CELEBRATING





YEARS 1986 - 2021

ANNUAL REPORT Fiscal Year 2021

Vision: To raise the quality of life throughout DuPage County.

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

DuPage F Foundation F Doing a world of good in our own backyard®

Letter From the Board Chair & CEO

As we celebrate DuPage Foundation's 35th anniversary and reflect on our beginnings, we are inspired by the Foundation's history of tremendous growth, both in assets and charitable impact, made possible by the ongoing support of donors and community partners like you seeking to make a difference in DuPage County.

Without knowing its potential, the Foundation was a dream of three DuPage County residents who banded together 35 years ago and took their passion for helping others to create a vehicle to connect donors to local causes. The Foundation's first exploratory meeting was held on January 15, 1986 titled "Proposed DuPage County Charitable Fund." While there are notes of planning activity in the fall of 1985, this was the first official meeting to discuss creating a community foundation which would operate as a donor-advised fund of The Chicago Community Trust.

What started out as a \$50,000 permanent endowment in 1986 has grown into \$125 million in charitable assets and \$60 million distributed in cumulative grants. The generosity that flows into the Foundation has transcended our mission to raise the quality of life throughout DuPage County and beyond.

In the last fiscal year, the Foundation established 17 new funds, welcomed seven new members to our Legacy Society, and granted almost \$9 million through the *Community Needs Grant Program*, special initiatives, donor-advised grants and designated grants. Through the *COVID-19 Response Fund* that began in FY20, the Foundation deployed nearly \$1.8 million in assistance to the community after additional rounds of grantmaking in FY21.

DuPage Foundation's founders - the late **Jerry Bradshaw**, the late **Brooks McCormick** and **Mary Eleanor Wall** - had a vision to create an environment of community giving. Through their vision and the generous contributions of local philanthropists like you, the Foundation continues to be DuPage County's philanthropic leader and we are proud to celebrate these significant milestones with our community.

They say history repeats itself. If that philosophy holds true, we cannot wait to see what we can accomplish together for our community in the next 35 years. Thank you for supporting DuPage Foundation as we continue to advance our efforts of **doing a world of good in our own backyard.**®

Sincerely,



Joseph L. Weidenbach Board Chair, FY21



David M. McGowan, CFRE President & CEO

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About the cover

On September 30, 1986, The DuPage Community Foundation was officially introduced as the new charitable conduit for DuPage County.





Read about our history and milestones over the last 35 years on page 6.



Fiscal Year 2021 **Board of** Trustees

4



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Members who served July 1, 2020 - June 30, 2021

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Glen Ellyn Fund

Michael Malone^ Adrianne Gregory Phillip Hartweg Joyce Webb

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* Remembered

It's easy to donate! Visit dupagefoundation.org.

Celebrating 35 Years of Raising the

From stepping stones to milestones, the Foundation's humble beginnings have grown into \$185 million in total charitable capital in the last 35 years. With \$60 million in cumulative grants distributed since 1986, the Foundation is poised to have an exponential impact on serving the growing needs of our community.

1986

The DuPage Community Foundation is formally established as a donor-advised fund of The Chicago Community Trust, starting out with a \$100,000 matching challenge grant. An advisory committee of community leaders is appointed to oversee the Foundation.

1992-1993

DuPage Foundation surpasses \$1 million in charitable assets.

1998

The Foundation celebrates \$1 million in grants awarded on behalf of DuPage County.

2007

The Next Generation Initiative is established as a way of endowing our future by cultivating our next generation of philanthropic leaders. The Foundation's assets grow to \$25 million.

2011

The Foundation celebrates its 25th anniversary surpassing \$30 million in assets and \$10 million in cumulative grants. The Legacy Society grows to more than 100 members.

2015

Arts DuPage is launched by the Foundation to support, promote, and advocate for the arts in DuPage County.



_ _ _ _

2020

DuPage Foundation sets up a *COVID-19 Response Fund* and awards nearly \$1.8 million in grants to DuPage not-for-profit organizations.

1987-1988

The Foundation awards its first grant to the DuPage County Historical Society for \$10,000. In 1988, the Foundation awards \$50,000 in grants to six area organizations.

1994

DuPage Foundation separates from The Chicago Community Trust and receives 501(c)(3) status.

2001-2004

The Foundation receives its first million-dollar gifts. After receiving several major gifts, the Foundation's charitable assets total \$15 million.

2010

The Foundation distributes more than \$1 million in grants in a single year for the first time and celebrates awarding more than \$10 million in its history.



2013

Bright & Early DuPage is launched, ensuring that children in DuPage are prepared to enter kindergarten and poised to succeed in life.

2017

The Gustafson Family Foundation makes a landmark investment in DuPage Foundation transferring its nearly \$17 million in assets to create our largest donor-advised fund and cement a longtime partnership. The Foundation surpasses \$70 million in assets and \$30 million in cumulative grants.

2021

The Foundation celebrates its 35th anniversary and surpasses \$125 million in assets and \$60 million in cumulative grants.

e Quality of Life in DuPage County

Within the last four years, the Foundation doubled its charitable impact, distributing \$60 million in cumulative grants, compared to awarding \$30 million in cumulative grants as 2017 came to a close. Since its inception in 1986, the Foundation distributed 8,614 grants to 1,472 not-for-profit agencies serving the residents of DuPage County and beyond.

During the last decade, the Foundation's annual grant distributions have increased from \$1.4 million in 2011 to more than \$8.9 million today.

In 1987, the fifth grant awarded from the Foundation was for \$10,000 to Family Shelter Service (FSS) for a counselor to help victims of domestic violence. FSS is now a program of Metropolitan Family Services DuPage (MFS). During the 2021 spring grant cycle of *Community Needs*, a \$20,000 grant to MFS restricted for FSS is what pushed DuPage Foundation over the \$60 million mark of cumulative grants distributed.

Through the *Community Needs Grant Program*, special initiatives, donor-advised grants and designated grants,

Doubled charitable impact in five years:

\$30 million in grants as of FY16 \$60 million in grants as of FY21

> **\$100,000** Starting grant

> > \$125 Million in assets

the Foundation is committed to supporting local notfor-profit organizations in all areas of service to help DuPage residents in need.

Since 1986: 8,614 grants to 1,472 not-for-profit agencies



During the 1999 grant breakfast, Trustee Emeritus David Aldridge presents a \$2,500 check to Karen Kuchar, former executive director of Family Shelter Service, to support a family-centered counseling program.



Fifteen years later, in 2014, DuPage Foundation's VP for Programs Barb Szczepaniak presents a \$150,000 check to MFS to support the Addison Early Childhood Collaborative.

"

"Part of the Foundation's ongoing strategic plan is to grow our endowment to expand our role as the County's philanthropic leader. With increased capital, the Foundation can broaden the scope of our services, build additional community initiatives and provide greater support to not-for-profit organizations."

-Dave McGowan, DuPage Foundation president & CEO

Community Needs Grant Program

DuPage Foundation's *Community Needs Grant Program* supports programs and projects that improve and enrich the quality of life for DuPage County residents. During two grant cycles each year, applications are accepted from local not-for-profits serving the DuPage County community in five areas of service: health & human services; education; arts & culture; environment; and animal welfare.

Where the Funds Originated

Community Needs grants are funded from earnings on the following permanent endowment funds established by corporations, foundations, individuals and organizations seeking to make a difference in DuPage County:

Unrestricted Funds

- Conrad and Doris Brassine
 Charitable Fund
- Cleve E. Carney Fund
- Lois L. and Edwin F. Deicke Fund
- DuPage Forever Fund
- Elizabeth D. Eben Memorial Fund

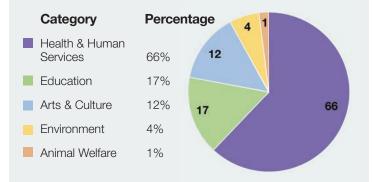
Field-of-Interest Funds

- Abigail Catherine Mueller Children's Fund
- Access to Recreation Fund
- Arts Fund
- Basic Human Needs Fund
- The Alben F. Bates and Clara G. Bates Foundation Fund
- Shirley and Howard Benson Fund
- John J. Bryant Fund
- Children and Youth Fund
- Ruth and Hugh Christ Fund
- Companions' Fund
- Environmental Fund
- Glen Ellyn Fund
- Health Fund
- Martha McCormick Hunt Fund
- John and Elsie, Mary and Arthur Kolar Fund
- Wesley E. Luehring Foundation Fund
- Douglas A. Schooley Memorial Fund
- Sindelar Family Fund
- Donald and Dianne Skeet Fund

- Alan D. and Jane M. Hoffmann Fund
- Joseph and Bess Kindlon Fund
- Jack and Virginia Knuepfer Fund
- John W. Squire Fund

FY21 Grant Total: \$1,066,052

Up 31% from FY20 (total was \$814,421)



Fiscal Year	Grant Total
1988	\$60,000
1999	\$154,000
2010	\$380,650
2021	\$1,066,052

Donor-Advised Funds

Our sincere thanks to the donors and donoradvised fund representatives who recommended grants totaling \$412,213 to support the *Community Needs* program in FY21.

- Andi Stelzner Fund
- Beles Family Fund
- Beth and Daniel Maguire Family Fund
- Betty M. Bock Fund
- Dawn Carol Foundation
- Donor Advised Fund for Needy Children
- Effort Counts Twice Fund
- Harbaugh Family Fund
- History DuPage Fund
- Hynes Family Fund
- JCS Arts, Health and Education Fund
- Johansen Family Fund
- Paul and Dottie Foundation
- Robert and Laurie McMahon Family Fund
- Shebik Family Fund for Basic Human Needs
- Snodgrass Family Fund
- Sue Wallace Fund

Pass-Through Gifts From:

- Alan and Jane Hoffmann
- Betty W. Smykal
- Lorelei Foundation
- Martha Johnson
- Molex

Where the Funds Were Disbursed

In total, 101 not-for-profit organizations applied for Community Needs grants in FY21. By combining Community Needs funding with donor-advised fund grant recommendations, the Foundation funded 72 percent of the proposed projects, for a total of \$1,066,052 in grants distributed.

See dupagefoundation.org/grants for program descriptions.

Health & Human Services:	\$702,860	Best Buddies	\$10,000
360 Youth Services	\$25,000	Candor Health Education	\$10,000
Bridge Communities, Inc.	\$25,000	Career & Networking Center	\$10,000
Care for Cars	\$15,000	Creating IT Futures Foundation Inc.	\$2,500
Caring Network	\$9,300	DuPage Children's Museum	\$20,000
Catholic Charities, Diocese of Joliet	\$25,000	Glen Ellyn Children's Resource Center	\$20,000
DayOne PACT	\$22,000	Green Halo Scholars	\$2,500
Donka, Inc.	\$7,500	H.O.M.E. DuPage, Inc.	\$20,000
DuPage Health Coalition	\$25,000	Inside Out Club DuPage	\$10,000
DuPage Senior Citizens Council	\$19,000	Naperville Heritage Society	\$18,000
DuPage Sponsors	\$25,000	Pathways for Achievement	\$2,500
Elmhurst Walk-In Assistance Network	\$12,000	Re:new Project	\$6,000
Evangelical Child & Family Agency	\$15,000	Tri-Town YMCA	\$20,000
Friends for Therapeutic Equine Activities	\$15,000	Turning Pointe Autism Foundation	\$6,400
Glen Ellyn Food Pantry	\$5,704	Your Children's Bookshelf	\$2,500
Hamdard Center for Health & Human Services	\$25,000		
Healthcare Alternative Systems, Inc.	\$15,000	Arts & Culture	\$125,825
Little City Foundation	\$2,465	b.unity	\$11,000
Loaves & Fishes Community Services	\$25,000	BrightSide Theatre	\$10,000
Metropolitan Family Services DuPage	\$25,000	Chicago Sinfonietta	\$15,000
National Alliance on Mental Illness DuPage	\$25,000	ClaySpace	\$6,000
Neighborhood Food Pantries	\$25,000	College of DuPage Foundation	\$20,000
Northeast DuPage Family and Youth Services	\$25,000	DuPage County Historical Museum Foundation	\$2,500
Northern Illinois Food Bank	\$25,000	Elmhurst Art Museum	\$20,000
Outreach Community Ministries	\$25,000	ESSE Adult Day Services	\$3,825
People's Resource Center	\$21,456	Mandala South Asian Performing Arts	\$2,500
Play for All Playground & Garden Foundation	\$15,000	Opera for the Young	\$2,500
Ray Graham Association	\$24,835	Spirito!	\$5,000
Riverwalk Adult Day Services	\$10,000	Storycatchers Theatre	\$2,500
Sharing Connections	\$20,000	Village of Glen Ellyn	\$12,200
Spectrios Institute for Low Vision	\$6,100	Wheaton Drama, Inc.	\$10,300
Teen Parent Connection	\$20,000	Young Naperville Singers	\$2,500
United Cerebral Palsy Seguin of Greater Chicago	\$25,000		
Wellness House	\$2,500	Environment	\$40,000
West Suburban Community Pantry	\$25,000	The Conservation Foundation	\$20,000
World Relief Chicagoland	\$25,000	The Morton Arboretum	\$15,000
Youth Outlook	\$20,000	Three Fires Council, BSA	\$5,000
YWCA Metropolitan Chicago	\$25,000		
· ~ ~		Animal Welfare	\$16,967
Education	\$180,400	Fetching Tails Foundation	\$14,967
	-		



IY. Greater Chicago Cage Bird Society \$20,000

\$2,000

COVID-19 Response Fund Grants Made in FY21

As FY21 began, many local not-for-profit organizations were dealing with the debilitating effects of the pandemic and faced complete shutdowns. To help organizations stay afloat and pivot to virtual or hybrid operations, DuPage Foundation continued with additional rounds of grantmaking through the *COVID-19 Response Fund*. Since the Fund began in 2020, the Foundation granted nearly \$1.8 million in relief assistance. For a full report, visit dupagefoundation.org/covid19.

Addison Center for the Arts	\$4,047
Alive Center	\$5,000
Anima – Glen Ellyn Children's Chorus	\$15,000
Bensenville Wood Dale Food Pantry	\$10,000
Bridge Communities, Inc.	\$10,000
BrightSide Theatre	\$15,000
Buffalo Theatre Ensemble	\$15,000
Career & Networking Center	\$10,000
CASA of DuPage County, Inc.	\$10,000
Chicago Sinfonietta	\$15,000
ClaySpace	\$15,000
College of DuPage Foundation	\$20,000
D41Kids Foundation	\$20,000
DayOne PACT	\$12,000
Downers Grove Area FISH	\$5,000
Downers Grove Choral Society	\$10,178
DuPage County Historical Museum Foundation	\$15,000
DuPage Federation on Human Services Reform	\$4,940
DuPage Habitat for Humanity	\$10,000
DuPage Health Coalition	\$30,000
DuPage Senior Citizens Council	\$10,000
DuPage Symphony Orchestra	\$20,000
DuPagePads	\$10,000
Educare West DuPage	\$10,000
Elmhurst Art Museum	\$15,000
ESSE Adult Day Services	\$10,000
Evangelical Child & Family Agency	\$5,000
First Folio Theatre	\$20,000
Glen Ellyn Children's Resource Center	\$5,000
Glen Ellyn Youth and Family Counseling Service	\$8,000
Glen Ellyn-Wheaton Chorale	\$8,642
H.O.M.E. DuPage, Inc.	\$10,000
Healthcare Alternative Systems, Inc.	\$10,000
Hinsdale Chorale	\$3,050
Hope's Front Door	\$10,000
Immigrant Solidarity DuPage	\$5,000
KidsMatter	\$15,000
Little Friends, Inc.	\$10,000
Lizzadro Museum of Lapidary Art	\$15,000
Loaves & Fishes Community Services	\$10,000
Metropolitan Family Services DuPage	\$10,000
NAMI DuPage	\$45,000
-	

Naperville Art League	\$14,825
Naperville Chorus	\$12,970
Naperville Men's Glee Club	\$15,000
Northeast DuPage Family and Youth Services	\$8,500
Northern Illinois Food Bank	\$7,146
Ray Graham Association	\$10,000
Reclaim 13	\$5,000
Riverwalk Adult Day Services	\$10,000
Salt Creek Ballet	\$15,000
Spirito!	\$15,000
Student Excellence Foundation	\$10,000
Teen Parent Connection	\$12,340
The Community House	\$15,000
The Salvation Army	\$20,000
The West Towns Chorus	\$12,768
Tri-Town YMCA	\$6,500
United Cerebral Palsy Seguin of Greater Chicago	\$13,224
United Community Concerns Association	\$10,000
Wood Dale Community United Methodist Church	\$5,000
Young Naperville Singers	\$20,000
Youth Jazz Ensemble of DuPage	\$870

Not-for-profit organizations receiving relief in FY21:

(as part of 97 since Fund began in FY20)

Grants in FY21

\$755,000 (as part of \$1.8 million since Fund began in FY20)

"

"We are so grateful for the generosity of the DuPage Foundation for food distribution during the pandemic. This grant impacted hundreds of



families by providing healthy food during an extremely difficult time."

-Mike Havala, president & CEO Loaves & Fishes Community Services

"

"Spirito has been able to survive, thanks in large part to a \$15,000 COVID relief grant received through DuPage Foundation. The grant



enabled Spirito to run live rehearsals the second half of the 20/21 season. It also helped with production costs for our live spring concert in June 2021. Thank you DuPage Foundation for helping us through this challenge and for your unwavering support of the arts."

-Mary Jean Adkins, executive director Spirito! Singers

"

We are grateful for the continued and generous support of the DuPage Foundation. You are indeed doing a world of good in your own backyard and what a lovely yard it is."



-Vicki Sebela, executive director, Student Excellence Foundation (supporting District 200 families)

"The DuPage Foundation's philanthropic leadership makes DuPage County a more vibrant and healthy community.

nealthy community, especially for our neighbors with disabilities! The Foundation provided a \$10,000 grant to provide personal protective equipment for the people we support and the people who support them. When supply chains were critically low, DuPage Foundation reassured hundreds of DuPage residents with disabilities that they are safe in their home and community."

-Kim Zoeller, president & CEO Ray Graham Association

"

"DuPage Foundation's COVID-19 Response Fund was there to propel us forward in every meal we served to



a hungry neighbor, every minute of emergency care we provided to children whose parents were on the front line, and every call we made to check on a senior that was facing social isolation. Your generosity has not just made a moment of change, but a lifetime of difference for everyone across the County – thank you for being the impact of hope during such an uncertain time."

-Sarah A. O'Donnell, CEO Tri-Town YMCA A DuPage Foundation Initiative

BRIGHT & EARLY

Bright & Early DuPage Initiative Sets Model for Illinois Early Childhood Investments

DuPage Foundation's Bright & Early DuPage initiative focuses on ensuring children from birth to age five in DuPage County receive the comprehensive support critical in preparing them for success in kindergarten and beyond.

Before DuPage Foundation's Bright & Early DuPage (B&ED) initiative was created, there was no road map to building successful publicly-funded early childhood programs for underserved children in DuPage County. Today, the success of the initiative has become a model for the state of Illinois thanks in part to Theresa Hawley, PhD, who helped create a comprehensive plan for B&ED and has since pushed for the same development at the state level.



Dr. Hawley presents during a Bright & Early DuPage Committee meeting

In 2003, DuPage Foundation was invited to participate in Grand Victoria Foundation's (GVF) Communityworks initiative, a seven-year, \$12 million initiative

1,699 publiclyfunded preschool seats awarded

57% increase since 2018

1,083 home visiting slots 55% increase since 2018

878 special needs and early intervention referrals

52% increase since 2018

DECC data from 2020

designed to strengthen Illinois community foundations and build permanent endowments to benefit organizations working in three key areas: early childhood care and education, workforce development, and land use and protection.

At that time, Dr. Hawley was a trustee for the Gustafson Family Foundation (GFF), a private foundation focused on serving children, which has since become the largest donor-advised fund of DuPage Foundation. Through that role, she facilitated a \$1 million gift from GFF to take advantage of the GVF match and double their impact to support the Foundation's early childhood endowment.

With a strong endowment in place, the B&ED Committee was created to plan how to best use the annual income generated from the fund. Dr. Hawley had the experience of working to promote early childhood care and education in small communities. She saw success bloom from a greater ownership by local facilitators and encouraged the Committee to invest in local community collaborations. "With her familiarity of the early childhood landscape in DuPage and her expertise on how to best meet the needs of young children and families, Theresa led us on the right track to have the greatest impact with the dollars we had available," said **Barb Szczepaniak**, vice president for programs. "We were truly lucky to have her knowledge of the systems that needed to be put in place and her assistance in building out the attainable goals of the initiative."

"As one of the richest counties in the state, we were now dealing with the implications or the suburbanization of poverty," said Dr. Hawley. "We believed in the power of actually getting folks to work together across all of our different agencies and school districts – and all the players in the community – knowing it was really the most important way to move this work forward."

In 2012, Dr. Hawley became

executive director for the Governor's Office of Early Childhood Development to coordinate state efforts to support early learning in collaboration with state agencies and the Illinois Early Learning Council.

"The biggest success from Bright & Early DuPage is it has massively increased the amount of federal and state dollars coming into DuPage to be able to serve low-income kids with highquality preschool or home visiting services," said Dr. Hawley.

Dr. Hawley stepped away from the B&ED Committee this past year to focus on her role as the early childhood transformation director for NIU, a position created in partnership with the Governor's office.

"Our pitch to the Governor was that we need to transform the way we are financing early care and education and we need to build a system that has the chance of creating a more equitable set of services for kids and families," said Dr. Hawley. "It outrages me and it needs to outrage everyone that in one of the richest counties in the country we find it acceptable somehow that lowincome kids in our County are not allowed to go to preschool because we don't have it for them."

Dr. Hawley said the state is investing in the same kinds of things as B&ED, not as a replacement for the way that foundations and local entities are investing, but as a supplement to build up robustly across the state.

> "Bright & Early DuPage is a model for what's going on at the state level," added Dr. Hawley. "The work that happened in DuPage shows the investment in these communities really did make a difference. It was a really important part of the argument for convincing the Governor and others in state leadership that this was an investment worth making. The example of what's been possible in DuPage is something that inspires a lot of people."

Since the launch of the B&ED initiative in 2013, the Foundation has seeded and supported six early childhood collaborations and the countywide DuPage Early Childhood Collaborative (DECC) that serves as a hub for early childhood in DuPage. Through multiple matching challenges and fundraising opportunities, the B&ED endowment has grown to nearly \$7 million today.

"When we launched this initiative focused on creating real system change, we weren't sure what the community's response would be or the specific impact we would have," said Szczepaniak. "To see how much the early childhood landscape in DuPage has changed and knowing that the state is using our work as a model for early childhood is truly wonderful. Due to the collective vision of Bright & Early DuPage and the hard work of the local collaboratives supported through this initiative, many DuPage children have been put on a path to lifelong success."





Advocate

Arts DuPage secured \$300,000 from DuPage County in funding through the CARES Act for the struggling arts organizations in the community.

Communicator

Arts DuPage sent eblasts on relief funding, emergency resources and critical updates, almost daily, to artists and arts leaders across the County.

Promoter

Arts DuPage adapted the artsdupage.org resource to become the go-to guide for virtual arts and entertainment when activities transitioned to online experiences.

Social Media Expert

Arts DuPage maintained an active community during the pandemic shutdown over the past fiscal year and attracted nearly 60,000 unique users and engaged nearly 22,000 unique users.

Educator

Arts DuPage hosted Zoom happy

hours and workshops for members of the arts community to provide opportunities for arts leaders to share information, exchange ideas and learn from experienced professionals.

Event Coordinator

Arts DuPage retooled October's annual Arts DuPage Month and highlighted artists and happenings through a daily social media campaign.

Connector

Arts DuPage facilitated relationships among artists, venues, performers, events and organizations with opportunities which included key connections made for the highly visible "In Focus" and "Frida Kahlo: Timeless" exhibit.

60,000 unique users attracted

22,000 unique users engaged



The arts were among the hardest hit industries shattered by the impact of COVID-19. At the end of FY21, Arts DuPage posted 220 event listings on artsdupage.org, which was vastly different from FY20's 2,233 events posted. Knowing the arts faced the devastating economic impact of mandated shutdowns, Arts DuPage provided valuable resources to artists and arts leaders to help them remain in

Arts DuPage participated in the second annual

Arts DuPage was selected by Arts Alliance Illinois

Giving DuPage Days campaign and raised

to reach vaccine-hesitant residents.

operation as much as possible during the pandemic.

Fundraiser

\$5.420.

Leader

Photo credit: Martin Luther King Jr. with his wife Coretta Scott King, Summer 1966, Photograph by Bernard Kleina; part of the "In Focus" exhibit at Elmhurst Art Museum

"

"From its inception, Arts DuPage has been an important part of the arts community in DuPage County from promoting local artists to providing workshops for artists and arts organizations in all disciplines. During these uncertain times, Arts DuPage was a vital resource in helping arts organizations survive."

-David M. Rice, executive director First Folio Theatre

ivities s. **60,0**

ates, almost to be among 24 arts leaders recruited for its statewide Arts and Vaccination Campaign, an effort to channel the creative talent of local artists

dupagefoundation.org

Next Generation Initiative DuPage Foundation

More than 15 years ago, DuPage Foundation's Next Generation Initiative (NGI) began with a small group of individuals looking to inspire the next generation of philanthropic leaders to make an impact through their own charitable giving. Today, NGI welcomes members from all different backgrounds and age groups who share a common purpose: to connect, learn and give back as they make a difference in DuPage. Determined to stay connected to each other and further the NGI mission during the pandemic, the NGI Steering Committee planned virtual events as COVID-19 prevented any in-person gatherings during the fiscal year.

NGI FY21 Highlights:



Hosted fourth annual Charity Trivia Night virtually in February, 2021 with 27 teams (200 participants)



Hosted three social events (in July, September, and April) featuring the Foundation's *COVID-19 Response Fund*, Career & Networking Center and Child's Voice

Grants Awarded: \$8,585

Little Friends, Inc. \$1,500



Career & Networking Center \$2,000



Child's Voice \$5,085



Memberships



47 individuals and families joined in

calendar year 2020 and 49 have joined in 2021 as of September, 2021

NGI Endowment

Raised \$31,394 in sponsorships, memberships dues and gifts to defray the cost of NGI events and build the grantmaking endowment 2021 Corporate Sponsor

DuPage Medical Group is now:



Advancement Highlights

 \mathbf{F} undraising and donor stewardship are the cornerstones of a successful community foundation. The Advancement team diligently engages community leaders and educates donors as well as their estate and financial planners.

Welcome Fund Partners

DuPage Foundation is grateful to our many donors and agency partners for their confidence and trust in our stewardship.

NEW FUNDS ESTABLISHED: 17

Agency Endowment & Designated Funds

- Amber's Fund for Bridge Communities, Inc.
- Children Fund of Central DuPage Pastoral Counseling Center
- DuPage Federation on Human Services Reform Agency Fund
- Giving DuPage Agency Fund
- LOVE Christian Clearinghouse Endowment Fund
- SCARCE Endowment Fund

Donor-Advised Funds

- Crompton Family Fund
- Timothy J. and Jodi L. Greene Fund
- Capt. Bernardo lorgulescu, USMC Memorial Fund
- Martha J. Johnson Fund
- Charlie and Kathy McKenna Family Fund
- Summer Oaks Fund
- Rothermel Family Fund
- David K. and Martha Reichert Scatterday Fund
- Thomas R. and Shirley A. Scott Fund

Field-of-Interest Funds

- Mental Health Fund
- Utchen Fund for Persons with Disabilities

Types of Funds

Unrestricted

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.

Field-of-Interest

Allows donors to pool their gifts into common funds to generate perpetual support for a shared area of interest (e.g. the arts, children and youth, the environment, seniors, etc.)

Donor-Advised

Allows donors to streamline their giving and grantmaking through one fund to recommend grants to their favorite causes and charities on their timetable.

Agency & Designated

Provides perpetual support for specific not-for-profits. They can be established by the agency or a donor.

Operating

Supports general Foundation operations.

Remember Us in Your Estate Plan

When making or updating your will, consider a gift to the DuPage Foundation. Consult your estate planning attorney to assist in adding one of the following to your will:

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

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

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

Legacy Society Ensures Future Impact



The DuPage Foundation Legacy Society honors our generous and forwardthinking donors who have included the Foundation in their estate plans. You can ensure your legacy will have a transformational impact on our community for generations to come by naming DuPage Foundation as a beneficiary in your estate plan. We sincerely thank our partners, those listed below, and those who choose to remain anonymous, for their generosity and commitment to our community. Members as of June 30, 2021, are as follows:

Anonymous (94) Cushman L. and Pamela C. Andrews Phillip L. and Judith E. Barnett Howard C.* and Shirley A.* Benson Herbert J. Bock* **Ronald R. Bork*** Jerry C.* and Betty J.* Bradshaw Donald A.* and Jane K. Brooks John J. Bryant* Stephen M. and Emily L. Burt **Cleve E. Carney*** Linda S. Carpenter Susanne S. Cassell* **Ruth* and Hugh* Christ** Edward S. and Shirley J. Crawford **RC and Lorraine Crompton Donald T. Dennerlein** James E. and Marie A. Drasal Lloyd E.* and Mary C.* Eckerson Burton E.* and Patricia A. Ericson Douglas G. and Martha R. Eyles **Diane V. Fox*** Vincent J. and Susan L. Furman James Gates* Leonard J.* and Barbara A. Giblin George N. Gilkerson Jr. Willis M. Gillett Howard G. Goldstein and Margaret A. McGrath

Jane Henderson* Alan D. and Jane M. Hoffmann James M. and Sharon A. Huck Elizabeth L. Jens* Melvin E.* and M. Joyce* Johnson Arthur J.* and Mary* Kolar Kathleen Lamonica Krochock William E. Kronenberg Richard W. and Marv S. Kuhn Richard J. and Susan M. Lamb Paul F. and Eileen M. LeFort Paul J. and Coleen J. Lehman Estate of Grace Lopatka* David M. and Marv A. McGowan Charles M. and Kathleen A. **McKenna** Robert V.* and Laurie K. **McMahon** Jack E. and Kathleen G. Mensching William H. Mitchell Joseph S.* and Joan S. Morrissey Ernest J. and Diane M. Mrozek Karl W. and Jeanne M. Mueller Ramon A. Mulholland* **Gwendolyn S. Mundell Charlotte L. Mushow** Brien J. and Carolyn J. Nagle Jean C. Neill* **Timothy J. Newmann Ellen Noth** Alyse S. and Jeffrey A. Pleiter Steven J. and Laurie Reitman

Albert A.* and Mimi Rose Michael J. and Mary T. Schroeck Thomas R. Scott F. Ron and Carol L. Seager Steven E. and Megan M. Shebik Nancy E. Sindelar* Michael R. and Elizabeth E. Sitrick Dianne M. Skeet* James M. and Ruth Ann Snodgrass John W. "Bill" Squire* David A. Stelzner and Nicki J. Krafft Lenora J. Su, M.D. Daniel R. and Adele M.* Szvmanski Charlie A. Thurston* Mark M. and Barbara L. Turner Theodore M. Utchen* Marv Eleanor and James M.* Wall Donald* and Dorothy B.* White Leslie A. and Mary E. Wiberg Carson R. and Dawn C. Yeager

NEW LEGACY SOCIETY MEMBERS:

- Anonymous (4)
- RC and Lorraine Crompton
- James E. and Marie A. Drasal
- Diane V. Fox*

Ways to Give

One advantage of giving through DuPage Foundation is flexibility. We offer a variety of tax-effective ways to make charitable gifts. Donors may establish or add to a fund with gifts of one or more of the following:

Cash

Qualifies for the maximum allowable income tax deduction.

Marketable or Closely-Held Securities

May be given directly, allowing you to deduct their current market value as a charitable contribution and avoid capital gains tax on the appreciation.

Real Estate

May be given at its current market value allowing a full deduction and avoiding capital gains tax on the appreciation.

Life Insurance

The simplest way to donate life insurance is to designate the Foundation as a policy beneficiary. You can also transfer ownership of a paid-up policy, donate policy dividends, or name us as a policy's designated owner and beneficiary, making annual tax-deductible gifts to us in the amount of any required premium. Under this arrangement, the Foundation would pay the annual premium.

Retirement Plans and Qualified Charitable Distributions (QCDs)

Donors can make contributions from an IRA or other retirement assets such as a 401(k), Keogh, or 403(b). Donors 70½ and older can also make taxfree Qualified Charitable Distributions (QCDs) of up to \$100,000 per individual or \$200,000 per married couple from their traditional IRAs. For donors 72 and older, QCDs can count toward their Required Minimum Distributions (RMDs) while lowering their Adjusted Gross Income. Distributions to any Foundation fund except donor-advised funds will qualify, but must be made directly from the donor's IRA account.

Business Interests, Including Partnerships and Interests in C Corporations, S Corporations, and LLCs

Contributions of privately-held business interests can make highly tax-efficient gifts. You may receive

a charitable deduction for the full fair market value of the donated assets and avoid capital gains tax that would be incurred if the asset was sold. Gifting such assets has requirements and rules that must be followed. Consult your advisors.

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 DuPage Foundation provides a simpler, cost-effective alternative. A donor-advised fund can also be set up at the Foundation to work as a side-car to a private foundation to facilitate grant anonymity when desired, recieve support in the identification and vetting of charitable opportunities, and to provide the potential for more favorable taxdeductibility on new charitable gifts.

Charitable Gift Annuities

In exchange for cash or property, the Foundation pays the donor or beneficiary guaranteed fixed payments for life or a term of years. The size of the payments depends on age; however, a portion may be tax-free. The gift portion of the annuity will be tax deductible.

Charitable Lead Trusts

Charitable Lead Trusts provide income to a Foundation fund for a set number of years, the lives of individuals, or a combination of both as specified by the donor. At the end of that time, the remaining principal of the trust and any accumulated appreciation is distributed to children, grandchildren, or other beneficiaries, often with significant tax savings.

Charitable Remainder Trusts

Donors or beneficiaries such as children and grandchildren or others named by the donors receive income for life or a number of years. At death or term expiration, the remainder passes to the Foundation for the donors' charitable goals.

Why I Give/Why I Refer

Honorable Kenneth Moy Sr. Retired Judge, DuPage County Kenneth Moy Scholarship Fund

"I grew up during a time when prejudice was quite pervasive, so I'd like to help others however I can. It means so much to me that my

support can encourage young people to pursue an advanced education."



Michael and Mary Schroeck Donor-Advisors and Legacy Society Members *Michael J. Schroeck Fund*

"We see our lives being comprised of three phases: Learn, Earn and Return. We have been blessed in so many ways and we are now in our "Return" phase of life. In this regard, we are trying to be very intentional and focused in our giving to support local charities that serve our most vulnerable population. Thankfully, both our estate planning attorney and financial advisor spoke highly of DuPage Foundation, and we've now been involved

with the Foundation for a number of years. We have tremendous respect for DuPage Foundation and we know we can trust it to honor our intent to support our local charities and causes well into the future."



Carson R. Yeager Retired Senior Executive, Northern Trust DuPage Foundation Trustee Emeritus and Legacy Society Member

"The idea that a portion of our estate or an inherited windfall can be donated to create a lasting impact for our community is something we should

all consider. DuPage Foundation is a fantastic partner to help people explore their charitable options and see more impact with their philanthropy."

Susan Reedy Williams, JD Estate Planning Attorney and CPA, Williams & Kite LLC Reedy-Williams Family Fund

"DuPage Foundation has a solid financial backing and experienced management. The Foundation empowers donors to give to the

charities of their choice, knowing their wishes–and their donations– will be managed expertly and honored in perpetuity."



Interested in learning more about how we can help you accomplish your charitable goals? Please contact Alice Wood, JD, Foundation director of gift planning, at alice@dupagefoundation.org or 630.598.5288.

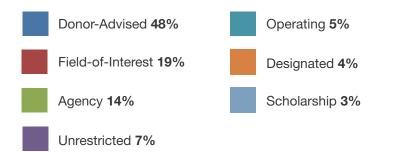


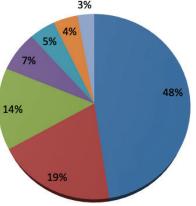
dupagefoundation.org

Statement of Financial Position

ASSETS

Cash and Equivalents Investments Pledges Receivable Charitable Lead Trust Receivable Fees Receivable Prepaid Expenses Cash Value of Life Insurance Other Assets Property and Equipment	June 30, 2021 \$ 1,924,849 121,548,031 287,000 146,057 - 32,094 473,136 73,200 1,218,884	June 30, 2020 \$ 3,856,813 91,286,128 188,211 121,455 153,523 34,299 505,942 - 1,256,145
Total Assets	\$125,703,251	\$ 97,402,516
LIABILITIES AND NET ASSETS		
Liabilities Agency Funds Annuity Payable Accrued Expenses Other Liabilities	\$ 24,401,241 70,586 117,341 -	\$ 18,071,527 90,451 77,653 174,300
Total Liabilities	\$ 24,589,168	\$ 18,413,931
<u>Net Assets</u> Without Donor Restrictions With Donor Restrictions	\$ 16,098,587 85,015,496	\$ 13,463,417 65,525,168
Total Net Assets	\$101,114,083	\$ 78,988,585
Total Liabilities and Net Assets	\$125,703,251	\$ 97,402,516

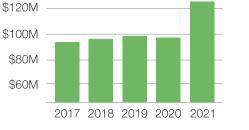




Statement of Activities

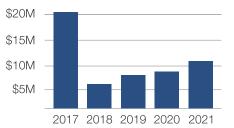
	Without Dono		Total	
Revenue	Restrictions	Restrictions	<u>FY 2021</u>	FY 2020
Gifts, Bequests, and Grants	\$ 1,518,808	\$ 8.703.824	\$10,222,632	\$ 7,769,826
Net Investment Gain	2,844,714	17,912,047		(496,889)
Investment Income	11,676	1,379,923		1,550,159
Fee Revenue	150,648	-	150,648	177,615
Net Assets Released from Restrictions	8,505,466	(8,505,466)	-	-
Total Support and Revenue	\$13,031,312	\$19,490,328	\$32,521,640	\$ 9,000,711
Expenses				
Grants Awarded	\$ 8,658,723	-	\$ 8,658,723	\$ 8,814,664
Grantmaking Activities	596,178	-	596,178	633,058
Management and General	603,719	-	603,719	569,319
Fundraising	537,522	-	537,522	588,222
Total Expenses	\$10,396,142	-	\$10,396,142	\$10,605,263
Increase (Decrease) in Net Assets	\$ 2,635,170	\$19,490,328	\$22,125,498	\$ (1,604,552)
Net Assets - Beginning of Year	\$13,463,417	\$65,525,168	\$78,988,585	\$80,593,137
Net Assets - End of Year	\$16,098,587	\$85,015,496	\$101,114,083	\$78,988,585

Assets



FY17	\$	87,821,181
FY18	\$	94,927,711
FY19	\$	98,928,275
FY20	\$	97,402,516
FY21	\$1	25,703,251

Contributions



\$21,137,341

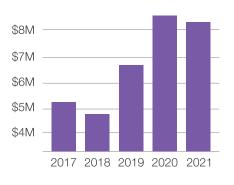
\$ 5,947,801

\$ 7,019,619

\$ 7,769,826

\$10,222,632

Grants



FY17	\$ 5,163,818
FY18	\$ 4,819,615
FY19	\$ 6,756,791
FY20	\$ 8,814,664
FY21	\$ 8,658,723

The fiscal year 2021 audit for the DuPage Foundation was performed by Plante Moran PLLC. These summarized financial statements are condensed from the audited statements, which are available at dupagefoundation.org/financials.

FY17

FY18

FY19

FY20 FY21

DuPage Foundation Highlights of FY2021

First Grant Awarded From The Glen Ellyn Fund



In July, 2020, The Glen Ellvn Fund, DuPage Foundation's newest geographic field-of-interest

fund, awarded its first round of funding to the Glen Ellyn Park District for a new "Sustainable Garden Initiative." The project, proposed by the park district's environmental commission, created two permanent demonstration gardens to inspire and inform visitors to Lake Ellyn and Village Green parks.

Named a Top 25 Foundation in Chicagoland

In August, 2020, DuPage Foundation ranked 23rd on the list of the top 25 Chicagoland foundations, according to Crain's Chicago Business.



Development Officer Kait Balseweicz Honored by WSPN In August, 2020, Kait Balseweicz. development officer. was honored as West Suburban Philanthropic

Network's 2020 Nonprofit Rising Star of the Year.

Dave McGowan a Featured Speaker at Frida **Kahlo Event**



In March, 2021, Foundation President & CEO Dave **McGowan** was a featured speaker at the College of

DuPage Foundation's fundraiser, "For the Love of Frida," an event to support the Frida Kahlo: Timeless exhibit. DuPage Foundation sponsored the exhibit, which ran June - September and brought in an estimated \$8 million to the County.

Renewed Accreditation Status Through Community Foundations National Standards Board



In April, 2021, DuPage Foundation successfully renewed its accreditation status with the Community Foundations National Standards Board, Since 2009, when the program was first developed through the Council on

Excellence. Accountability. Impact."

Foundations, DuPage Foundation has adhered to the operational guidelines set forth in The National Standards for U.S. Community Foundations[®]. The program certifies U.S. community foundations that meet and exceed federal and state law requirements in practice and by policy.

Partnership Launched With the Daily Herald



A partnership between DuPage Foundation and the Daily Herald began in May, 2021, with the launch of an article series titled, "Leaders & Legacies: Stories of Local Impact," to highlight the history behind many beloved

DuPage County treasures and their philanthropic roots. Through her research, Alice Wood, JD, director of gift planning, tells the stories of local people who made a difference by leaving lasting legacies for generations to enjoy.

Foundation Staff

DuPage Foundation staff members share a common purpose of giving back to the community and advancing the work of the Foundation to benefit DuPage County and its residents.



David M. McGowan, CFRE President & CEO *Lisle*



Mindy Saban Director of Communications Darien



Karen L. Vicary Office Manager *Elmhurst*



Kaitlyn M. Balsewicz, CFRE Development Officer *Winfield*



Michael R. Sitrick, JD, CFRE Executive Vice President for Advancement Lombard



David A. Weisz Vice President for Finance Carol Stream



Yusra Javed Chaudhry Graphic Designer Oak Brook



Barbara S. Szczepaniak Vice President for Programs *Elmhurst*



Matt S. Wilson Accounting Associate Westchester



Laura R. Ernst Program Officer Downers Grove



Deborah L. Venezia Director of Arts DuPage Naperville



Alice M. Wood, JD Director of Gift Planning Naperville

"

"Congratulations on a great year! Thank you for all that you and your team did to support so many organizations this past year!"

-Mike Briggs, president & CEO, Little Friends, Inc.

DuPage F Foundation

3000 Woodcreek Dr., Ste. 310 Downers Grove, IL 60515 630.665.5556 dupagefoundation.org

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