CELEBRATING 35 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.
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
Contents

Leadership
Board of Trustees ........................................ 4
Committees ................................................. 5

Celebrating 35 Years
History and Timeline ........................................ 6

Impact of Grant Making
Community Needs Grant Program ................. 8
COVID-19 Response Fund Grants ............... 10

Impact of Initiatives
Bright & Early DuPage .................................. 12
Arts DuPage ................................................. 14
Next Generation Initiative ......................... 15

Connecting Donors to Areas of Need
Welcome New Fund Partners ....................... 16
Types of Funds ............................................. 16
Estate Planning ............................................. 16
Legacy Society ............................................. 17
Ways to Give ................................................ 18
Why I Give/Why I Refer ............................... 19

Financials ..................................................... 20

Community Engagement
FY21 Highlights ........................................... 22
Staff .......................................................... 23

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

Welcome New FY22 Trustees

Officers
Chair
Joseph L. Weidenbach
Naperville
U.S. Bank

Vice Chair
Nathaniel P. Wasson
Hinsdale
Silicon Valley Bank

Secretary
Delrose A. Koch
Clen Glen Ellyn
Clingen Callow & McLean, LLC

Treasurer
Charles E. Saul Jr.
Glen Ellyn
Bank of America
Merrill Lynch (Retired)

Welcome New FY22 Trustees
Timothy D. Elliott
Glen Ellyn
Rathje Woodward
Andrew O. Johnson
Warrenville
Captive Resources LLC
Sahira P. Sadiq
Oak Brook
Islamic Foundation

Trustees
Julius W. (Wes) Becton III
Elmhurst
George Washington Street Partners
William E. Blum
Naperville
Anthony Auto Group
Betsy K. Brosnan
Naperville
Sassetti, LLC
(British)
Betsy Goltermann
Elmhurst
KI Industries
John W. Kaiser Jr.
Glen Ellyn
Cray, Kaiser Ltd.
Mary Kay Kluge
Naperville
Morgan Stanley
(Retired)
Gerald E. Lewis Jr.
Naperville
BMO Harris Bank
Diana L. Martinez
Naperville
Glen Ellyn
Anthony Auto Group
Roger P. McDougall
Glen Ellyn
McAninch Arts Center
Charles B. McKenna
Wheaton
Crowe Horwath, LLP
(Retired)
Paul C. Miles
Naperville
We Raise Foundation
Joan S. Morrissey
Wheaton
(Retired)
James G. Myers
Naperville
Glen Ellyn
Simon/Myers
Dorothy I. O’Reilly
NAPAD
Glen Ellyn
NAMI DuPage
Peter A. Paolilli
Naperville
Altair Advisers LLC
Kevin J. Phillips
St. Charles
Savant Wealth Management
Megan M. Shebik
Naperville
Kemper Insurance
(Retired)
Joyce A. Webb
Glen Ellyn
Thrive

dupagefoundation.org
Fiscal Year 2021 Committee Members

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

Arts DuPage
Dorothy O’Reilly^
Diana Martinez*
Julie Curran
Brian Lynch
John McKinnon
Joan Morrisey
Tony Payne
Sara Phalen
David Rice
Sheila Rutledge
Christina Salerno
James Sheehan
Margaret Sindelar
Robin Tryloff

Executive
Joseph Weidenbach^
Nathaniel Wasson+
Delrose Koch
Charles McKenna
Kevin Phillips
Charles Saul Jr.
Megan Shebik

Bylaws
Delrose Koch^
Megan Shebik+
Norm Beles
Denise Horne
John Kaiser Jr.

Sally Winger

Financial Operations
Charles McKenna^
John Kaiser Jr.*
Matthew Booth
Laurie McMahon
Eugene Ognibene
Peter Paolilli
Charles Saul Jr.

Glen Ellyn Fund
Michael Malone^
Adrienne Gregory
Phillip Hartweg
Joyce Webb

Grant
Megan Shebik^
Roger McDougall*
Dianne Engram
Steven Ewoldt
Betsy Goldermann
Supriya Jasuja

Mary Kay Kluge
Paul LeFort
Gerald Lewis Jr.
Laurie McMahon
Laurie Reifel

Investment
Kevin Phillips^
Braden Waverley*
Daniel Bukowski
Patricia deRosset
Michael Hava
Daniel Maguire
Charles McKenna
Charles Saul Jr.
Steve Shebik

Marketing
James Myers^
Margie Lawless*
Phil Bellini
Matthew Biespiel
Anna Clarke
Dusty Holoubek
Joyce Hoohan
Jill Kerrigan
Paul Miles
Darrien Murphy
Gino Tomaro
Joyce Webb

Next Generation Initiative
Karen Fleming^
Henry Kaskov*
Kate Bousum
Brendan Connolly
J. Amber Drew
Dusty Holoubek
Sara Howland
John Hughes
Derek Johnson
McKenzie Kuhn
Megan Lynch
Juliana Maller
Devon Moon
Luke Widmer

Professional Advisor
Neil Goltermann^
Brandy Harrington+
Sachin Gandhi
William Hassett
Nancy Hermann
Delrose Koch
Brien Nagle
Natalie Perry

Strategic Planning
Ernest Mrozek^
James Myers*
Wes Becton
Deborah du Vair
Denice Gierach
Delrose Koch
Charles McKenna
Joan Morrisey
Megan Shebik
Nathaniel Wasson
Joseph Weidenbach

Board Development
Roger McDougall^
Peter Paolilli*
William Blum
Delrose Koch
Nathaniel Wasson

Bright & Early DuPage
Joan Morrisey^
Joyce Webb*
Sandra Biegel

Betsy Brosnan^
John Kaiser Jr.*
Norman Beles
Betsy Goltermann
Barry Horek
Christopher Janc

Dorothy O’Reilly^
Nathaniel Wasson*
Carol Adams
William Blum
Christine Fenne
Tracy Kreiling
Arca LeFevour
Katelyn Moon
Nathan Ronchetti
Kim Uffig
Cherri Zboril

Bylaws
Delrose Koch^
Megan Shebik+
Norm Beles
Denise Horne
John Kaiser Jr.

Ecological
Delrose Koch
Charles McKenna
Kevin Phillips
Charles Saul Jr.
Megan Shebik

Financial Operations
Charles McKenna^
John Kaiser Jr.*
Matthew Booth
Laurie McMahon
Eugene Ognibene
Peter Paolilli
Charles Saul Jr.

Glen Ellyn Fund
Michael Malone^
Adrienne Gregory
Phillip Hartweg
Joyce Webb

Grant
Megan Shebik^
Roger McDougall*
Dianne Engram
Steven Ewoldt
Betsy Goltermann
Supriya Jasuja

Mary Kay Kluge
Paul LeFort
Gerald Lewis Jr.
Laurie McMahon
Laurie Reifel

Investment
Kevin Phillips^
Braden Waverley*
Daniel Bukowski
Patricia deRosset
Michael Hava
Daniel Maguire
Charles McKenna
Charles Saul Jr.
Steve Shebik

Marketing
James Myers^
Margie Lawless*
Phil Bellini
Matthew Biespiel
Anna Clarke
Dusty Holoubek
Joyce Hoohan
Jill Kerrigan
Paul Miles
Darrien Murphy
Gino Tomaro
Joyce Webb

Next Generation Initiative
Karen Fleming^
Henry Kaskov*
Kate Bousum
Brendan Connolly
J. Amber Drew
Dusty Holoubek
Sara Howland
John Hughes
Derek Johnson
McKenzie Kuhn
Megan Lynch
Juliana Maller
Devon Moon
Luke Widmer

Professional Advisor
Neil Goltermann^
Brandy Harrington+
Sachin Gandhi
William Hassett
Nancy Hermann
Delrose Koch
Brien Nagle
Natalie Perry

Strategic Planning
Ernest Mrozek^
James Myers*
Wes Becton
Deborah du Vair
Denice Gierach
Delrose Koch
Charles McKenna
Joan Morrisey
Megan Shebik
Nathaniel Wasson
Joseph Weidenbach

Trustees Emeriti
David P. Aldridge
Norman J. Beles
Betty J. Bradshaw*
Jerry C. Bradshaw*
Stephen M. Burt
Cleve E. Carney*
Carole J. Cline
Brett M. Dale
Elizabeth D. Eben*
George N. Gilkerson Jr.
Willis M. Gillett
Janet A. Hodge
Joseph F. Kindlon*
Jack T. Knuepfer*
Paul J. Lehman
Daniel Maguire
Brooks McCormick*
Laurie K. McMahon
Vincent A. Naccarato
Nancy E. Sindelar*
Ralph Smykal*
Charlie A. Thurston*
Mary Eleanor Wall
Carson R. Yeager

* Remembered

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

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.

1992-1993
DuPage Foundation surpasses $1 million in charitable assets.

1994
DuPage Foundation separates from The Chicago Community Trust and receives 501(c)(3) status.

1998
The Foundation celebrates $1 million in grants awarded on behalf of DuPage County.

2001-2004
The Foundation receives its first million-dollar gifts. After receiving several major gifts, the Foundation’s charitable assets total $15 million.

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.

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.

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.

2013
Bright & Early DuPage is launched, ensuring that children in DuPage are prepared to enter kindergarten and poised to succeed in life.

2015
Arts DuPage is launched by the Foundation to support, promote, and advocate for the arts in DuPage County.

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.

2020
DuPage Foundation sets up a COVID-19 Response Fund and awards nearly $1.8 million in grants to DuPage not-for-profit organizations.

2021
The Foundation celebrates its 35th anniversary and surpasses $125 million in assets and $60 million in cumulative grants.
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, the Foundation is committed to supporting local not-for-profit organizations in all areas of service to help DuPage residents in need.

“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
- 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**
- 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

**FY21 Grant Total:**

$1,066,052

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

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health &amp; Human Services</td>
<td>66%</td>
<td>Education</td>
<td>17%</td>
</tr>
<tr>
<td>Arts &amp; Culture</td>
<td>12%</td>
<td>Environment</td>
<td>4%</td>
</tr>
<tr>
<td>Animal Welfare</td>
<td>1%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>Grant Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1988</td>
<td>$60,000</td>
</tr>
<tr>
<td>1999</td>
<td>$154,000</td>
</tr>
<tr>
<td>2010</td>
<td>$380,650</td>
</tr>
<tr>
<td>2021</td>
<td>$1,066,052</td>
</tr>
</tbody>
</table>

**Donor-Advised Funds**

Our sincere thanks to the donors and donor-advised 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.

<table>
<thead>
<tr>
<th>Health &amp; Human Services:</th>
<th>$702,860</th>
</tr>
</thead>
<tbody>
<tr>
<td>360 Youth Services</td>
<td>$25,000</td>
</tr>
<tr>
<td>Bridge Communities, Inc.</td>
<td>$25,000</td>
</tr>
<tr>
<td>Care for Cars</td>
<td>$15,000</td>
</tr>
<tr>
<td>Caring Network</td>
<td>$9,300</td>
</tr>
<tr>
<td>Catholic Charities, Diocese of Joliet</td>
<td>$25,000</td>
</tr>
<tr>
<td>DayOne PACT</td>
<td>$22,000</td>
</tr>
<tr>
<td>Donka, Inc.</td>
<td>$7,500</td>
</tr>
<tr>
<td>DuPage Health Coalition</td>
<td>$25,000</td>
</tr>
<tr>
<td>DuPage Senior Citizens Council</td>
<td>$19,000</td>
</tr>
<tr>
<td>DuPage Sponsors</td>
<td>$25,000</td>
</tr>
<tr>
<td>Elmhurst Walk-In Assistance Network</td>
<td>$12,000</td>
</tr>
<tr>
<td>Evangelical Child &amp; Family Agency</td>
<td>$15,000</td>
</tr>
<tr>
<td>Friends for Therapeutic Equine Activities</td>
<td>$15,000</td>
</tr>
<tr>
<td>Glen Ellyn Food Pantry</td>
<td>$5,704</td>
</tr>
<tr>
<td>Hamdard Center for Health &amp; Human Services</td>
<td>$25,000</td>
</tr>
<tr>
<td>Healthcare Alternative Systems, Inc.</td>
<td>$15,000</td>
</tr>
<tr>
<td>Little City Foundation</td>
<td>$2,465</td>
</tr>
<tr>
<td>Loaves &amp; Fishes Community Services</td>
<td>$25,000</td>
</tr>
<tr>
<td>Metropolitan Family Services DuPage</td>
<td>$25,000</td>
</tr>
<tr>
<td>National Alliance on Mental Illness DuPage</td>
<td>$25,000</td>
</tr>
<tr>
<td>Neighborhood Food Pantries</td>
<td>$25,000</td>
</tr>
<tr>
<td>Northeast DuPage Family and Youth Services</td>
<td>$25,000</td>
</tr>
<tr>
<td>Northern Illinois Food Bank</td>
<td>$25,000</td>
</tr>
<tr>
<td>Outreach Community Ministries</td>
<td>$25,000</td>
</tr>
<tr>
<td>People’s Resource Center</td>
<td>$21,456</td>
</tr>
<tr>
<td>Play for All Playground &amp; Garden Foundation</td>
<td>$15,000</td>
</tr>
<tr>
<td>Ray Graham Association</td>
<td>$24,835</td>
</tr>
<tr>
<td>Riverwalk Adult Day Services</td>
<td>$10,000</td>
</tr>
<tr>
<td>Sharing Connections</td>
<td>$20,000</td>
</tr>
<tr>
<td>Spectrios Institute for Low Vision</td>
<td>$6,100</td>
</tr>
<tr>
<td>Teen Parent Connection</td>
<td>$20,000</td>
</tr>
<tr>
<td>United Cerebral Palsy Seguin of Greater Chicago</td>
<td>$25,000</td>
</tr>
<tr>
<td>Wellness House</td>
<td>$2,500</td>
</tr>
<tr>
<td>West Suburban Community Pantry</td>
<td>$25,000</td>
</tr>
<tr>
<td>World Relief Chicagoland</td>
<td>$25,000</td>
</tr>
<tr>
<td>Youth Outlook</td>
<td>$20,000</td>
</tr>
<tr>
<td>YWCA Metropolitan Chicago</td>
<td>$25,000</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Education</th>
<th>$180,400</th>
</tr>
</thead>
<tbody>
<tr>
<td>B.R. Ryall YMCA of Northwestern DuPage County</td>
<td>$20,000</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Arts &amp; Culture</th>
<th>$125,825</th>
</tr>
</thead>
<tbody>
<tr>
<td>b.unity</td>
<td>$11,000</td>
</tr>
<tr>
<td>BrightSide Theatre</td>
<td>$10,000</td>
</tr>
<tr>
<td>Chicago Sinfonietta</td>
<td>$15,000</td>
</tr>
<tr>
<td>ClaySpace</td>
<td>$6,000</td>
</tr>
<tr>
<td>College of DuPage Foundation</td>
<td>$20,000</td>
</tr>
<tr>
<td>DuPage County Historical Museum Foundation</td>
<td>$2,500</td>
</tr>
<tr>
<td>Elmhurst Art Museum</td>
<td>$20,000</td>
</tr>
<tr>
<td>ESSE Adult Day Services</td>
<td>$3,825</td>
</tr>
<tr>
<td>Mandala South Asian Performing Arts</td>
<td>$2,500</td>
</tr>
<tr>
<td>Opera for the Young</td>
<td>$2,500</td>
</tr>
<tr>
<td>Spirito!</td>
<td>$5,000</td>
</tr>
<tr>
<td>Storycatchers Theatre</td>
<td>$2,500</td>
</tr>
<tr>
<td>Village of Glen Ellyn</td>
<td>$12,200</td>
</tr>
<tr>
<td>Wheaton Drama, Inc.</td>
<td>$10,300</td>
</tr>
<tr>
<td>Young Naperville Singers</td>
<td>$2,500</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Environment</th>
<th>$40,000</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Conservation Foundation</td>
<td>$20,000</td>
</tr>
<tr>
<td>The Morton Arboretum</td>
<td>$15,000</td>
</tr>
<tr>
<td>Three Fires Council, BSA</td>
<td>$5,000</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Animal Welfare</th>
<th>$16,967</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fetching Tails Foundation</td>
<td>$14,967</td>
</tr>
<tr>
<td>Greater Chicago Cage Bird Society</td>
<td>$2,000</td>
</tr>
</tbody>
</table>
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.

<table>
<thead>
<tr>
<th>Not-for-profit organizations receiving relief in FY21:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>63</strong> (as part of 97 since Fund began in FY20)</td>
</tr>
</tbody>
</table>

Grants in FY21

$755,000

(as part of $1.8 million since Fund began in FY20)

<table>
<thead>
<tr>
<th>Organization Name</th>
<th>Grant Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Addison Center for the Arts</td>
<td>$4,047</td>
</tr>
<tr>
<td>Alive Center</td>
<td>$5,000</td>
</tr>
<tr>
<td>Anima – Glen Ellyn Children’s Chorus</td>
<td>$15,000</td>
</tr>
<tr>
<td>Bensenville Wood Dale Food Pantry</td>
<td>$10,000</td>
</tr>
<tr>
<td>Bridge Communities, Inc.</td>
<td>$10,000</td>
</tr>
<tr>
<td>BrightSide Theatre</td>
<td>$15,000</td>
</tr>
<tr>
<td>Buffalo Theatre Ensemble</td>
<td>$15,000</td>
</tr>
<tr>
<td>Career &amp; Networking Center</td>
<td>$10,000</td>
</tr>
<tr>
<td>CASA of DuPage County, Inc.</td>
<td>$10,000</td>
</tr>
<tr>
<td>Chicago Sinfonietta</td>
<td>$15,000</td>
</tr>
<tr>
<td>ClaySpace</td>
<td>$15,000</td>
</tr>
<tr>
<td>College of DuPage Foundation</td>
<td>$20,000</td>
</tr>
<tr>
<td>D41Kids Foundation</td>
<td>$20,000</td>
</tr>
<tr>
<td>DayOne PACT</td>
<td>$12,000</td>
</tr>
<tr>
<td>Downers Grove Area FISH</td>
<td>$5,000</td>
</tr>
<tr>
<td>Downers Grove Choral Society</td>
<td>$10,178</td>
</tr>
<tr>
<td>DuPage County Historical Museum Foundation</td>
<td>$15,000</td>
</tr>
<tr>
<td>DuPage Federation on Human Services Reform</td>
<td>$4,940</td>
</tr>
<tr>
<td>DuPage Habitat for Humanity</td>
<td>$10,000</td>
</tr>
<tr>
<td>DuPage Health Coalition</td>
<td>$30,000</td>
</tr>
<tr>
<td>DuPage Senior Citizens Council</td>
<td>$10,000</td>
</tr>
<tr>
<td>DuPage Symphony Orchestra</td>
<td>$20,000</td>
</tr>
<tr>
<td>DuPagePads</td>
<td>$10,000</td>
</tr>
<tr>
<td>Educare West DuPage</td>
<td>$10,000</td>
</tr>
<tr>
<td>Elmhurst Art Museum</td>
<td>$15,000</td>
</tr>
<tr>
<td>ESSE Adult Day Services</td>
<td>$10,000</td>
</tr>
<tr>
<td>Evangelical Child &amp; Family Agency</td>
<td>$5,000</td>
</tr>
<tr>
<td>First Folio Theatre</td>
<td>$20,000</td>
</tr>
<tr>
<td>Glen Ellyn Children’s Resource Center</td>
<td>$5,000</td>
</tr>
<tr>
<td>Glen Ellyn Youth and Family Counseling Service</td>
<td>$8,000</td>
</tr>
<tr>
<td>Glen Ellyn-Wheaton Chorale</td>
<td>$8,842</td>
</tr>
<tr>
<td>H.O.M.E. DuPage, Inc.</td>
<td>$10,000</td>
</tr>
<tr>
<td>Healthcare Alternative Systems, Inc.</td>
<td>$10,000</td>
</tr>
<tr>
<td>Hinsdale Chorale</td>
<td>$3,050</td>
</tr>
<tr>
<td>Hope’s Front Door</td>
<td>$10,000</td>
</tr>
<tr>
<td>Immigrant Solidarity DuPage</td>
<td>$5,000</td>
</tr>
<tr>
<td>KidsMatter</td>
<td>$15,000</td>
</tr>
<tr>
<td>Little Friends, Inc.</td>
<td>$10,000</td>
</tr>
<tr>
<td>Lizzadro Museum of Lapidary Art</td>
<td>$15,000</td>
</tr>
<tr>
<td>Loaves &amp; Fishes Community Services</td>
<td>$10,000</td>
</tr>
<tr>
<td>Metropolitan Family Services DuPage</td>
<td>$10,000</td>
</tr>
<tr>
<td>NAMI DuPage</td>
<td>$45,000</td>
</tr>
</tbody>
</table>

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      |
Spirit!                                    | $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          |
“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

“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)

“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

“The DuPage Foundation’s philanthropic leadership makes DuPage County a more vibrant and healthy 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
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.

In 2003, DuPage Foundation was invited to participate in Grand Victoria Foundation’s (GVF) Communityworks initiative, a seven-year, $12 million initiative 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 high-quality 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 low-income 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 county-wide 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.”
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 operation as much as possible during the pandemic.

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.

Fundraiser
Arts DuPage participated in the second annual Giving DuPage Days campaign and raised $5,420.

Leader
Arts DuPage was selected by Arts Alliance Illinois to be among 24 arts leaders recruited for its statewide Arts and Vaccination Campaign, an effort to channel the creative talent of local artists to reach vaccine-hesitant residents.

“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
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 duly
Advancement Highlights

Fundraising 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 Iorgulescu, 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.
The DuPage Foundation Legacy Society honors our generous and forward-thinking 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 Mary 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 Mary 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. Schroech
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.* Szymanski
Charlie A. Thurston*
Mark M. and Barbara L. Turner
Theodore M. Utchen*
Mary 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 tax-free 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, receive support in the identification and vetting of charitable opportunities, and to provide the potential for more favorable tax-deductibility 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.
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.”

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.”

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.
### Statement of Financial Position

#### ASSETS

<table>
<thead>
<tr>
<th>Asset</th>
<th>June 30, 2021</th>
<th>June 30, 2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash and Equivalents</td>
<td>$1,924,849</td>
<td>$3,856,813</td>
</tr>
<tr>
<td>Investments</td>
<td>121,548,031</td>
<td>91,286,128</td>
</tr>
<tr>
<td>Pledges Receivable</td>
<td>287,000</td>
<td>188,211</td>
</tr>
<tr>
<td>Charitable Lead Trust Receivable</td>
<td>146,057</td>
<td>121,455</td>
</tr>
<tr>
<td>Fees Receivable</td>
<td>-</td>
<td>153,523</td>
</tr>
<tr>
<td>Prepaid Expenses</td>
<td>32,094</td>
<td>34,299</td>
</tr>
<tr>
<td>Cash Value of Life Insurance</td>
<td>473,136</td>
<td>505,942</td>
</tr>
<tr>
<td>Other Assets</td>
<td>73,200</td>
<td>-</td>
</tr>
<tr>
<td>Property and Equipment</td>
<td>1,218,884</td>
<td>1,256,145</td>
</tr>
</tbody>
</table>

**Total Assets** $125,703,251  $97,402,516

#### LIABILITIES AND NET ASSETS

**Liabilities**

<table>
<thead>
<tr>
<th>Liability</th>
<th>June 30, 2021</th>
<th>June 30, 2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agency Funds</td>
<td>$24,401,241</td>
<td>$18,071,527</td>
</tr>
<tr>
<td>Annuity Payable</td>
<td>70,586</td>
<td>90,451</td>
</tr>
<tr>
<td>Accrued Expenses</td>
<td>117,341</td>
<td>77,653</td>
</tr>
<tr>
<td>Other Liabilities</td>
<td>-</td>
<td>174,300</td>
</tr>
</tbody>
</table>

**Total Liabilities** $24,589,168  $18,413,931

**Net Assets**

<table>
<thead>
<tr>
<th>Net Assets</th>
<th>June 30, 2021</th>
<th>June 30, 2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Without Donor Restrictions</td>
<td>$16,098,587</td>
<td>$13,463,417</td>
</tr>
<tr>
<td>With Donor Restrictions</td>
<td>85,015,496</td>
<td>65,525,168</td>
</tr>
</tbody>
</table>

**Total Net Assets** $101,114,083  $78,988,585

**Total Liabilities and Net Assets** $125,703,251  $97,402,516

---

Donor-Advised 48%  
Field-of-Interest 19%  
Agency 14%  
Unrestricted 7%  
Designated 4%  
Operational 5%  
Scholarship 3%
# Statement of Activities

## Revenue

<table>
<thead>
<tr>
<th></th>
<th>Without Donor Restrictions</th>
<th>With Donor Restrictions</th>
<th>Total FY 2021</th>
<th>FY 2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gifts, Bequests, and Grants</td>
<td>$1,518,808</td>
<td>$8,703,824</td>
<td>$10,222,632</td>
<td>$7,769,826</td>
</tr>
<tr>
<td>Net Investment Gain</td>
<td>2,844,714</td>
<td>17,912,047</td>
<td>20,756,761</td>
<td>(496,889)</td>
</tr>
<tr>
<td>Investment Income</td>
<td>11,676</td>
<td>1,379,923</td>
<td>1,391,599</td>
<td>1,550,159</td>
</tr>
<tr>
<td>Fee Revenue</td>
<td>150,648</td>
<td></td>
<td>150,648</td>
<td>177,615</td>
</tr>
<tr>
<td>Net Assets Released from Restrictions</td>
<td>8,505,466</td>
<td>(8,505,466)</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total Support and Revenue</strong></td>
<td><strong>$13,031,312</strong></td>
<td><strong>$19,490,328</strong></td>
<td><strong>$32,521,640</strong></td>
<td><strong>$9,000,711</strong></td>
</tr>
</tbody>
</table>

## Expenses

<table>
<thead>
<tr>
<th></th>
<th>Without Donor Restrictions</th>
<th>With Donor Restrictions</th>
<th>Total FY 2021</th>
<th>FY 2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grants Awarded</td>
<td>$8,658,723</td>
<td></td>
<td>$8,658,723</td>
<td>$8,814,664</td>
</tr>
<tr>
<td>Grantmaking Activities</td>
<td>596,178</td>
<td></td>
<td>596,178</td>
<td>633,058</td>
</tr>
<tr>
<td>Management and General</td>
<td>603,719</td>
<td></td>
<td>603,719</td>
<td>569,319</td>
</tr>
<tr>
<td>Fundraising</td>
<td>537,522</td>
<td></td>
<td>537,522</td>
<td>588,222</td>
</tr>
<tr>
<td><strong>Total Expenses</strong></td>
<td>$10,396,142</td>
<td></td>
<td>$10,396,142</td>
<td>$10,605,263</td>
</tr>
</tbody>
</table>

## Increase (Decrease) in Net Assets

<table>
<thead>
<tr>
<th></th>
<th>FY 2021</th>
<th>FY 2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increase (Decrease) in Net Assets</td>
<td>$2,635,170</td>
<td>$19,490,328</td>
</tr>
<tr>
<td>Net Assets - Beginning of Year</td>
<td>$13,463,417</td>
<td>$65,525,168</td>
</tr>
<tr>
<td><strong>Net Assets - End of Year</strong></td>
<td><strong>$16,098,587</strong></td>
<td><strong>$85,015,496</strong></td>
</tr>
</tbody>
</table>

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.
First Grant Awarded From The Glen Ellyn Fund

In July, 2020, The Glen Ellyn 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 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.
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.

“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.
Electronic Service Requested
Please contact our office if you have corrections to your address information. THANK YOU!