate the value of giving back to the community.

An organization like The DuPage Community Foundation can be an excellent conduit to help clients accomplish such goals because it provides a range of simple, flexible solutions that are cost-effective and which allow clients to focus on the heart of their desire—making a lasting, meaningful impact in the future.

No matter where the conversation ends that day, I believe that these discussions plant the seed of an idea that will eventually lead to charitable giving for the benefit of our community and the causes closest to the clients' hearts.

So, what's your answer? Have you included charitable gifts in your estate planning?



Rebecca Boyd-Obarski is an attorney with Nagle Obarski PC in Naperville. She concentrates her practice in estate planning, probate and trust administration, formation of small businesses and not-for-profit corporations, mechanics lien rights, and protection of her clients' intellectual property.

Five Questions to Get the Conversation of Long-Term Charitable Planning Started

- 1) Do you currently support any charitable organizations either by volunteering or giving financially?
- 2) If so, are you interested in continuing to support them after your death?
- 3) Have you ever thought about what kind of personal legacy you want to create?
- 4) If there were a way to reduce your income or estate taxes that involved a charitable gift, would you be interested in hearing more about it?
- 5) Would you consider arranging for your retirement accounts to pass to charity as a tax-planning strategy?

Foundation Fiscal Year in Review

JULY

Trustee Emeritus Cleve E. Carney passed away. Cleve was one of the Foundation's foremost champions and the driving force behind the Annual Benefit Dinner. He was often referred to as "Mr. DuPage Community Foundation," and in many ways he was "Mr. DuPage." He will be greatly missed.



initiative aimed at ensuring all DuPage County children are prepared to enter kindergarten. The roundtable kicked off the marketing of this initiative which continues to grow each year.

The Foundation's 21st Annual Benefit Dinner was held at Ruth Lake Country Club in Hinsdale. The event was held in honor of our late Trustee Emeritus Cleve E. Carney.

AUGUST

Two new staff members joined the Foundation team, David Weisz, as its director of finance, and Joelyn Kott, as its first marketing & communications officer.



SEPTEMBER

During September, the changing of the guard occurred as Stephen Burt (right) was elected as our new Board chair, and Daniel Maguire concluded his

term in that role. Four new trustees were also welcomed to the Foundation Board: Christopher Janc, Mary Kay Kluge, Bruce Lee, and Nathaniel Wasson.

OCTOBER

A Financial Fitness Program was launched in conjunction with DuPage Habitat for Humanity and Bridge Communities. The program was designed to provide financial literacy training for low to moderate-income families living in DuPage County.

NOVEMBER

A media roundtable was held to introduce the public to "Bright & Early DuPage," the Foundation's primary



The Foundation also marked Community Foundation Week by accepting proclamations throughout DuPage County celebrating the importance of community foundations to our area and DuPage.



Foundation Chair Steve Burt receives a proclamation from County Board Chair Dan Cronin.

DECEMBER



Committee members Joyce Hothan (l.) and Deb duVair (r.)

The Foundation held an holiday open house to celebrate our fall grantmaking activities. More than \$200,000 in grants was awarded to 30 DuPage organizations in the areas of arts and culture, education and the environment as part of our Fall Community Needs Grant Cycle.

A seminar was held at Arrowhead Golf Club in Wheaton on Year-End Investment, Tax and Estate Planning Opportunities for 2013 and Charitable Gift Planning Strategies. Approximately 50 people attended this successful event.

Foundation Fiscal Year in Review

JANUARY



The Foundation was pleased to welcome Betsy Brosnan to the Board.

A new online grant application process was launched for the Spring Community Needs Grant Cycle.

ton/Warrenville. The second grant was awarded to fund a new collaborative, which was formed in Addison.

More than \$337,000 in grants was awarded by the Foundation through our Spring Community Needs Grant Cycle, bringing the total of all grants the Foundation has awarded to more than \$19 million since our inception.

FEBRUARY

Loydeen Reichman joined the Foundation staff as its accounting & administrative assistant.

MARCH

The Foundation surpassed the \$50 million mark in total assets under management.



APRIL

A "Money Smart Week DuPage" event was held in conjunction with the Federal Reserve Bank of Chicago.



Foundation Director of Programs Barb Szczepaniak

MAY

"DuPage All For Arts" was launched as a new initiative of the Foundation. This study is exploring the feasibility of establishing a county-wide arts council.

The Foundation held its Inaugural Legacy Society Luncheon at Butterfield Country Club. The event recognized and honored our special circle of Legacy Society members for their inspiring commitments to philanthropy through their estate plans.

JUNE

Two grants were awarded to Metropolitan Family Services in support of "Bright & Early DuPage." The first grant was to support the continuation of our first early childhood collaborative in Whea-

The Foundation was pleased to host more than 120 friends for three special VIP receptions of the Chicago Symphony Orchestra's Summer Concert Series at The Morton Arboretum. This enchanting three-day series featured the music of several Academy Award-nominated films along with popular works of Beethoven, Dvořák, Mendelssohn and Tchaikovsky. It was sponsored in part by a generous grant from the JCS Fund of The DuPage Community Foundation (photo below).



In Memory ...

During the fiscal year, we lost several dear Foundation friends. We remember and dedicate our work to their memory.

- Rev. Howard Benson
- Cleve Carney
- Douglas Mains
- Ramon Mulholland
- Jean Neill
- Nancy Sindelar
- Dianne Skeet
- Dorothy White



Grantmaking Process

The Foundation's Community Needs Grant Program has evolved over the years into a program that is efficient, responsive and strategic.

Through the Community Needs Grant Program, local not-for-profits can apply for grants in one of four categories: Arts and Culture, Education, Environment, and Health and Human services. The health and human services applications are accepted during the spring grant cycle, and arts and culture, education and environment requests are accepted in the fall.

The Grant Committee, comprised of Foundation trustees and community members, carefully analyzes requests and makes recommendations to the Board as to which organizations should be funded and at what level support should be given.

"It's a complex process because there are many local organizations that are well-deserving of grants to support their programs," said Barb Szczepaniak, director of programs for the Foundation. "Applicants put a lot of time and energy into preparing their grant applications, and one of the hardest parts of my job is telling them why we weren't able to fund their request. Often the reason is simply due to the limited funds available."

To expand the impact of the Foundation's grantmaking, the Grant Committee provides to our donor-advisors a list of applications that have been received. While the Grant Committee is reviewing applications, donor-advisors also have the opportunity to review applications that pique their interest and to recommend grants from their donor-advised funds for programs they wish to support.

"This is a fantastic way to educate our donor-advisors about the current needs in the community, to engage them in the Community Needs grant

process, and to expand the overall number and dollar amount of the grants that we can award in response to the requests received. It's truly a win-



Types of Grants

Community Needs grants were funded from earnings on the following permanent endowment funds which have been established by corporations, foundations, individuals and organizations wishing to make a lasting contribution to the people of DuPage County:

Unrestricted Funds

- Cleve E. Carney Fund
- Lois L. and Edwin F. Deicke Fund
- Elizabeth D. Eben Memorial Fund
- General Endowment Fund
- Alan D. and Jane M. Hoffmann Fund
- Joseph and Bess Kindlon Fund
- Jack and Virginia Knuepfer Fund
- John W. Squire Fund

Field-of-Interest Funds

- Access to Recreation Fund
- Arts Fund
- Basic Human Needs Fund
- The Alben F. Bates and Clara G. Bates Foundation Fund
- Children and Youth Fund
- Ruth and Hugh Christ Fund
- Environmental Fund
- Health Fund
- Martha McCormick Hunt Fund
- Wesley E. Luehring Foundation Fund
- Sindelar Family Fund

win for everyone," said Szczepaniak.

In response to Community Needs grant applications received during fiscal year 2014, donor-advisors fully funded the following **15 grants** totaling **\$101,938**.

Addison Center for the Arts **\$3,500**

(Funded by the JCS Fund)

For Arts Alive: An After-School Program which is designed to foster the development and love of music, theater and visual arts for middle school students.

Anima - Young Singers of Greater Chicago **\$7,500**

(Funded by the Conrad and Doris Brassine Charitable Fund)

To support the Community Engagement initiative that brings unique music-making and education opportunities to youth and families through several collaborative community concerts.

Bluestem Housing Partners \$2,500

(Funded by the Edward and Minnie Ceragioli Fund)

To develop a community garden for low-income disabled residents in Lombard.

Chicago Sinfonietta \$11,000

(Funded by the JCS Fund)

To support a five-concert professional orchestra's season at North Central College's Wentz Concert Hall as well as a series of community engagement concerts.

Cosley Zoo/Cosley Foundation \$2,500

(Funded by the Conrad and Doris Brassine Charitable Fund)

To support the development of Animal and Nature Education Boxes to be used as curriculum tools and resources in the areas of science relating to animals, nature and worldwide conservation.

DuPage County Historical Museum Association \$5,000

(Funded by the History DuPage Fund and the Conrad and Doris Brassine Charitable Fund)

To support the "DuPage County 175 years of History" exhibit and the related lecture series.

DuPage Workforce Board \$2,500

(Funded by the Snodgrass Family Fund)

To support the DuPage Manufacturing and Engineering Technology Expo, which is designed to promote interest among high school students in the multiple career opportunities in this growing sector.

Loaves & Fishes Community Services \$15,000

(Funded by the Betty M. Bock Fund)

To support the purchase of a supermarket "open showcase" refrigeration system which will enable them to distribute 12,000-15,000 pounds of nutritious, fresh food options each week.

National Louis University \$10,000

(Funded by the Snodgrass Family Fund)

To support a year-long series of workshops focused on serving the veteran community and assisting in their transition into civilian life.

Outreach Community Ministries \$5,000

(Funded by the Snodgrass Family Fund)

To support a year-round Youth Employment Program for up to 25-30 local economically-disadvantaged out-of-school youth, ages 16-21, who lack necessary job skills to successfully enter the job market.

Project HELP \$2,500

(Funded by the Betty M. Bock Fund)

To support and expand the Parent Mentoring Program, which provides in-home parent mentoring for families at risk of child maltreatment.

Repeat Boutique \$2,438

(Funded by the Snodgrass Family Fund)

To support a marketing campaign to increase community awareness and sensitivity to the organization's needs.

Sharing Connections \$7,500

(Funded by the Betty M. Bock Fund)

To support services for 4,600 low to extremely low-income DuPage residents (including battered women, veterans, previously homeless, teen moms) to acquire the most basic household furniture and related items.

Special Kids Day \$5,000

(Funded by the Andi Stelzner Fund)

To support a December holiday party for families who have children with special needs.

Stepping Stones for Women of Domestic Violence \$20,000

(Funded by the Betty M. Bock Fund)

To provide housing and expense support (e.g., transportation, auto, food, furnishings and child care) for women of domestic violence who have children.

Other donor-advisors partially funded two additional grants totaling **\$2,500** which are described in the list of Community Needs Grants on the next few pages.

Community Needs Grant Recipients

*Denotes mini-grant

Arts & Culture

Acappellago*

\$2,500

To replace music archives which were lost in an April 2013 flood.

Community School of the Arts, Wheaton College

\$7,500

To fund salaries for weekly music classes and semi-private violin and recorder lessons at West Chicago District 33 and World Relief DuPage Preschool.

Downers Grove Choral Society*

\$2,500

To support two concerts featuring special guest conductors.

DuPage Symphony Orchestra*

\$2,500

To support educational outreach programs for students in Indian Prairie School District 204.

Elmhurst Art Museum

\$10,000

To advance educational programs and create a holistic approach to integrate art education, exhibitions and McCormick House programs.

Glen Ellyn-Wheaton Chorale*

\$2,000

To defray the cost of the purchase of new music and performance permissions.



Salt Creek Ballet

\$8,000

To support the production of new sets and costumes for *The Nutcracker*, the organization's major vehicle for delivering opportunities for participation, education, awareness and appreciation of the arts.

(Photo, left)

Senior Suburban Orchestra*

\$2,500

To support outreach concerts to the musically underserved.

Spirito! Singers*

\$2,500

To support the Ragazze choral training ensemble for 5th through 8th-grade girls to expand music education, awareness, and performance experience.

Wheaton Band Festival*

\$2,000

To support a two-day band festival that will include an interactive opportunity for children to try various instruments.

Young Naperville Singers*

\$2,500

To support three spring concerts and an honor choir festival that will include a world-renowned composer and conductor.

11 Arts and Culture Grants:

\$44,500

Education

The Community House \$12,000

To provide educational and recreational programming, in a safe and nurturing environment, for the at-risk children and families who reside in the Willowbrook Corner neighborhood.

Dare to Dream: Get Educated! \$8,385

To cover the costs of videography, two scholarships, and breakfast for 600 attendees of the annual Dare to Dream conference which focuses on the value of higher education. *(Photo, right)*



Glen Ellyn Children's Resource Center \$10,000

To support the after-school and summer literacy and life-skills program which help low-income children develop English language, functional literacy and socialization skills.

Lizzadro Museum of Lapidary Art* \$2,500

To support the Museum's Educational Services and Outreach programs.

North Central College \$4,800

To support a six-week summer camp in which college students majoring in education provide instruction in reading, writing and math to academically at-risk students at an elementary school in Addison.

Ray Graham Association for People with Disabilities \$10,000

To support the Monarch Academy and Monarch II programs which help teach young adults independent living skills.

Robert Crown Center for Health Education \$7,822

To support the pilot implementation and evaluation of the "Heroin Use Primary Prevention Program" at a Naperville middle school.

The Salvation Army Family and Community Services \$10,000

(Funding from Communityworks Endowment)

To support the salary of a loan coordinator for the Ways to Work program, which provides financial education, case management and micro-loans to low-income families helping them to purchase a car to get to school and work. *(Photo, right)*



8 Education Grants: \$65,507

***Denotes mini grant**

Environment

Marianjoy Rehabilitation Hospital

\$20,000

To replace a current retention pond with an environmentally-sustainable rain garden providing a more enlightened approach to stormwater management while enhancing the holistic, healing setting of the hospital campus.

The Morton Arboretum

\$10,000

For the Macgyver program and its companion Counselor in Training program which is designed to increase science literacy, nature appreciation and career modeling and mentoring for middle and high school student volunteers.

The Wetlands Initiative

\$20,000

For year one support of a multi-year project to restore a high-quality stream environment, the adjacent native wetland and upland habitats within the Blackwell and St. James Farm forest preserves.

3 Environmental Grants:

\$50,000

Special Initiative

The Conservation Foundation

\$2,000

To sponsor the 2014 DuPage Environmental Summit.

DuPagePads

\$1,000

(Recommended by Janet Rae Montgomery of Daluga Boland & Montgomery, LLC at the DuPage Estate Planning Council's September 2013 meeting)

To support general operations.



DuPage Homeownership Center

\$15,000

To match funds received by DuPage Homeownership Center in support of their Financial Fitness Program.

DuPage Social Services

\$4,000

To assist low-income families who were victims of a Lombard apartment fire in which all their belongings were lost.

Northern Illinois Food Bank

\$1,200

To support a mobile food pantry in Addison. *(Photo, left)*

President's Special Initiative Grants

\$2,350

Grants directed to local not-for-profits by the Foundation staff.

Woodridge Jaycees

\$23,500

(Funded by the General Endowment Fund; multiple donor-advised funds including the Phil and Judy Barnett Family Fund, Beles Family Fund, Companions' Fund, Doyle Family Fund, Beth and Dan Maguire Family Fund, Mulholland Family Fund, Naccarato Family Fund, Shebik Family Fund for Basic Human Needs, Silver Heart Foundation and Snodgrass Family Fund; and a direct gift from Mr. and Mrs. Willis Gillett.)

To assist low-income families who were victims of an apartment fire in which all of their belongings were lost.

7 Special Initiative Grants:

\$49,050

Health & Human Services

360 Youth Services

\$15,000

To support operating expenses in the DuPage Transitional Living program for homeless youth ages 18-21.

Care for Cars

\$10,000

(Partially funded by a pass-through gift from the McWethy Foundation)

To support the automotive repair program, which helps low-income individuals maintain reliable transportation enabling them to get to and from work.

CASA of DuPage County, Inc.

\$20,000

To provide court-ordered child advocacy to more than 350 children who, through no fault of their own, find themselves in the DuPage County juvenile court system due to abuse, neglect and dependency.

Catholic Charities Diocese of Joliet

\$20,000

To provide emergency assistance to and case management services for 2,220 low-income individuals and families in DuPage County who are homeless or at risk of homelessness.

Community Adult Day Care*

\$2,500

To offer quarterly paid programs and to purchase new activity materials and equipment for the benefit of adults suffering from dementia.

DuPagePads

\$20,000

To employ a case manager who will engage families, link them to support services, and help them develop long-term housing plans.

Easter Seals DuPage & Fox Valley

\$19,968

To provide critically needed early intervention services to children with developmental disabilities who do not meet the 30% or greater delay criteria that would qualify them for Federal Early Intervention and school-based services.

Ecumenical Adult Care*

\$2,400

(Partially funded by the Edward and Minnie Ceragioli Fund)

To provide life-enriching programs to frail elderly participants in the adult day services program.

Elmhurst/Yorkfield Food Pantry

\$10,000

To purchase refrigeration and freezer equipment to expand service capacity for low-income families in eastern DuPage County.

Exodus World Service

\$7,500

(Partially funded by the Silver Heart Foundation Fund)

To support the Program Team at Exodus by hiring a staff member through Amate House who will help mobilize volunteers to welcome newly-arrived refugees in DuPage County.

Family Shelter Service

\$20,000

To support the Group Counseling Program which provides counseling services to victims of domestic violence and their children.

Glen Ellyn Food Pantry	\$11,250
To purchase a freezer and refrigerator and other equipment to assist with food recovery.	
Kiwanis Club of Wheaton	\$15,000
To purchase universally-accessible playground equipment for 5-12 year-old children at the Sensory Garden Playground.	
LOVE Christian Clearinghouse	\$10,000
To provide rent, utility and car repair assistance to individuals experiencing an unexpected, temporary, financial set-back.	
Metropolitan Family Services DuPage	\$12,500
To support salaries and other operating expenses associated with the supervised mentoring program that matches low-income, at-risk youth in grades 1-8, with screened and trained adult mentor volunteers.	
Midwest Shelter for Homeless Veterans	\$15,000
<i>(Partially funded by the Communityworks Endowment Fund)</i>	
To support a comprehensive program to help homeless and at-risk low-income veterans overcome barriers to employment and regain self-sufficiency.	
Neighborhood Food Pantries	\$10,300
To support the purchase of a truck for the food recovery program.	
Parents Alliance Employment Project	\$6,000
<i>(Partially funded by the Communityworks Endowment Fund)</i>	
To support the salary of an employment specialist for the career development and job readiness program for high school students with disabilities.	
Samaritan Interfaith Counseling Center	\$15,000
To support mental and behavioral health education, assessment and counseling services for clients who live at or below the Federal Poverty Level.	
Serenity House Counseling Services, Inc.	\$5,000
To provide peer-to-peer substance abuse education/awareness in DuPage County schools through the use of young speakers who share their recovery experience as a prevention tool.	

Teen Parent Connection **\$20,000**
 To support the Adolescent Family Strengthening programs that provide a continuum of parenting support, education and resources to adolescent parents in DuPage County. *(Photo, right)*

Youth Outlook **\$10,000**
 To support LGBTQ youth with direct wellness services, and to provide youth-serving adults with presentations and workshops that address safety, tolerance, discrimination, and bullying.



22 Health & Human Services Grants:

\$277,418

Financial Highlights

Growth

The Foundation has seen unparalleled growth in its assets, contributions and grants during the past five years.

ASSETS

FY 2010	\$30,983,865
FY 2011	\$37,231,568
FY 2012	\$40,145,804
FY 2013	\$47,016,028
FY 2014	\$59,537,304

ASSETS

CONTRIBUTIONS

FY 2010	\$5,004,348
FY 2011	\$2,583,720
FY 2012	\$6,321,390
FY 2013	\$4,603,110
FY 2014	\$9,090,740

CONTRIBUTIONS

GRANTS

FY 2010	\$1,038,781
FY 2011	\$1,441,019
FY 2012	\$1,883,775
FY 2013	\$2,360,061
FY 2014	\$3,095,458

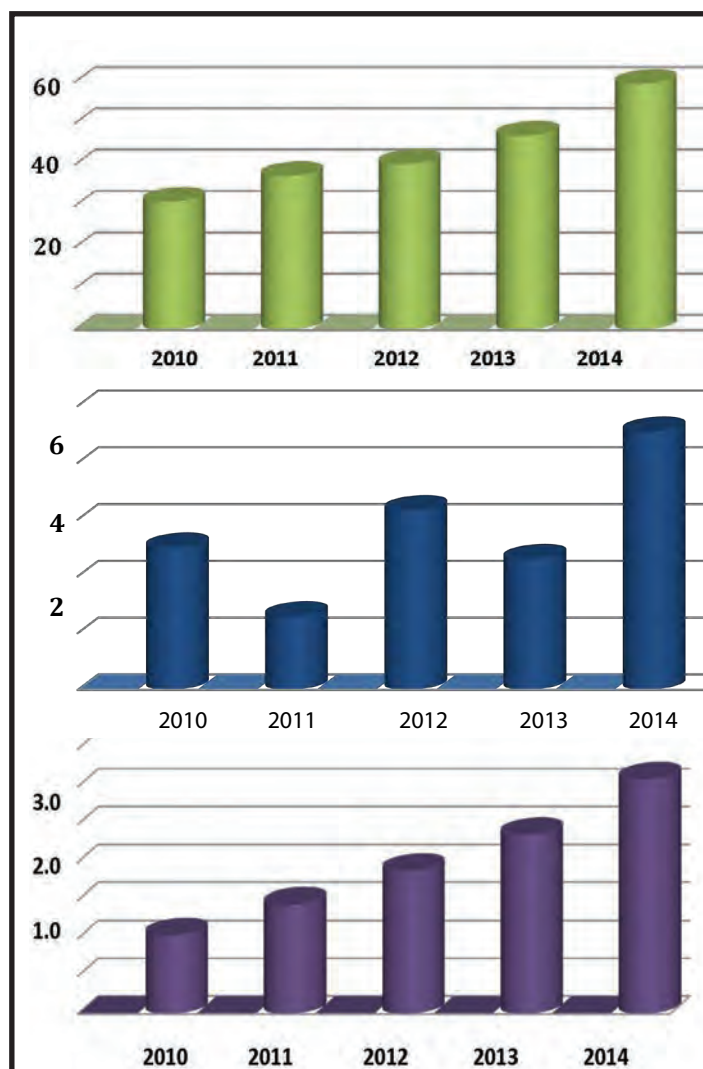
GRANTS

ASSETS

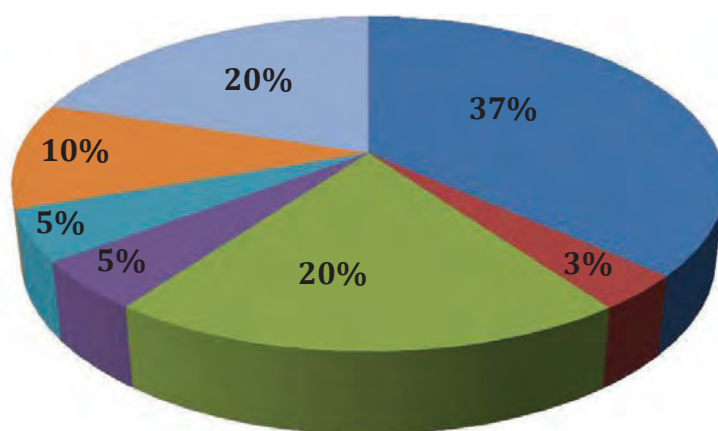
During the fiscal year ending June 30, 2014, The DuPage Community Foundation reached more than \$59 million in assets. Below is a look at how those assets break down by fund type.

- Donor-Advised
- Field of Interest
- Unrestricted
- Operating
- Scholarship
- Agency Partner
- Designated

in millions of dollars



Fiscal Year 2014 Assets By Fund Type



Financial Position

Assets (as of June 30, 2014)

	2014	2013
Cash and Cash Equivalents - Unrestricted	\$284,177	\$141,829
Cash and Cash Equivalents - Restricted	2,548,947	2,851,049
Total Cash and Cash Equivalents	<u>\$2,833,124</u>	<u>\$2,992,878</u>
Administrative Fees Receivable	114,109	95,854
Prepaid Expenses and Other	26,097	16,898
Charitable Lead Trust	229,368	219,239
Investments	55,753,391	43,064,582
Reinsurance Contract	154,374	183,426
Property and Equipment, Net	426,841	443,151
Total Assets	\$59,537,304	\$47,016,028

Liabilities and Net Assets (as of June 30, 2014)

	2014	2013
Liabilities:		
Accounts Payable and Accrued Expenses	\$11,531	\$18,859
Agency Funds	11,929,528	9,875,958
Annuities Payable	195,637	212,791
Total Liabilities	\$12,136,696	\$10,107,608
Net Assets:		
Unrestricted	8,190,490	5,108,639
Temporarily Restricted	7,628,500	4,237,714
Permanently Restricted	31,581,618	27,562,067
Total Net Assets	\$47,400,608	\$36,908,420
Total Liabilities and Net Assets	\$59,537,304	\$47,016,028

Statement of Activities

	Unrestricted	Temporarily Restricted	Permanently Restricted	2014	2013
Support and Revenue:					
Gifts, Bequests, and Grants	\$2,629,542	\$2,135,972	\$4,145,226	\$9,090,740	\$4,603,110
Interest and Dividend Income	126,057	596,920	—	722,977	686,524
Net Investment Gains/Losses	838,086	4,035,915	—	4,874,001	2,458,745
Fees	108,234	—	—	108,234	83,250
Rental Income	—	—	—	—	28,635
Net Assets Released From Restrictions	<u>3,683,696</u>	<u>(3,558,021)</u>	<u>(125,675)</u>	<u>—</u>	<u>—</u>
Total Support and Revenue	<u>\$7,385,615</u>	<u>\$3,390,786</u>	<u>\$4,019,551</u>	<u>\$14,795,952</u>	<u>\$7,860,264</u>
Expenses:					
Grants Awarded	\$3,095,458	—	—	\$3,095,458	\$2,360,061
Grantmaking Activities	712,464	—	—	712,464	566,505
Management and General	261,111	—	—	261,111	222,049
Fundraising	<u>234,731</u>	<u>—</u>	<u>—</u>	<u>234,731</u>	<u>231,269</u>
Total Expenses	<u>\$4,303,764</u>			<u>\$4,303,764</u>	<u>\$3,379,884</u>
Increase (Decrease) in Net Assets	\$3,081,851	\$3,390,786	\$4,019,551	\$10,492,188	\$4,480,380
Net Assets, Beginning of Year	<u>\$5,108,639</u>	<u>\$4,237,714</u>	<u>\$27,562,067</u>	<u>\$36,908,420</u>	<u>\$32,428,040</u>
Net Assets, End of Year	<u>\$8,190,490</u>	<u>\$7,628,500</u>	<u>\$31,581,618</u>	<u>\$47,400,608</u>	<u>\$36,908,420</u>

The fiscal year 2014 audit for The DuPage Community Foundation was performed by Wolf & Company LLP. These summarized financial statements are condensed from the audited statements which are available on the Foundation's website.

**** Certain 2013 amounts have been reclassified to conform with the 2014 financial statement presentation. 2013 net assets and changes in net assets are unchanged due to these reclassifications.***

Legacy Society

Many people wish to make a difference in their community that will last in perpetuity. The Legacy Society of The DuPage Community Foundation provides a meaningful way to recognize those individuals now for gifts that will become effective in the future. You can **create a lasting legacy** through a will, living trust, charitable remainder trust, charitable gift annuity, insurance policy, or qualified retirement plan. The DuPage Community Foundation's role is to receive, administer and provide ongoing stewardship of estate gifts to carry out our donors' intentions.

**remembered*

Anonymous (65)

Phillip and Judith Barnett
Phil and Judy Barnett Family Fund

Rev. Howard C.* and Shirley* Benson
Shirley and Howard Benson Fund

Herbert J. Bock*
Betty M. Bock Fund

Jerry* and Betty Bradshaw
Megan Bradshaw Memorial
Scholarship Fund

Steve and Emily Burt

Cleve E. Carney*

Linda Carpenter
Linda and Clark G. Carpenter Fund

Susanne S. Cassell
Maple Street Chapel Endowment Fund

Hugh* and Ruth* Christ
Ruth and Hugh Christ Fund

Donald T. Dennerlein
Donald T. Dennerlein Fund

Burton E.* and Patricia A. Ericson
Burton E. and Patricia A. Ericson
Family Fund

Douglas G. and Lynn* Eyles
Gene Ball Eyles Fund

James Gates*
Health Fund

Leonard J.* and Barbara Giblin

George N. and Cheryl Gilkerson Jr.

Willis M. Gillett

Jane Henderson*
Rotary Club of Lombard Endowment
Fund

Alan D. and Jane M. Hoffmann
Alan D. and Jane M. Hoffman Family
Fund

Elizabeth L. Jens*
Mental Health Association of DuPage
County Endowment Fund

Melvin E. and M. Joyce Johnson
Melvin E. and M. Joyce Johnson Fund

Arthur J.* and Mary* Kolar
John and Elsie, Mary and Arthur Kolar
Endowed Fund

Richard and Mary Kuhn

Susan M. and Richard J. Lamb
Susan and Richard Lamb Charitable
Fund

Paul J. and Coleen Lehman
General Endowment

Estate of Grace Lopatka*
General Endowment

Daniel and Beth Maguire

David M. and Mary A. McGowan

Mr. and Mrs. Charles M. McKenna

Robert* and Laurie McMahon
Robert and Laurie McMahon Family
Fund

Jack and Kathleen Mensching
General Endowment Fund

William Mitchell
Naperville Education Foundation

Dr. Joseph S. and Joan S. Morrissey
Morrissey Family Fund

Ernest J. and Diane M. Mrozek

Karl W. and Jeanne M. Mueller
Andy Mueller Memorial Fund

Ramon A. Mulholland*
Mulholland Family Fund

Charlotte Mushow
Mushow Fund for Human Services

Jean Neill*
Lewis E. and Jean C. Neill Fund

Timothy J. Newmann
Janice Newmann Memorial Scholarship
Fund

Ellen Noth

Jeff and Alyse S. Pleiter
Pleiter Family Fund

Steven J. and Laurie Reitman

Albert A. and Mimi Rose

Michael J. Schroeck
Michael J. Schroeck Fund

F. Ron and Carol Seager
Seager Family Foundation Fund

Steven and Megan Shebik
Shebik Family Fund for Basic Human
Needs and History DuPage Fund

Nancy E. Sindelar*
Freedman/Sindelar Family Fund

Dianne Skeet*
Donald and Dianne Skeet Fund and
Donald and Dianne Skeet Scholarship
Fund

James M. and Ruth Ann Snodgrass
Snodgrass Family Fund

John W. "Bill" Squire*
General Endowment Fund and annual
grants to Glen Ellyn Food Pantry, Glen
Ellyn Walk-in Ministry, People's
Resource Center, and St. Mark's
Episcopal Church

Stanley Y.* and Claudia Starrett
Starrett Family Fund

David Stelzner and Nicki Krafft
Andi Stelzner Fund

Dr. Lenora Su

Daniel and Adele Szymanski
Szymanski Family Fund

Charlie A. Thurston

Theodore M. Utchen

Mary Eleanor and James Wall
Mary Eleanor and James M. Wall Fund

Donald* and Dorothy* White
B.R. Ryall Designated Fund and General
Endowment Fund

Creating A Lasting Legacy

Since its inception, the Foundation's Legacy Society has grown to more than 120 individuals and couples and represents tens of millions of dollars in commitments.

Each Legacy Society member has his or her own story. Here are a few of them. What's yours?

Alan and Jane Hoffmann

As Legacy Society members, the Hoffmanns have made provision for a percentage of their estate to benefit the following organizations:

- Evangelical Free Church of Naperville
- The Conservation Foundation
- The DuPage Community Foundation's General Grant Program
- Friends for Therapeutic Equine Activities
- Hooved Animal Humane Society
- Humane Haven Animal Shelter



Dianne Skeet

Prior to Dianne's passing in March 2014, she made provision in her estate plan for an extraordinary gift to the Foundation, the largest in our 28-year history. Her gift established the Don and Dianne Skeet Fund to benefit children and the Donald and Dianne Skeet Scholarship Fund, to benefit students of Glenbard East High School.

John W. "Bill" Squire

Bill Squire established the John W. Squire Fund to support the following agencies:

- Glen Ellyn Food Pantry
- Glen Ellyn Walk-In Ministry
- People's Resource Center
- St. Mark's Episcopal Church
- A variety of causes throughout DuPage County.

Are You a Future Legacy Society Member?

The Legacy Society recognizes friends of our community who have made commitments through the Foundation to ensure that their charitable impact will continue after their passing. Planned gifts through a will, living trust, charitable remainder trust, charitable gift annuity, insurance policy or qualified retirement plan can guarantee that the causes and organizations you care about will remain supported after your death.

The Foundation is the perfect vehicle through which to accomplish a planned gift because we specialize in receiving, administering and providing ongoing stewardship of such gifts to ensure that your intentions are honored after your death.

If you wish to be listed as a Legacy Society member, please contact us at (630) 665-5556 so we can acknowledge your generous commitment and encourage others to recognize their own potential for making a lasting difference.

Please refer to page 22 for a complete listing of our Legacy Society members.

Please Remember Us In Your Estate Plan

When making or updating your will, please consider a gift to The DuPage Community Foundation. Consult your estate planning attorney who can assist you in adding one of the following paragraphs to your will:

"I hereby give and bequeath \$_____ to The DuPage Community Foundation to be used (for its general purposes) (for {specific purpose})."

OR

"I hereby give, devise and bequeath (the residue) (____% of the residue) of my estate to The DuPage Community Foundation to be used (for its general purposes) (for {specific purpose})."

If you are leaving the proceeds of an insurance policy or IRA assets to The DuPage Community Foundation, be sure to indicate this on the insurance or IRA beneficiary forms and not in your will because the insurance proceeds or IRA assets will be disposed of by the terms of the insurance policy or IRA document and not your will.

Sunday Is Family Day For The McKennas

"You can't help but admire the commitment of Dave McGowan and the professional staff of The DuPage Community Foundation," said Charlie McKenna, Trustee with the Foundation. "The Trustees and the Committee members are great people, and I'm enjoying working with them."

Charlie and his wife, Kathleen, both serve on a number of local not-for-profit boards. The Board of the Foundation is committed to a strategic plan, but more importantly, they are proactive and actually execute the plan and use it for development," said Charlie. "Very few boards actually execute their plan as proactively as The DuPage Community Foundation. And it's working for us."

The McKennas recently became members of the Foundation's Legacy Society. "We are long-time Wheaton residents and we're interested in philanthropy," said Charlie. "We joined the Legacy Society because we wanted to establish an ongoing commitment to give back to our neighbors and the community where we live and have raised our children," said Kathy.

The McKennas hope that others will consider joining the Foundation's Legacy Society. "This program offers a perfect opportunity for leaving a legacy and it allows your commitment to live on in perpetuity," said Kathy.

The McKennas have two adult children, Charlie and Aimee, and five grandchildren, and they all live in Wheaton, keeping their family close.

"We have family dinners on most Sundays. It's what we call 'dine and dash,'" said Kathy. "Everybody comes at 5 p.m. and leaves by 7:15 p.m. Not only do our children and their families join us but we are fortunate that our daughter's in-laws also live in Wheaton. When everyone can make it, there are 17 of us total. It's great fun," said Kathy.

The McKenna home is adorned with family photos in just about every room, along with items that the couple has picked up on their many travels together. "We love to travel," said Charlie. The couple has visited six continents and have plans to visit New Zealand in 2015.

When they are not spending time with family or traveling, both Kathy and Charlie keep very busy. A retired Wheaton-Warrenville South English teacher, Kathy is a realtor with Coldwell Banker. An avid bridge player, she is also a member of the Wheaton Chapter of the Infant Welfare Society of Chicago, a not-for-profit organization that serves the needs of mothers and children.

"We believe in a strong foundation for children before age 10," said Kathy. "The Foundation's initiative for young children (Bright & Early DuPage) is a favorite program of mine."

Charlie was recently involved with "Engage 200," a



Family is important to Kathy and Charlie McKenna. "We have dinner together about 30 Sundays a year," said Charlie. The couple, who have been married for 40 years, adore their five grandchildren. Pictured above are (l. to r.): Sean, Colin, Taylor, Jack and Lily.

strong initiative in Community Unit School District 200 whose goal was to educate the community about the opportunities and challenges in education today.

"The importance of education for everyone in DuPage County, including early childhood development, is vital," said Charlie. "The Foundation's 'Bright & Early DuPage' initiative is providing that to our community where it's needed most."

"I became involved with the Foundation because I believe in its mission, and I'm able to use my expertise to help on the Audit and Investment committees," added Charlie. "It's been a great experience."

Charlie is retired from Crowe Horwath LLP, a public accounting and consulting firm. He currently serves as an independent consultant. He also serves on a number of boards including Metropolitan Family Services, St. Francis High School, Wheaton Bank & Trust, Penske Motor Group and JVA Partners.

"Being involved in the community and the Foundation has made him a better person," said Kathy. "It gives him a great sense of contributing to society and makes him happy. It opens his heart."

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Wheaton



Charles Mueller
Glen Ellyn
Northern Trust



Nathaniel Wasson
Hinsdale
BMO Harris Bank



Joyce Webb
Glen Ellyn
Aon Corporation



Joseph Weidenbach
Naperville
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** denotes non-trustee member*

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Terri Bon*

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Craig Milkint*
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Ralph Smykal**
Charlie A. Thurston
Mary Eleanor Wall
**remembered

The DuPage Community Foundation Staff



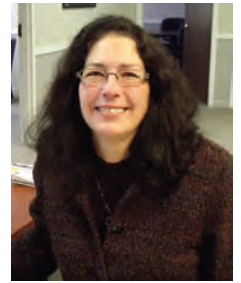
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Development
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Barbara
Szczepaniak
Director of
Programs
Elmhurst



David Weisz
Director of
Finance
Carol Stream

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Become one of our Facebook friends and follow us to be informed and educated on all the news at the Foundation.

@DCFDN

Check out our Twitter feed and get updates to your mobile device.

LinkedIn

Connect with the Foundation and expand your business contacts. Get your Foundation updates here as well.

YouTube

Check out our videos and infomercials. We're looking for Foundation friends to help us out with video testimonials. If you are interested, please contact us at (630) 665-5556.



THE DuPAGE COMMUNITY FOUNDATION



104 E. Roosevelt Road, Ste. 204
Wheaton, IL 60187-5200
(630) 665-5556
www.dcfnd.org



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