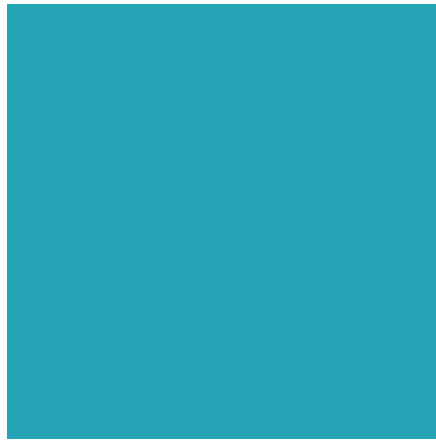


DuPage Foundation **DF** New Beginnings



ANNUAL REPORT
Fiscal Year 2015

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On The Cover ...

(Clockwise from top left): DuPage County has great places for families to connect, including bicycle paths; "Dare to Dream"; The Morton Arboretum and Foundation donors Jodi and Tom Ullrich.*

** Photo provided by The Morton Arboretum*

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 Our Chair and President

Dear Friends,

On behalf of the DuPage Foundation's Board of Trustees, committees and staff, we are pleased to present you with our Annual Report for the fiscal year ending June 30, 2015.

The theme of last year's Annual Report was "A Year of Growth and Promise." We think that it's safe to say that we fulfilled that promise. However, we're far from finished.

This past fiscal year marked one of significant change for the Foundation. We shortened our name and unveiled a new visual identity as part of a comprehensive rebranding initiative aimed at helping us increase our visibility, refresh our image and better resonate with our friends and partners. We also made a significant investment in our capacity with a move to a beautiful new office condo located at 3000 Woodcreek Dr., Ste. 310, in Downers Grove. This space, which we are pleased to share has been fully paid for thanks to the generosity of a committed group of Foundation friends, puts us near the intersection of two of DuPage's main arteries, I-355 and I-88, allowing easier access to our constituents and vice versa, while providing us with the facilities and resources we need to maximize our effectiveness and accommodate future growth.

Despite these events, we have remained locked in to our development and program activities. During fiscal year 2015, we added 15 funds, saw our assets increase to nearly \$63 million and welcomed six additional individuals and couples to our Legacy Society. In addition, our Community Needs Grant Program awarded more than \$470,000 to area not-for-profits delivering vital programs and services working to raise the quality of life for DuPage County residents. On top of this support, several of our donor-advisors recommended approximately \$158,000 in additional funding from their donor-advised funds to supplement our discretionary grant budget and maximize the number of requests funded. These awards, combined with grants from our special initiatives and other restricted funds totaled more than \$3.5 million during the fiscal year and bring the total amount of grants we have awarded since our inception to more than \$23 million!

Speaking of our special initiatives, we are delighted to share that our Bright & Early DuPage initiative continues to gain momentum and is making a significant impact in our effort to provide DuPage area children ages birth to five with the necessary tools and resources they need to be ready for kindergarten and lead successful lives. In addition to serving as one of the catalysts for DuPage's receipt of significant federal funding to expand four-year-old preschool slots for low income children, the initiative added its third collaborative in Bensenville and has engaged the DuPage Federation on Human Services Reform to serve as a regional hub to coordinate professional development, provide data collection and analysis, and deliver technical assistance to support local collaboration efforts.

Looking ahead, we are extremely excited about the creation and launch of our new initiative, Arts DuPage. This initiative will oversee the creation and incubation of a county-wide arts council to support and advance DuPage's vibrant arts community. The initiative has been extremely well-received by local arts agencies, prospective funders and the community at large. We look forward to seeing the impact that it will make as it develops.

Despite all of these activities and changes, one thing remains constant—our commitment to delivering our donors, not-for-profits and other partners exceptional personalized service and support in accomplishing their goals.

Thank you for your continued support, your confidence and trust in our stewardship, and all you do to help foster philanthropy and raise the quality of life throughout DuPage County and beyond.



Stephen M. Burt
Board Chair



David M. McGowan, CFRE
President



Stephen M. Burt



David M. McGowan

Fast Facts

Founded
1986

Our Core Competencies

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

6,258

The approximate number of volunteer hours donated to the Foundation in FY15.

By the Numbers:

1,159

The number of donors to the Foundation in Fiscal Year 2015.

\$5,040

Average gift amount to the Foundation in Fiscal Year 2015.

9.21%

Five-year average annual Main Investment Pool return net of fees as of June 30, 2015) vs. benchmark of 8.51%

\$62.8 million

Total amount of assets under Foundation management as of June 30, 2015.

15

The number of new funds established in FY15.

Serving You is Our Pleasure

Donors

Our donors trust in us. The professional staff of the DuPage Foundation seeks to provide each donor we serve with the highest level of efficiency, flexibility, expertise, and personal care. We also provide anonymity, if desired, accountability, perpetuity and maximum tax benefits for all gifts contributed.

To establish a named endowment fund, the minimum amount necessary is \$25,000. However, we welcome and encourage gifts of all sizes to existing funds.

Not-For-Profits

Our not-for-profit partners are important to us and so are the relationships we have established with them. The Foundation makes grants annually to not-for-profits serving DuPage County. We also provide them with scores of referrals to alternative funding sources, individual consultations and training opportunities in the form of seminars and workshops.

Additionally, a number of not-for-organizations choose to enlist the Foundation's support in building their endowments and developing their planned giving programs. The Foundation staff shares its expertise with our partners to help strengthen their organizations in the areas of development, marketing, and the cultivation of area professionals and philanthropic leaders.



Professional Advisors

The Foundation also maintains close relationships with our professional advisors. Whether you are an accountant, attorney, financial planner, life underwriter or trust officer, our skilled staff is here to assist you in accomplishing the charitable goals of your clients.

From offering organizational assistance and personal contacts, to providing individual site visits to local charities and timely continuing education seminars and programs on topics relevant to your practice, it is our pleasure to assist you in any way that we can to facilitate the giving process for you and your clients.



Above: James J. Grogan, deputy administrator & chief counsel for the Illinois Attorney Registration & Disciplinary Commission, presented a continuing education seminar for professional advisors titled "Ethical and Regulatory Issues in Charitable Planning" at The Morton Arboretum.

Top left: Ed and Shirley Crawford recently became members of the Foundation's Legacy Society. They wish to stay connected to the community and turned to the Foundation for assistance.



Below: Lisa Drake (center) and Ron Austin of CASA of DuPage County, Inc., are joined by Ruth Carlson, a member of the Foundation's Grant Committee, after receiving a grant at the Foundation's Spring Community Needs Grant Breakfast.

Giving Opportunities

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

Cash

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

Marketable or Closely-Held Securities

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

Real Estate

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

Life Insurance

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

Retirement Plans

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

Transfer from an Existing Private Foundation

Administering a private foundation under IRS rules can be burdensome and expensive. Transferring the assets into a donor-advised fund at the DuPage Foundation provides a cost-effective alternative for administering these funds well into the future.

Charitable Lead Trusts

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

Charitable Remainder Trusts

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

Please Remember Us In Your Estate Plan

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

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

OR

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

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

Fund Options

General Endowment

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



A smiling face backstage at the Salt Creek Ballet's *The Nutcracker*. Salt Creek Ballet has an agency endowment fund with the Foundation.

Field-of-Interest Funds

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

Donor-Advised Funds

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



Members of the Morrissey family volunteered at a mobile food pantry in July 2014 in conjunction with the Northern Illinois Food Bank. The mobile food pantry was funded by the Morrissey Family Fund.

Scholarship Funds

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

Agency Endowment & Designated Funds

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



Teen dads at the annual summer picnic of Teen Parent Connection. The dads are members of the Strong Dads - Strong Families support program.

Operating Funds

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

In Memory ...

During the past fiscal year, the Foundation said goodbye to many dear friends. We thank them for their contributions to our community and remember them here.

- Bob Harris
- Joseph Hynes
- Dinny Knuepfer
- Eileen Webb
- Dorothy B. White

New Fund Partners

The DuPage Foundation was pleased to welcome 15 new fund partners in Fiscal Year 2015.

We are grateful to our donors and agency partners for their passion and commitment to helping advance our mission and vision throughout DuPage County and beyond.

Agency Endowment & Designated Funds

- Elmhurst Choral Union Agency Fund
- Karen Kuchar Endowment Fund
- National Alliance on Mental Illness - DuPage Designated Fund
- Naperville CARES Endowment Fund
- Karen J. Stewart Memorial Fund

Donor-Advised Funds

- Steve and Maryann Baker Fund
- Goldstein - McGrath Fund
- Liesel E. Kossmann Fund
- Paul and Dottie Foundation
- Paul and Dottie Real Estate Holding Fund
- Daniel R. Ruscitti Charitable Foundation
- Frank G. and Mary Kay Slocumb Fund
- Leslie A. and Mary E. Wiberg Charitable Gift Annuity Fund

Field-of-Interest & Unrestricted Funds

- Bright & Early DuPage Endowment Fund
- Bright & Early DuPage Pass-Thru Fund



A happy face is behind the key to her new car. Clients in need of transportation may apply to receive a refurbished car that has been donated through the Naperville CARES Car Donation Program.



Naperville CARES began its agency endowment fund at the DuPage Foundation in October 2014 and encouraged all of its Board members to contribute toward the fund.

Naperville CARES helps local families in financial crisis meet their essential needs by providing emergency financial support and resources.

www.napervillecares.org



An Initiative of the DuPage Foundation

Smart Ideas for Year-End Benefits

With the end of the year fast approaching, now is an excellent time for you to review your plans. You might want to make a list to ensure that you have taken full advantage of all of the tax-saving deductions available to you. Here are some ideas for year-end planning that can support us and benefit you.

CHARITABLE CONTRIBUTIONS

A simple gift of cash or an unneeded appreciated asset can assist our work and provide you with valuable tax savings. You can use the gift to create or add to a fund to accomplish your personal charitable goals.

CHARITABLE GIFT ANNUITY

Double your benefits while making a gift and receiving cash back. A gift annuity gives you income tax advantages this year while providing you with dependable payments for life at attractive fixed rates.

IRA CHARITABLE ROLLOVER

If Congress again renews the IRA charitable rollover, you can transfer up to \$100,000 directly from your IRA to a qualified not-for-profit such as the DuPage Foundation without recognizing the income. Certain restrictions apply. Check with us to see if this option is available this year.

ADDITIONAL TAX SAVINGS

Be sure to review your mortgage, medical, education, business and other miscellaneous expenses to determine if there are additional ways you can save on taxes this year. Check your list against your advisor's recommendations to avoid missing any significant deductions. Congress has changed the rules in recent years. If you haven't visited your attorney to review your estate plan, you should make an appointment before the end of the year or early in the new year. Your plans may need to be updated, particularly if you have experienced life changes. Please contact us for help.

We can refer you to qualified advisors who can help make your planning easier.

Please contact Mike Sitrick, Foundation director of development, at 630.598.5285 or mike@dupagefoundation.org with questions or for more information.

PROFESSIONAL ADVISORS CAN HELP

The DuPage Foundation has been fortunate to work with an outstanding group of professional advisors throughout our history. They include attorneys, especially those who focus on estate planning; financial planners and investment managers; trust officers, accountants and life underwriters. These advisors refer their clients to the Foundation to assist them with their charitable planning. The professional advisors who have made referrals to the Foundation are listed on the Foundation's website at: www.dupagefoundation.org/ForAdvisors/ProfessionalAdvisorReferrals.aspx.

One firm that exemplifies the great professional advisors on that list is Bellock & Coogan, Ltd. (www.oak-brookestateplanning.com). The attorneys there are active philanthropists themselves at the DuPage Foundation and with many other organizations in the community. They have no problem talking to their clients about giving and volunteering because it is part of their individual DNA and has become part of the firm's culture.

Feel free to contact them or any of the fine firms listed on our site.



The law firm of Bellock & Coogan, Ltd. creates lasting client relationships through trust, integrity, superior service and clear communication.

Fiscal Year 2015 Highlights

JULY

The first year of the Bright & Early DuPage initiative showed progress in Wheaton/Warrenville. A grant was awarded to fund year two of the Wheaton/Warrenville Early Childhood Collaborative. A second collaborative was also funded in Addison, helping realize the Foundation's commitment to providing impactful support to local early childhood collaborations to help them develop local systems geared toward improving kindergarten-readiness in DuPage communities.



AUGUST

The "DuPage All for Arts Study" was launched and an advisory committee created to explore the feasibility of establishing a local arts council in DuPage County. The study was underwritten by a grant from the JCS Fund of the DuPage Foundation.

A cocktail reception, hosted by Foundation Trustee Nathaniel Wasson and his wife Sandra, was held at Barbakoa in Downers Grove. Approximately 30 people were treated to Latin cooking and camaraderie while discovering all the Foundation can offer in the area of philanthropy.

SEPTEMBER

The Inaugural Chair's Dinner was held at Glen Oak Country Club, hosted by Board Chair Steve Burt and his wife Emily.

The Foundation was featured as part of BMO Harris Private Bank's Economic Outlook & Market Update which concluded with a roundtable discussion on community foundations.

OCTOBER

Trustee Denice Gierach hosted a reception for Trustees and Trustees Emeriti at Stonebridge Country Club.

The Foundation hosted a seminar for professional advisors titled "Ethical and Regulatory Issues in Charitable Planning." The seminar was presented by James J. Grogan, deputy administrator & chief counsel for the Illinois Attorney registration & Disciplinary Commission (IDRC).

NOVEMBER

The Foundation joined more than 750 community foundations across America for the 25th Annual Community Foundation Week, celebrating how the work we have done locally has impacted the lives of those in our communities and beyond.

The Foundation's 22nd Annual Benefit "A Hard Day's Night" was our most successful in Foundation history! We hosted a record-breaking number of attendees and netted more than \$275,000 in support of our Operating and Emergency funds.



"A Hard Day's Night" was the theme of the Foundation's 22nd Annual Benefit and featured entertainment by "American English" The Complete Beatles Tribute Band.

The Foundation's Board of Trustees voted to bestow Trustee Emeritus status to three former Board members: Janet Hodge, Laurie McMahon and Carson Yeager.

DECEMBER

The Foundation hosted approximately 40 guests for "Investment, Tax, Estate and Charitable Gift Planning Strategies for Year End and Beyond" at Glen Oak Country Club.

More than 75 people mingled and jingled with us at our annual Holiday Open House and Fall Community Needs



Grant Distribution Event. 29 grants were awarded during this grant cycle for a total of \$207,535.

The Governor's Office announced that Illinois would receive \$20 million per year of competitive grant money to expand full-day preschool services for four-year-olds in 18 communities in the state. Two of the Foundation's Bright & Early DuPage collaborative communities—Addison and Wheaton/Warrenville—were among the recipients selected.

FEBRUARY

Sabrina Lear joined the Foundation staff as its administrative assistant.

The Foundation hosted its inaugural "I Love Taxes" Advisor Roundtable at SEASPAR in Downers Grove. Approximately 25 attendees enjoyed the discussion led by an esteemed panel of area professionals.

The Foundation hosted Chuck Loring, a renowned board leadership and fundraising expert, for its annual board and staff retreat, followed by a workshop for agency partners. Approximately 80 attendees were treated to "Building Endowments Through Effective Annual Fundraising and/or Campaigns" at the Medinah Shriners Banquets in Addison.

MARCH

The Foundation introduced its new name, "the DuPage Foundation," and new visual identity.



A study about hunger in DuPage was released by The Northern Illinois Food Bank. The Foundation funded the study with a grant it made in 2012.

APRIL

The Foundation celebrated its volunteers during National Volunteer Week.

The Foundation hosted a continuing education program for professional advisors titled "Navigating the 3.8% Net Investment Income Tax: What Fiduciaries and Their Advisors Need to Know." The seminar was held at Maggiano's Little Italy in Oak Brook and featured Richard Dees, a partner with McDermott Will & Emery LLP.

MAY

The Foundation hosted a seminar for our constituents titled "Protecting Your Future: Tax Savvy Strategies for Retirement, Long-Term Care and Charitable Planning" at the Naperville Country Club. Approximately 40 guests attended.

JUNE

The Foundation hosted nearly 90 guests for its annual Grant Breakfast at Glen Oak Country Club. The Foundation distributed 28 grants totaling \$400,001 to local not-for-profits in support of health and human service programs.



Foundation Trustee and Grant Committee Member Betsy Brosnan (center) takes a moment to pose

with Lanie Munzing (left) and Sandy Gbur from the Western DuPage Special Recreation Association. The organization received a grant at the Spring Community Needs Grants Breakfast.

The Foundation prepared for the move to its new office location in Downers Grove. The move subsequently took place on July 7, 2015.



The Foundation diligently searched for its new home in Downers Grove, a convenient location for donors with adequate space for staff and room to grow.

The Grantmaking Process

The DuPage Foundation's Community Needs Grant Program is a competitive process in which local not-for-profit organizations annually apply for grants in one of four categories: Arts and Culture, Education, Environment, and Health and Human Services. Earnings from the Foundation's Unrestricted and Field-of-Interest Funds are used to fund the grants which are awarded. "Since the Foundation's inception, the Community Needs Grant Program has served as the backbone of our grantmaking and it is one of the most effective ways we learn about the critical needs and gaps that exist in our community," said Barb Szczepaniak, director of programs for the Foundation. "Many of the requests we receive are worthy of funding but, unfortunately, we can't support them all so we must rely on our stellar Grant Committee to select the programs and projects that will have the greatest impact or help leverage additional resources."

The following is the path from application submission to the awarding of a grant.

1. Grant applications are submitted from DuPage not-for-profits to the Foundation through our online portal (www.dupagefoundation.org) under "Apply." Arts & Culture, Education and Environment applications are considered in the fall and Health & Human Services requests are considered in the spring.



2. Program staff review applications for completeness.



3. 15 Grant Committee members individually analyze and review applications using a set of evaluation criteria.



4. Grant Committee meets multiple times to discuss the merits of each application and to select the programs for funding that best address needs in the community, improve the quality of life for those who live and work in DuPage, and have the greatest impact.

5. A list of vetted applications is shared with Foundation donor-advised fund representatives who have funds with the Foundation in an effort to educate them about the needs in the community, engage them in the grant process and increase the dollar amount and number of grants we can award in response to the requests we have received.

6. Foundation Board of Trustees approves grants to be awarded.



7. Grant applicants are notified about the disposition of their request.



8. Grants are distributed at a fun event!

Types of Grants

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

Unrestricted Funds

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

Field-of-Interest Funds

- Access to Recreation Fund
- Arts Fund
- Basic Human Needs Fund
- The Alben F. Bates and Clara G. Bates Foundation Fund
- Shirley and Howard Benson Fund
- Children and Youth Fund
- Ruth and Hugh Christ Fund
- Environmental Fund
- Health Fund
- The John and Elsie, Mary and Arthur Kolar Fund
- Wesley E. Luehring Foundation Fund
- Martha McCormick Hunt Fund
- Sindelar Family Fund
- Donald and Dianne Skeet Fund

Community Needs Grant Recipients

Arts & Culture

**Denotes mini-grant*

Anima-Glen Elynn Children's Chorus	\$7,500
To support high-quality music education for youth and engage the larger community in the arts through affordable, accessible programming and community concerts.	
ArranmoreArts*	\$2,500
To offer "StoryJam," a public, historical theatre production and "SongJam," a song-writing workshop to families.	
DuPage Symphony Orchestra*	\$2,500
To make symphony orchestra concerts and music education outreach programs accessible to young people, regardless of socioeconomic background, age or race.	
Elmhurst Choral Union*	\$2,500
To start a small group vocal ensemble which would perform a different repertoire than the regular community choir.	
First Folio Theatre*	\$2,500
To purchase assisted listening devices to accommodate audience members' hearing deficiencies.	
Lizzadro Museum of Lapidary Art	\$10,000
To support educational programs in earth science and promote cultural awareness of lapidary art.	
The Naperville Men's Glee Club*	\$2,200
To provide cancer survivors with complimentary tickets for "Voices of Hope," a concert featuring local singers who share the cancer experience and a passion for vocal music.	
One Voice Outreach Choir*	\$2,000
To purchase recording equipment and a sound system to enable the choir to be recorded.	
Salt Creek Ballet	\$9,000
To support a live, professional orchestra to accompany performances of "The Nutcracker" in 2015 and to pilot a live musical component to outreach programs.	
Spirito!*	\$2,500
To support music theory teacher salaries for the Ragazze theory training classes.	
Wheaton Band Festival*	\$2,000
To support the 2015 Wheaton Band Festival, an annual summer event providing free band concerts for the education, enrichment, and enjoyment of the community.	
Young Naperville Singers*	\$2,000
To purchase drums for a program that motivates young male singers and increases their exposure to choral music and rhythmic drumming.	

Total Arts & Culture Grants - 12 **\$47,200**

Education

CareNet Pregnancy Services of DuPage* \$2,000

To purchase equipment that will support Amplify Youth Development in providing pregnancy prevention and healthy relationship education to 10,000 teens in DuPage County.

DuPage Children's Museum \$10,000

To support price-reduced family memberships (\$10) for low-income families and professional development for their case workers.

Junior Achievement of Chicago *(Partially funded by the Sue Wallace Fund)* \$15,000

To sponsor volunteer-led programs to teach financial literacy, work readiness, and entrepreneurship for low-income children in 30 classrooms in Addison and Hanover Park.

KidsMatter *(Partially funded by Communityworks and Perma-Seal funds)* \$8,000

To support the KidsMatter Job Fair, which provides employment opportunities and workforce preparation via mock interviews, resume building, social media, and internship opportunities.

Literacy DuPage \$10,000

To support the free, accessible and customized tutoring program to help adult learners, who are unable to access other educational instruction, increase their English language and literacy skills.

School and Tutors on Wheels* \$2,500

To support a free adult English language literacy program for low-income adults whose needs are not well-suited to educational instruction at community colleges.

The Community House \$20,000

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

Tri-Town YMCA \$6,835

To support an after-school program to help students find math in everyday experiences and create awareness about the importance of these skills in future career options.

Total Education Grants - 8 \$74,335

Foundation director of programs Barb Szczepaniak participates in the KidsMatter Job Fair as a mock interviewer. Students attending the Fair are encouraged to interview as a method to overcome their fears when in an actual job interview.



Environment

The Conservation Foundation <i>(partially funded by the Conrad and Doris Brassine Fund)</i>	\$12,000
To support a pilot program to increase local, community-based conservation initiatives in local municipalities.	
SCARCE	\$20,000
To support recycling, composting, and collection programs to assist DuPage County residents, businesses, and organizations in diverting resources from landfills and protecting land, water, and air.	
The Wetlands Initiative	\$20,000
To advance the Spring Brook project which will restore a healthy stream corridor within the Blackwell and St. James Farm forest preserves.	
Total Environment Grants - 3	\$52,000

Special Initiative

Giving DuPage	\$5,000
To sponsor the “Purposeful Boards, Powerful Fundraising” workshop, featuring Chuck Loring.	
Catholic Charities <i>(Recommended by Michael L. Nysten of MB Financial Bank at the DuPage County Estate Planning Council's September meeting)</i>	\$1,000
To support general operations.	
The Conservation Foundation	\$2,000
To sponsor the 2015 DuPage Environmental Summit.	
Council on Foundations	\$3,340
Dues to support general operations.	
Loaves & Fishes Community Services	\$5,000
To sponsor a symposium on food insecurity and its effect on children.	
Positive Parenting DuPage	\$500
To sponsor its “Who’s Who” event for local not-for-profits.	
President’s Special Initiative Grants	\$5,327
Grants directed to local not-for-profits by the Foundation’s staff.	
Total Special Initiative Grants - 7	\$22,167

Health & Human Services

Bridge Communities, Inc.	\$20,000
To provide children in the Bridge program the opportunity to participate in programming in the areas of science, literacy, fine arts, money management, nutrition and wellness.	
CASA of DuPage County, Inc. <i>(Partially funded by the Sullivan-Taylor Family Fund and a pass-through gift from the McWethy Foundation)</i>	\$20,000
To provide court-ordered child advocacy to 350+ children who, through no fault of their own, find themselves in the DuPage County juvenile court system due to abuse, neglect and/or dependency.	
Catholic Charities Diocese of Joliet	\$20,000
To provide emergency assistance to and case management services for low-income individuals and families in DuPage County who are homeless or at risk of homelessness.	
DuPage Homeownership Center, Inc. <i>(Partially funded by the Sue Wallace Fund)</i>	\$15,000
To provide year-round financial literacy workshops and one-on-one counseling to empower individuals and families to achieve self-sufficiency and financial stability.	
DuPage Senior Citizens Council	\$15,000
To support the creation of a new Friendly Visit program that will assist older persons with basic home tasks associated with daily living, and ensure the safety and health of vulnerable seniors.	
ESSE Adult Day Services*	\$2,000
To purchase program materials and locked cabinets to store client records and medications.	
Giant Steps	\$20,000
To support the Day School at Giant Steps, which will provide area youth and young adults ages 5-22 with Autism Spectrum Disorder the academic and social-emotional tools to live independently.	
Glen Ellyn Food Pantry	\$15,700
To support food pantry renovations to expand volunteer work space, increase inventory capacity and create a "food safe" area to sort recovered food.	
LOVE Christian Clearinghouse	\$10,000
To provide rent, utility and car repair assistance to individuals experiencing an unexpected, temporary, financial set-back.	
Metropolitan Family Services DuPage	\$11,694
To support the Grandparents Raising Grandchildren program, which provides specialized evidence-based training to relative caregivers and to develop support groups for the children in their care.	
Naperville CARES	\$8,000
To support the Emergency Assistance program, which provides rent, utility, car payment and child care assistance to low-income families.	
Neighborhood Food Pantries	\$20,000
To purchase refrigeration units and to support the site work needed to install them at three food pantries.	

Northern Illinois Food Bank	\$20,000
To support the Take 50 to Encourage program, which provides DuPage food pantries with a 50% credit toward the purchase of healthy food items.	
Outreach Community Ministries (Funded by Communityworks funds)	\$20,000
To support the Employment Opportunity Center which helps young adults with skill development, academic and career assessment, increased math and reading proficiency and direct job experience.	
Parents Alliance Employment Project	\$9,000
To support a part-time job coach position for Project SEARCH, a high school transition program, which provides classroom instruction and job-skills training for disadvantaged youth with disabilities.	
People's Resource Center (Partially funded by the Betty M. Bock Donor-Advised Fund)	\$10,000
To support the purchase of a new van that will increase PRC's capacity to safely transport donated food from donor sites to their food pantries.	
Prairie State Legal Services	\$20,000
To provide legal services for homeless persons to help them overcome barriers to housing and promote self-sufficiency.	
Samaritan Interfaith Counseling Center (Partially funded by the Sullivan-Taylor Family Fund)	\$15,000
To support salaries to provide fee-subsidized counseling to 104 clients with incomes 0-30% of the median family income in DuPage County and free counseling to 22 clients onsite at Loaves and Fishes.	
Serenity House Counseling Services, Inc.	\$7,500
To purchase bicycles and install a permanent bike shelter to provide residential clients, who are recovering from a substance abuse disorder, transportation that is flexible and cost effective.	
Wayne/Winfield Area Youth/Family Services (WAYS)*	\$2,500
To provide a nutrition component, focused on healthy eating to prevent obesity into the WAYS' Summer Day Camp for at-risk youth.	
Western DuPage Special Recreation Association Foundation	\$15,000
To support the Synergy Adaptive Sports program, a joint cooperative effort between WDSRA and NEDSRA, which provides a variety of athletic opportunities for residents with physical disabilities.	
Youth Outlook	\$10,000
To support direct service programs for LBGTQ youth so that they avoid high-risk behaviors, and for education programs with youth-serving institutions to create a more welcoming and tolerant atmosphere.	
Total Health and Human Services Grants - 22	\$306,394

Donor-Advised

In response to Community Needs grant applications received during fiscal year 2015, Foundation donor-advised fund representatives recommended grants to fully fund 12 grants totaling \$127,607.

Addison Center for the Arts (Funded by the JCS Fund)	\$3,500
To support “Arts Alive: An After School Program” which is a free after-school program for junior high students covering the disciplines of music, theater and visual arts.	
Chicago Sinfonietta (Funded by the JCS Fund)	\$10,000
To support a five-concert subscription season at North Central College’s Wentz Concert Hall.	
Community School of the Arts, Wheaton College (Funded by the JCS Fund)	\$7,500
To support the Community Outreach for Developing Artists (CODA) program to provide weekly music classes and semi-private violin lessons at District 33, World Relief DuPage, and Educare of West DuPage.	
Educare of West DuPage (Funded by the Perma-Seal Fund)	\$500
To support coaching on the dual language model for teachers of preschoolers and develop this model for teachers of children birth to age three.	
Elmhurst Art Museum (Funded by the JCS Fund)	\$10,000
To support current programs and develop new initiatives in the Education Center and throughout the museum that will engage and teach children, adults and families about art, design and architecture.	
Family Shelter Service (Funded by the Betty M. Bock Donor-Advised Fund)	\$20,000
To support the Combined Emergency Shelter and Community Counseling facility which provides safe refuge and supportive counseling services for victims of domestic violence.	
Friends for Therapeutic Equine Activities (Funded by the the Edward and Minnie Ceragioli Fund)	\$4,000
To support the therapeutic horseback riding program for children and adults with disabilities.	
Loaves & Fishes Community Services (Funded by the Betty M. Bock Donor-Advised Fund)	\$15,000
To support the purchase of a refrigeration unit which will enable them to distribute 12,000-15,000 additional pounds of produce, meat and dairy items each week.	
NAMI DuPage (Funded by the DuPage Medical Group Charitable Fund)	\$20,000
To support a new program which provides peer support and individualized recovery support to individuals with a mental illness.	
Naperville Area Humane Society (Funded by the Conrad and Doris Brassine Fund)	\$2,500
To support humane education which promotes humane treatment of animals and creates lasting human-animal bonds.	
SEASPAR (Funded by the DuPage Medical Group Charitable Fund)	\$14,607
To support “Commit to be Fit,” a program focused on healthy eating, weight loss, nutrition and exercise for adults with disabilities.	
Teen Parent Connection (Funded by the Betty M. Bock Donor-Advised Fund)	\$20,000
To support adolescent family strengthening programs that provide a continuum of parenting support, education, and resources to adolescent parents in DuPage County.	

Financial Highlights

Growth

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

ASSETS

FY 2011	\$37,231,568
FY 2012	\$40,145,804
FY 2013	\$47,016,028
FY 2014	\$59,537,304
FY 2015	\$62,815,765

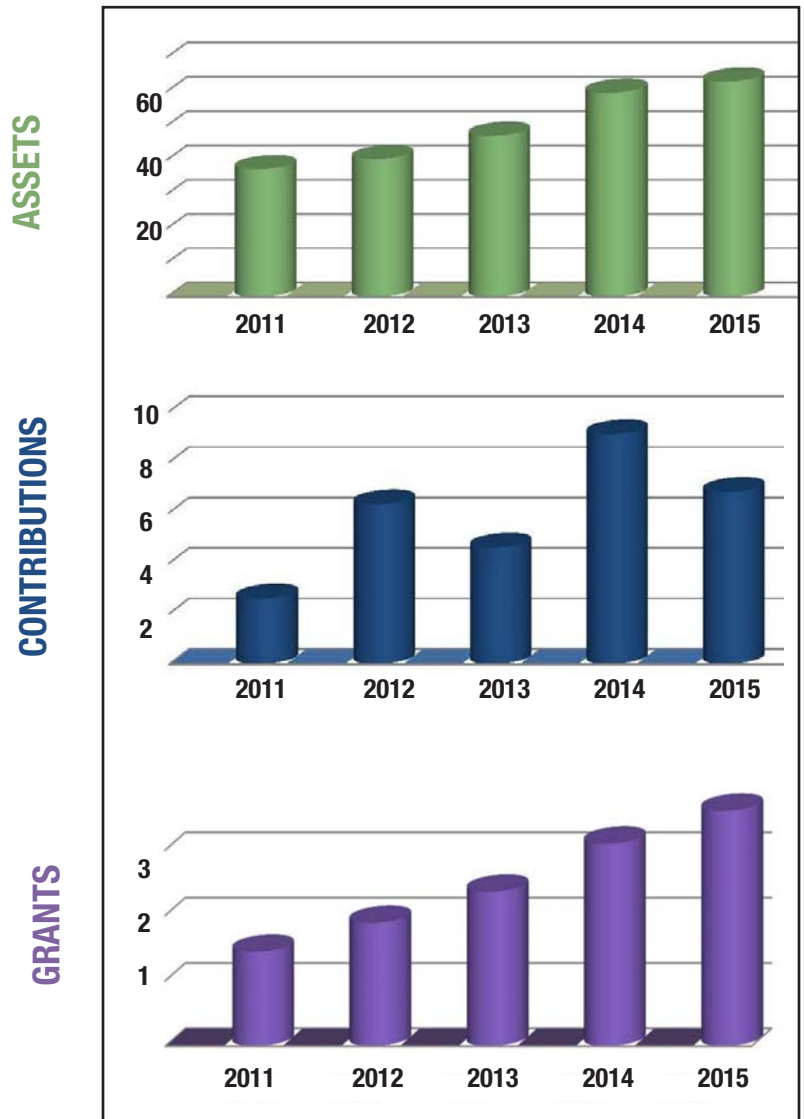
CONTRIBUTIONS

FY 2011	\$2,583,720
FY 2012	\$6,321,390
FY 2013	\$4,603,110
FY 2014	\$9,090,740
FY 2015	\$6,810,927

GRANTS

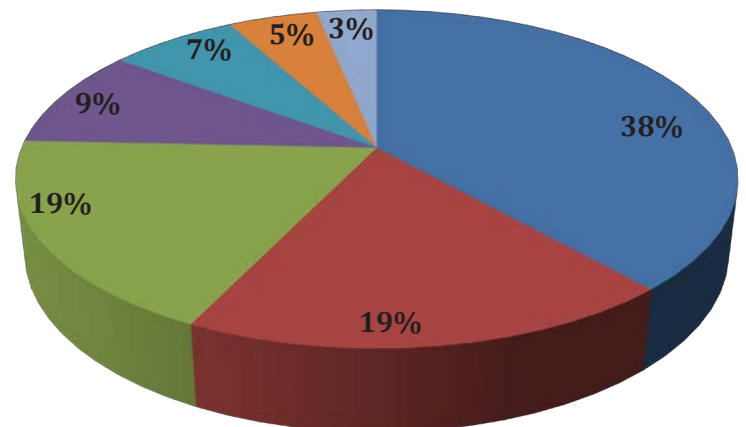
FY 2011	\$1,441,019
FY 2012	\$1,883,775
FY 2013	\$2,360,061
FY 2014	\$3,095,458
FY 2015	\$3,598,673

in millions of dollars



Fiscal Year 2015 Assets By Fund Type

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



Statement of Financial Position

Assets (as of June 30)

	2015	2014
Cash	\$1,691,233	\$2,833,124
Administrative Fees Receivable	122,458	114,109
Prepaid Expenses and Other	23,866	26,097
Charitable Lead Trust Receivable	211,239	229,368
Investments	58,198,752	55,221,367
Reinsurance Contract	125,322	154,374
Cash Value of Life Insurance	539,509	532,034
Other Assets	28,000	0
Property and Equipment, Net	1,875,386	426,841
Total Assets	\$62,815,765	\$59,537,304

Liabilities and Net Assets (as of June 30)

	2015	2014
Liabilities:		
Accounts Payable and Accrued Expenses	\$247,834	0
Agency Funds	11,626,672	11,929,528
Annuities Payable	262,714	195,637
Line of Credit	267,413	0
Accrued Liabilities	16,870	11,531
Total Liabilities	\$12,421,503	\$12,136,696
Net Assets:		
Unrestricted	\$8,169,503	\$8,190,490
Temporarily Restricted	7,609,264	7,628,500
Permanently Restricted	34,615,495	31,581,618
Total Net Assets	\$50,394,262	\$47,400,608
Total Liabilities and Net Assets	\$62,815,765	\$59,537,304

Statement of Activities

	Unrestricted	Temporarily Restricted	Permanently Restricted	2015	2014
Support and Revenue:					
Gifts, Bequests, and Grants	\$1,382,108	\$2,394,942	\$3,033,877	\$6,810,927	\$9,090,740
Interest and Dividend Income	181,252	749,593	—	930,845	722,977
Net Investment Gains/Losses	(67,455)	208,420	—	140,965	4,874,001
Administrative Fees	112,920	—	—	112,920	108,234
Net Assets Released From Restrictions	<u>3,372,191</u>	<u>(3,372,191)</u>	<u>—</u>	<u>—</u>	<u>—</u>
Total Support and Revenue	<u>\$4,981,016</u>	<u>(\$19,236)</u>	<u>\$3,033,877</u>	<u>\$7,995,657</u>	<u>\$14,795,952</u>
Expenses:					
Grants Awarded	\$3,598,673	—	—	\$3,598,673	\$3,095,458
Grantmaking Activities	796,176	—	—	796,176	712,464
Management and General	309,477	—	—	309,477	261,111
Fundraising	<u>297,677</u>	<u>—</u>	<u>—</u>	<u>297,677</u>	<u>234,731</u>
Total Expenses	<u>\$5,002,003</u>	<u>—</u>	<u>—</u>	<u>\$5,002,003</u>	<u>\$4,303,764</u>
Increase (Decrease) in Net Assets	(\$20,987)	(\$19,236)	\$3,033,877	\$2,993,654	\$10,492,188
Net Assets, Beginning of Year	<u>\$8,190,490</u>	<u>\$7,628,500</u>	<u>\$31,581,618</u>	<u>\$47,400,608</u>	<u>\$36,908,420</u>
Net Assets, End of Year	<u>\$8,169,503</u>	<u>\$7,609,264</u>	<u>\$34,615,495</u>	<u>\$50,394,262</u>	<u>\$47,400,608</u>

The fiscal year 2015 audit for the DuPage Foundation was performed by Plante Moran PLLC. These summarized financial statements are condensed from the audited statements which are available on the Foundation's website.

** Certain 2014 amounts have been reclassified to conform with the 2015 financial statement presentation. 2014 net assets and changes in net assets are unchanged due to these reclassifications.*

Legacy Society

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

*remembered

Anonymous (70)

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Ramon A. Mulholland*
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[Gwen Mundell Memorial Scholarship Fund for graduates of York High School in Elmhurst](#)

Charlotte Mushow
[Mushow Fund for Human Services](#)

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[Lewis E. and Jean C. Neill Fund](#)

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[Shebik Family Fund for Basic Human Needs and History DuPage Fund](#)

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Leslie A. and Mary E. Wiberg
[Leslie A. and Mary E. Wiberg Fund](#)

Carson and Dawn Yeager

Wibergs' Travels Always Lead Back to DuPage

Les and Mary Wiberg have traveled the world. They have been to six continents and countless countries and are extremely proud of their journeys.

"We've enjoyed every place we've visited and look forward to continuing our travels," said Mary. The Wibergs recently returned from a two-week vacation to Norway as part of a joint birthday trip. It was their third time visiting the country but first time making it all the way to its northern border.

Although the Wibergs have traveled far and wide, they have chosen to keep DuPage County their home. Upon making the decision to downsize from their long-time home in Wheaton, the couple resisted the temptation to migrate south and instead chose to purchase an apartment at Wyndemere. As they approach the two-year anniversary of their move, the couple finds they have just about everything they need: wonderful friends, a host of activities at their disposal, and a beautiful home adorned with objects from their many travels. Ivory figurines from China, art pieces made of glass and beaded items (Mary's favorites) from all over the world including Mexico, Africa, China and Thailand make for great conversation topics for those who come to visit.

The Wibergs recently started working with the DuPage Foundation to accomplish some of their charitable goals after being referred from their financial planner, David Hanson of Benjamin F. Edwards in Wheaton, and receiving several great references from friends who already have established relationships with the Foundation.

"We did our homework," said Les. "We checked with our banker, financial planner and our attorney and received repeated referrals of excellence regarding the Foundation."

After meeting with Foundation Director of Development Mike Sitrick to talk through their objectives, the Wibergs chose to establish a charitable gift annuity with a gift of cash and appreciated stock and a donor-advised fund with a gift of whole life insurance. The Wibergs will use the donor-advised fund to recommend grants during their lifetime to charities of their choosing. Meanwhile, the charitable gift annuity will provide

them with a lasting stream of income throughout their lives after which, its remainder will combine with the donor-advised fund to provide perpetual support for specific organizations and causes that Les and Mary select.

"We are strong supporters of Wheaton Drama and the Wheaton Municipal Band," said Les. "These are two great community organizations which deserve our support and we are pleased to have made provision for them through the Foundation."

The Wibergs are also loyal advocates of Central DuPage Hospital and Ronald McDonald House Charities where they recently volunteered and supported the opening of a Ronald McDonald House near Central DuPage Hospital's campus. They have volunteered for the hospital regularly for the past 25 years, which has helped keep them closely connected to their community.

Prior to their retirement (Mary's in 1986 and Les' in 1992), the couple enjoyed rewarding careers as teachers at Oak Park and River Forest High School. Mary taught Home Economics and Les taught History.

"Back in the day, after school was a social time for teachers," said Les. "We used to meet in the faculty lounge for tea and sandwiches. That's when I first met Mary," he reminisced with a sparkle in his eye. Mary and Les were both recruited to teach in Oak Park by the same recruiter.

Mary attended the University of Toledo and earned her undergraduate degree in Home Economics and two master's degrees in Education and Guidance and Counseling. Les received his undergraduate degree in History and English from the University of Wisconsin-Eau Claire and his master's degree in History from the University of Wisconsin-Madison, where he also finished most of the coursework for his doctorate. Before finishing, he was recruited to teach in Oak Park, leaving behind a fellowship and teaching assistant job.



Mary and Leslie Wiberg

Les is an only child and Mary is the youngest of three children. Throughout their marriage, they have lived modestly, always only on one salary thinking that they would "get used to that for when the children came along," said Les. Although they did not have any children, they continued their modest lifestyle, always saving and investing wisely, owning just one car and not being much into computers, as Les explained, "our professions really didn't utilize that technology."

Today, simplicity is still at the heart of the Wibergs' relationship as the couple celebrates 50 years of marriage. A shared "pay-as-you-go" flip phone that is only used for emergencies and a newly-purchased iPad are more than enough to keep the couple going. "I do Google," said Les. "I check the stock market, the weather and maps for our travels. And, I email," he said proudly.

The Wibergs are pleased to be members of the Foundation's Legacy Society and value having a local partner on which they can count to accomplish their wishes and ensure that the causes that matter most to them receive lasting support from the assets that they have set aside to benefit them.

"We appreciate the flexibility of the Foundation and its staff's willingness to help us learn more about DuPage County and ways we can help make a difference," said Les. "We worked hard throughout our lives and, since we have no heirs, we are in a position to help our community," Les said. "And that's important to us."

A Holistic Approach to Early Childhood Education

Investing in early childhood education has been a priority of the DuPage Foundation since its inception. However, the cause has taken on even greater significance to the organization in recent years when it launched its Bright & Early DuPage initiative in November 2013—a unique endeavor designed to bring community resources together to help all DuPage children learn, thrive and succeed.

Community by community, Bright & Early DuPage is engaging and uniting local businesses, organizations, and individuals in collaboration to build awareness for and facilitate access to early childhood education and support services for DuPage children and their families. Having committed hundreds of thousands of dollars in support for the initiative over the next several years, the Foundation has already helped launch and implement three collaboratives in Addison, Bensenville and Wheaton/Warrenville, and a regional hub in DuPage County. Although representing just a small fraction of the initiative's potential (there are 38 municipalities in DuPage County with diverse needs for potential collaboratives) these collaboratives are already having a substantial impact on DuPage County's early childhood education landscape.

"Bright & Early DuPage has brought together schools and early childhood providers in key areas across DuPage and helped them jointly think about what our most vulnerable children and families need to ensure children are ready to succeed when they enter kindergarten," said Theresa Hawley, executive director for the Governor's office of Early Childhood Development. "This strong foundation of partnerships made Addison, Wheaton/Warrenville and West Chicago ideal partners for the State in its successful application for federal Preschool Expansion Grant funds. A new grant that the State announced in December will provide 200 four year olds in DuPage with high-quality, comprehensive, full-day services."

The Federal grant awarded by the Governor's office totals \$20 million per year, renewable for four years, and targets low- to moderate-income families in 18 communities in Illinois. Of the three communities awarded grants in DuPage County, two of them have Bright & Early DuPage collaboratives supported by the Foundation.

"I cannot say enough about the dedication and commitment provided by the DuPage Foundation," said Chuck Wartman, assistant superintendent of Addison School District 4. "Their support has provided us with not only



Bright & Early DuPage provides support to collaboratives to help improve children's kindergarten readiness.

financial assistance but technical as well. Their confidence in our Collaborative's mission is appreciated, and as a result, we are able to ensure that our Addison families have all the resources and support they need to help their children be kindergarten ready."

"Area businesses are recognizing the importance of early childhood education as well and are showing support for the initiative and our local collaboratives," said

Barb Szczepaniak, Foundation director of programs. "Bright & Early DuPage is truly making great strides in every community it touches and has changed the way that schools are doing business."

"Businesses continue to seek workers who are self-directed learners and complex problem-solvers with deductive and mathematical-reasoning skills," according to MaryBeth Marshall, coordinator of the DuPage Workforce Board. "These skills and learning modes are all developed at an

early age and set the stage for the kind of worker a child will become and have a direct impact on his or her ability to be successful in a career."

"Bright & Early DuPage offers a great partnership opportunity for businesses, organizations and individuals," said Foundation President Dave McGowan. "There are many opportunities to get involved, especially when it comes to endowment-building for this program, hands-on committee work and advocacy. We want to grow and sustain the number of collaboratives in DuPage communities where families need our support. We are prepared to launch more collaboratives but sustainable sources of funding are needed to continue the initiative."

For additional information about Bright & Early DuPage, please contact the Foundation at 630.665.5556 or visit www.dupagefoundation.org/be.



**BRIGHT & EARLY
DUPAGE**

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

LinkedIn

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

YouTube

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



DuPage Foundation

3000 Woodcreek Dr., Suite 310
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www.dupagefoundation.org
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