
ANNUAL REPORT

FY 2022



Letter From the Board Chair & CEO

Every year is a journey filled with ups and downs and this year was no different. While there was much uncertainty in the world as we entered fiscal year 2022 (FY22), DuPage Foundation continued raising the quality of life throughout DuPage County thanks to the generosity of our donors and community partners.

DuPage Foundation's *COVID-19 Response Fund* officially closed in FY22 after granting a total of \$1.8 million to not-for-profit organizations in DuPage County and beyond. As COVID strains rebounded, the Annual Benefit pivoted to a virtual format, similar to the previous year, but netted the highest amount raised in its history.

While many of our not-for-profit partners struggled to overcome adversity and provide services for their clients during the pandemic, new partnerships brought more possibilities for the Foundation to continue making grants toward meeting the persistent needs in our community. This year, the Foundation established 35 new funds, welcomed 14 new members to our Legacy Society, and granted \$6.4 million through the *Community Needs Grant Program*, special initiatives, donor-advised grants and designated grants.

We are also more than halfway into our strategic plan and are poised to follow the path to its successful completion. Exploring our voice and finding new ways to engage others in philanthropy and volunteerism are key.

As we map out our future and reflect on our impact, we are thankful for the staff and volunteers for always doing the right thing for the residents of DuPage County and for the donors who support our work.

Thank you for supporting DuPage Foundation and helping us continue **doing a world of good in our own backyard.**[®]



Nathaniel P. Wasson
Chair, Board of Trustees



David M. McGowan, CFRE
President & CEO



TOTAL ASSETS
\$128.8M
(6/30/22)



TOTAL GRANTS
\$6.4M
(FY22)

On the cover: Volunteers work to assemble a garden bed as a part of The GardenWorks Project (gardenworksproject.org)

Contents

Leadership

Board of Trustees	4
Committees	5

Discovering New Partnerships

DuPage Community Transformation Partnership	6
Tellabs Foundation	7

Routing Hope to the Community

Community Needs Grant Program	8
Supporting Community Needs	10
People’s Resource Center	11

Creating a Lasting Legacy

A Legacy to Support Education	12
Legacy Society	13
Inspired to Give	14
New Fund Partners	15
Ways to Give	16

Driving Our Initiatives

Bright & Early DuPage	17
Arts DuPage	18
Next Generation Initiative	19

Tracking Our Activity

Financials	20
------------	----

Exploring Our Voice

Foundation Highlights	22
Staff	23



From May to September, guests to Cantigny Park enjoyed an exhibit of Alebrijes, art created by artists from Mexico.

Board of Trustees (Special thanks to retiring Trustees Wes Becton and Peter Paolilli.)

Officers



Chair
Nathaniel P. Wasson
Hinsdale
HalBar Partners



Vice Chair
William E. Blum
Naperville
Anthony Auto Group



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



Treasurer
Charles E. Saul Jr.
Glen Ellyn
Ret., Bank of America
Merrill Lynch

Welcome New FY2023 Trustees



Krishna Bansal
Naperville
Q1 Technologies



Richard G. Cline Jr.
Wheaton
Calzada Capital
Partners



Julie W. Curran
Hinsdale
Ret., BMO Harris
Bank



Robert L. Fernandez
Downers Grove
Latham & Watkins
LLP



Braden N. Waverley
Hinsdale
RAY ALLEN, Inc.

Trustees



Timothy D. Elliott
Glen Ellyn
Rathje Woodward
LLC



Betsy Goltermann
Elmhurst
KI Industries, Inc.



Andrew O. Johnson
Warrenville
Ret., Captive
Resources LLC



John W. Kaiser Jr.
Glen Ellyn
Cray, Kaiser Ltd.



Gerald E. Lewis Jr.
Naperville
BMO Harris Bank



Diana L. Martinez
Glen Ellyn
McAninch Arts Center



Roger P. McDougal
Glen Ellyn
Northern Trust



Charles B. McKenna
Wheaton
Ret., Crowe
Horwath, LLP



Paul C. Miles
Naperville
We Raise Foundation



Joan S. Morrissey
Wheaton



James G. Myers
Glen Ellyn
Simon/Myers



Dorothy I. O'Reilly
Wheaton



Kevin J. Phillips
St. Charles
Savant Wealth
Management



Sahira P. Sadiq
Oak Brook
Islamic Foundation



Megan M. Shebik
Wheaton
Ret., Kemper
Insurance

Fiscal Year 2022 Committee Members

Members who served July 1, 2021 - June 30, 2022

^ Chair

+ Vice Chair

Arts DuPage

Dorothy O'Reilly^
Diana Martinez+
Julie Curran
Lynn LaPlante
John McKinnon
Joan Morrissey
Tony Payne
Sara Phalen
David Rice
Sheila Rutledge
Jim Sheehan
Peg Sindelar
Robin Tryloff
Les Wiberg

Audit

Charlie McKenna^
John Kaiser+
Norm Beles
Betsy Goltermann
Barry Horek
Chris Janc
Mary Pat Wesche

Benefit

Bill Blum^
Dorothy O'Reilly+
Lisa Brose
Christine Fenne
Tracey Kreiling
Arica LeFevour
Diana Martinez
Katelyn Moon
Nathan Ronchetti
Kim Ulfing

Board Development

Roger McDougal^
Peter Paolilli+
Bill Blum
Del Koch

Bright & Early DuPage

Deb du Vair^
Erin Cetera+
Sandy Biegel
Cleo Burtis
Lu Doty

Janet Hodge
Candace King
Joan Morrissey
Chuck Wartman
Joyce Webb
Sally Winger

Bylaws

Del Koch^
Megan Shebik+
Norm Beles
John Kaiser

Executive

Nate Wasson^
Bill Blum+
Del Koch, Secretary
Ted Saul, Treasurer
Charlie McKenna
Kevin Phillips
Megan Shebik

Financial Operations

John Kaiser^
Ted Saul+
Matthew Booth
Andy Johnson
Laurie McMahon
Gene Ognibene
Peter Paolilli

Glen Ellyn Fund

Tim Elliott
Phil Hartweg
Mike Malone
Joyce Webb

Grant

Megan Shebik^
Roger McDougal+
Tim Elliott
Steve Ewoldt
Betsy Goltermann
Leanne Harbaugh
Kendra Hyett
Chris Janc
Paul LeFort
Gerald Lewis
Laurie McMahon
Laurie Reifel
Sahira Sadiq

Investment

Kevin Phillips^
Dan Bukowski+
Pat deRosset
Mike Havala
Dan Maguire
Charlie McKenna
Ted Saul
Steve Shebik
Joan Vilim
Braden Waverley

Marketing

Margie Lawless^
Anna Clarke+
Phil Bellini
Conor Gee
Paul Miles
Darrien Murphy
Jim Myers
Gino Tomaro

Next Generation Initiative

Karen Fleming^
Henry Kaskov+
Kate Bousum
Brendan Connolly
Amber Drew
Sara Howland
John Hughes
Derek Johnson
Kenzie Kuhn
Juliana Maller
Devon Moon
Mitha Rao
Luke Widmer

Professional Advisor

Neil Goltermann^
Brandy Harrington+
Kim Coogan
Sachin Gandhi
Bill Hassett
Nancy Hermann
Sandy Higgins
Del Koch
Brien Nagle
Natalie Perry
Alice Wood

Strategic Planning

Jim Myers^
Wes Becton+
Deb du Vair
Denice Gierach
Del Koch
Charlie McKenna
Joan Morrissey
Ernie Mrozek
Megan Shebik
Nate Wasson

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*
Denice A. Gierach
George N. Gilkerson Jr.
Willis M. Gillett*
Janet A. Hodge
Joseph F. Kindlon*
Jack T. Knuepfer*
Richard W. Kuhn
Paul J. Lehman
Daniel Maguire
Brooks McCormick*
Laurie K. McMahon
Joan S. Morrissey
Vincent A. Naccarato
Nancy E. Sindelar*
Ralph Smykal*
Charlie A. Thurston*
Mary Eleanor Wall*
Joseph L. Weidenbach
Carson R. Yeager

* Remembered

A Transformative Grantmaking Partnership



On February 22, 2022, DuPage County presented a check for \$10.6 million to DuPage Foundation to mark the launch of a strategic grantmaking partnership known as the DuPage Community Transformation Partnership.

As part of its community recovery plan to combat the lingering effects of COVID-19, DuPage County sought a strategic partner to augment its efforts to support not-for-profit organizations working in social services. On January 25, 2022, the DuPage County Board voted to solidify a grantmaking partnership with DuPage Foundation, executing an agreement to allocate \$10.6 million in federal funds to the Foundation to implement and manage a five-year grant program to support social service not-for-profits helping DuPage County residents most severely impacted by the COVID-19 pandemic.

Known as the **DuPage Community Transformation Partnership (DCTP)**, the program will focus on providing assistance in the areas of food insecurity, housing instability, mental health, and substance use disorder.

“We were thrilled the County selected us as a partner to administer a grant program of this magnitude,” said DuPage Foundation President & CEO **Dave McGowan**. “We appreciate the trust in the Foundation as these funds will significantly increase our impact so we can more aptly meet the needs of those in our community still reeling from the debilitating effects of the pandemic.”

In February, the DCTP formed a committee comprised of Foundation and County staff, Board members and volunteers to design the grant program and review applications.

“When we first convened as a committee, we wanted to create a grant program that would fulfill the most pressing needs of our community,” said DuPage Foundation Vice President for Programs **Barb Szczepaniak**. “The applications we received really told a story of what people were going through and the challenges brought on by the pandemic. While we are ecstatic to provide this level of assistance, there are still many issues facing our community that are persisting.”

Two grant application opportunities have been established to address both immediate and long-term needs:

- Immediate Intervention grants provide financial resources to enable organizations to respond to immediate needs of their clients or to quickly increase the capacity to deliver efficient services and resources.
- Transformational grants support evidence-based programs focused on long-term solutions to build capacity, improve efficiency and ensure efficacy of programs.

To be eligible to apply for a DCTP grant, an organization must be a 501(c)(3) social service not-for-profit that provides assistance to the residents of DuPage County in the areas of food insecurity, housing instability, mental health, or substance use disorder.

Learn more at dupagefoundation.org/DCTP.

Tellabs Foundation Cements Its Legacy With Transfer to DuPage Foundation



Pictured left to right: DuPage Foundation Executive Vice President for Advancement Mike Sitrick and President & CEO Dave McGowan with Tellabs Foundation Board Members Denise Callarman, Dr. Stephanie Pace Marshall, Carol Coghlan Gavin (executive director & president), and Christopher Birck, along with DuPage Foundation Board Chair Nate Wasson.

In 2021, DuPage Foundation and **Tellabs Foundation** solidified a partnership to bolster the grantmaking impact of both organizations.

Tellabs, Inc., a global network technology firm providing services to both private and governmental agencies, was founded in 1975 by six electrical engineers, including the late **Michael J. Birck**, former chairman & CEO.

In the late 90s, Tellabs, Inc. made some successful investments and its board decided to use the proceeds to start a foundation and benefit the local community. The Tellabs Foundation was established in 1997 with the mission to advance specific, strategic endeavors in communities where Tellabs employees lived and worked, while helping build the capacity of not-for-profit organizations to develop sustainable initiatives, primarily in the areas of education, health and the environment.

In late 2013, Tellabs, Inc. was sold, but the Tellabs Foundation continued to operate independently, having made more than \$50 million in grants since its inception. However, as many private foundations become burdensome to manage, its board sought a partner to carry on the Tellabs Foundation legacy.

“After making the decision to wind up our activities, it was important to our board to find a

successor public charity well equipped to carry on grantmaking in Tellabs Foundation’s traditional areas of education, health, and the environment, while overseeing the expansion of its support to address new areas of high community need, including food insecurity, housing, and social justice disparities,” said **Carol Coghlan Gavin**, former Tellabs Foundation executive director and president.

At the end of 2021, Tellabs Foundation’s residual assets of approximately \$3.3 million were transferred into a permanently-endowed field-of-interest fund for DuPage Foundation’s *Community Needs Grant Program (CNGP)*.

Michael Birck passed away in 2015. His son, **Christopher Birck**, served on the Tellabs Foundation board until its dissolution and is now the *Tellabs Foundation Fund* of DuPage Foundation representative.

“I couldn’t be more pleased with the creation of this partnership,” said Birck. “As a DuPage County resident, it’s important to me that our community has charitable resources at its disposal to address emerging and changing needs. I am proud to entrust the Tellabs Foundation legacy to such a worthy steward that will ensure its impact will continue for generations to come. It’s special for me as it also represents my dad’s legacy.”

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.

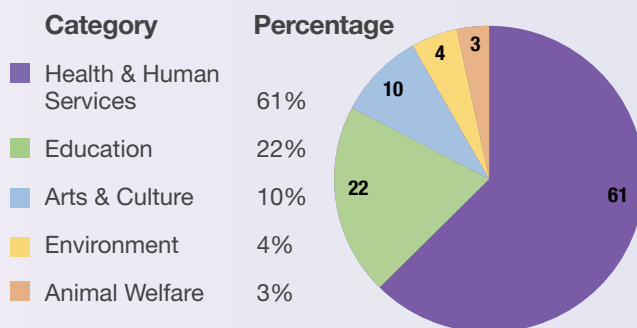
Unrestricted Funds

- 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

- 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
- Mental Health Fund
- Abigail Catherine Mueller Children’s Fund
- Douglas A. Schooley Memorial Fund
- Sindelar Family Fund
- Donald and Dianne Skeet Fund
- Tellabs Foundation Fund
- Utchen Fund for Persons with Disabilities

Total FY22 Community Needs Grants: \$1,110,573



102 not-for-profits applied for Community Needs grants in FY22. By combining *Community Needs* funding with donor-advised fund grant recommendations, the Foundation funded 66 percent of the proposed projects, for a total of \$1,110,573 in grants.

Health & Human Services: \$678,380

Bridge Communities, Inc.	25,000
CASA of DuPage County, Inc.	20,000
Catholic Charities, Diocese of Joliet	25,000
Center for Advancing Domestic Peace	2,500
Chicago Dental Society Foundation	20,000
DayOne PACT	23,000
Donka, Inc.	10,000
DuPagePads	25,000
Easterseals DuPage & Fox Valley	25,000
Evangelical Child & Family Agency	7,500
Family Focus	15,000
HCS Family Services	8,155
Hope’s Front Door	2,500
Little Friends, Inc.	11,225
Loaves & Fishes Community Services	24,500
LOVE Christian Clearinghouse	10,000
Mayslake Village	5,000
NAMI DuPage	25,000
Neighborhood Food Pantries	25,000
Northeast DuPage Family and Youth Services	25,000
Northern Illinois Food Bank	25,000
Outreach Community Ministries	25,000
Path To Recovery Foundation	10,000
People’s Resource Center	26,000

Poised For Success	2,500
Ray Graham Association	25,000
SamaraCare	25,000
Sharing Connections	25,000
Spectrios Institute for Low Vision	15,000
Teen Parent Connection	20,000
The Community House	25,000
The Outreach House	14,000
Variety the Children’s Charity of Illinois	23,500
Warm Coats for Cool Kids	13,000
West Suburban Community Pantry	25,000
Youth Outlook	20,000
YWCA Metropolitan Chicago	25,000

Education **\$248,693**

Alive Center	15,000
Career & Networking Center	12,500
Child’s Voice	2,500
CREO DuPage	10,000
DuPage Children’s Museum	18,000
DuPage Federation on Human Services Reform	20,000
Exodus World Service	15,000
Giant Steps	15,000
Glen Ellyn Children’s Resource Center	25,000
H.O.M.E. DuPage, Inc.	25,000
KidsMatter	25,000
Literacy DuPage	20,000
Resilient, NFP	15,000
The Community House	15,000
Turning Pointe Autism Foundation	7,693
Your Children’s Bookshelf	8,000

Arts & Culture **\$109,500**

b.unity	12,500
BrightSide Theatre	20,000
Buffalo Theatre Ensemble	20,000
DuPage County Historical Museum Foundation	2,500
DuPage Symphony Orchestra	15,000
Elmhurst Art Museum	20,000
Elmhurst Symphony Orchestra	2,500
Glen Ellyn-Wheaton Chorale	3,000
Immigrant Solidarity DuPage	14,000

Environment **\$45,000**

Morton Arboretum	15,000
SCARCE	25,000
Three Fires Council, BSA	5,000

Animal Welfare **\$29,000**

Feral Fixers	7,000
Fetching Tails Foundation	12,000
West Suburban Humane Society	10,000



Our sincere thanks to the donors and donor-advised fund representatives who recommended grants totaling \$461,773 to support *Community Needs*.

- Andi Stelzner Fund
- Beles Family Fund
- Betty M. Bock Fund
- Cleo F. Burtis and James E. Comerford Fund
- Donor-Advised Fund for Needy Children
- Edward & Minnie Ceragioli Fund
- Freedman-Sindelar Family Fund
- Harbaugh Family Fund
- History DuPage Fund
- JCS Arts, Health and Education Fund
- Kenneth Brooks Holland Memorial Fund
- Linda and Clark G. Carpenter Fund
- Martha J. Johnson Fund
- Mary Eleanor and James M. Wall Fund
- Paula K. Partipilo Fund
- Robert and Laurie McMahon Family Fund
- Silver Heart Foundation
- Sue Wallace Fund

Pass-Through Gifts from:

- The McWethy Foundation
- Molex
- Joan Morrissey
- Betty Smykal

Visit dupagefoundation.org/CNGP for grantee program descriptions.

Supporting Community Needs: Steve & Megan Shebik



“

We want our children and their children to be able to provide ongoing support for the needs in DuPage County.”

- Steve Shebik

Steve and Megan Shebik have been enduring champions of philanthropy for decades. Through their time, talent and treasure, they have supported local not-for-profit organizations, including DuPage Foundation and its flagship *Community Needs Grant Program*.

The Shebiks have placed a strong emphasis on philanthropy and giving back to their community. In 1996, they established the *Shebik Family Fund for Basic Human Needs*, one of DuPage Foundation’s first donor-advised funds, to carry out a portion of their charitable goals and support programs focused on providing food, clothing and shelter.

Throughout her tenure as the Grant Committee chair, Megan helped the Foundation make crucial funding decisions, including the rapid deployment of \$1.8 million in grants to local not-for-profit organizations during the onset of COVID-19.

“DuPage is statistically one of the wealthiest counties in Illinois, however there are a surprising number of people here who do not have enough food to eat or a place to call home,” said Megan.

While the Shebiks’ initial focus has always been supporting basic needs, they have since expanded their giving to include education, the environment, physical and mental health, and the arts. In 2012, they established the *History DuPage Fund* to support and preserve the rich history of DuPage County and highlight its importance to others.

“Our family roots in DuPage County are deep,” said Steve. “In 1831, my family was among the first settlers in DuPage County. I observed my grandfather and father and learned how they helped people. That really touched me and I’ve carried it through my life.”

The Shebiks always included their children in philanthropic activities – from volunteerism to donating – teaching them the importance of service and community. They recently opened another donor-advised fund at the Foundation for their children to recommend grants benefitting the causes they care about most.

“We want our children and their children to be able to provide ongoing support for the needs in DuPage County,” said Megan.

Together, the Shebiks have created a foundation of a lasting legacy that has already made significant impact in DuPage County and beyond.

“Everyone should have opportunities in life,” said Steve. “It’s necessary for people to step up to help. We have been fortunate in our careers and in our lives and are able to provide that help.”

“I hope we will encourage others to give back and meet the needs that are always existing, ever-changing and growing within our community,” said Megan.

People's Resource Center: Meeting the Needs of the Community Since 1975



“

Because of DuPage Foundation's support, neighbors can move past this hurdle and reach their potential in our community.”

- Jeni Fabian, President and CEO

For nearly 50 years, People's Resource Center (PRC) has been bringing neighbors together to respond to hunger and poverty in DuPage County. PRC's staff and volunteers respond to basic human needs, promote dignity and justice, and create a future of hope and opportunity for all who seek services.

From offering nutritious food and clothing to providing job assistance and therapeutic art classes, PRC connects people with resources.

One of those resources has consistently been a barrier for PRC neighbors to improve their situations, secure employment and care for their families: reliable transportation. In DuPage County, public transportation options are limited by schedule and location making individuals highly reliant on access to working vehicles to take care of their needs. Last year, PRC welcomed a new program to strengthen their ability to respond to transportation challenges.

PRC now offers Care for Cars, a program dedicated to providing affordable car repair for low income residents in order to conduct job searches or retain employment. The type of repairs approved varies according to car age and mileage, as well as, mechanic recommendation.

In the spring, PRC received a grant from DuPage Foundation's *Community Needs Grant Program* to support the program.

“An unexpected and costly repair can derail a family's finances,” said Jeni Fabian, PRC's CEO, “Because of DuPage Foundation's support, neighbors can move past this hurdle and reach their potential in our community.”



Previous funding from the *Community Needs Grant Program* helped PRC expand its space to welcome more residents to assist their pressing needs at their Westmont and Wheaton locations.



Nearly 26,000 DuPage residents access PRC services each year.

To learn more, please visit peoplesrc.org.

Betty and Jerry Bradshaw: A Legacy to Support Education



“

My mom would be over the moon to know she was helping people achieve their dreams through this scholarship.”

- Molly Boed

In 1989, the late **Jerry and Betty Bradshaw** became the first members of DuPage Foundation’s Legacy Society. Jerry was a co-founder of DuPage Foundation and believed in the power of a community foundation to support the growing needs in DuPage County.

To honor the memory of their daughter, Megan, Jerry and Betty donated a life insurance policy to DuPage Foundation to endow the *Megan Bradshaw Memorial Scholarship Fund* in perpetuity. The Bradshaws recognized the importance of providing educational opportunities for people living in DuPage County long into the future.

In 2007, Betty, a DuPage Foundation Trustee Emerita, included another provision in her bequest to create a second scholarship fund. When Betty passed away last year, proceeds from her policy were transferred to DuPage Foundation to fund a scholarship endowment in her name.

The *Betty Bradshaw Scholarship Fund* benefits single parents in DuPage County who are continuing their education and studying medical sciences at College of DuPage (COD). Recipients of the scholarship receive \$6,000 – covering two years of tuition at COD. The inaugural recipients of the Betty Bradshaw Scholarship were announced in the spring.

While Betty’s bequest also included support for **Arts DuPage**, a DuPage Foundation initiative, and the *DuPage Forever Fund*, an unrestricted fund providing grants in the areas of health & human services, education, arts & culture, the environment, and animal welfare through the Foundation’s *Community Needs Grant Program*, her focus was always on supporting education – especially for single parents.

“Many people cannot afford to go to school without some extra help,” said Betty and Jerry’s daughter, **Molly Boed**. “My mom would be over the moon to know she was helping people achieve their dreams through this scholarship.”

“

I cannot begin to tell you how much this means to me, but I want to assure you I intend to use your generosity in a way that respects the lives of Betty, Jerry, and Megan Bradshaw, as well as the long list of individuals that have supported the DuPage Foundation over the years”

- Jordan W. (2022 Wheaton North graduate)

Betty and Jerry’s gift also created the *Jerry Bradshaw Memorial Scholarship Fund* which benefits College of DuPage students enrolled in a health science program.

Legacy Society Ensures Future Impact

DuPage Foundation's 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, 2022, are as follows:



Anonymous (99)	Jane Henderson*	Nancy E. Sindelar*
Cushman L. and Pamela C. Andrews	Alan D. and Jane M. Hoffmann	Michael R. and Elizabeth E. Sitrick
Phillip L. and Judith E. Barnett	Sharon A. and James M. Huck Jr.	Dianne M. Skeet*
Howard C.* and Shirley* Benson	Elizabeth L. Jens*	James M. and Ruth Ann Snodgrass
Herbert J. Bock*	Melvin E.* and M. Joyce* Johnson	John W. Squire*
Ronald R. Bork*	Arthur J.* and Mary* Kolar	David A. Stelzner and Nicki J. Krafft
Jerry C.* and Betty J.* Bradshaw	Kathleen Lamonica Krochock	Lenora J. Su, M.D.
Jane Kern Brooks and Donald A. Brooks*	William E. Kronenberg	Adele M.* and Daniel R. Szymanski Sr.
Nancy E. Bruss*	Richard W. and Mary S. Kuhn	Charlie A. Thurston*
John J. Bryant*	Richard J. and Susan M. Lamb	Mark M. and Barbara L. Turner
Stephen M. and Emily L. Burt	Paul F. and Eileen M. LeFort	Theodore M. Utchen*
Cleve E. Carney*	Paul J. and Coleen J. Lehman	Mary Eleanor* and James M.* Wall
Linda S. Carpenter	Estate of Grace Lopatka*	Michael and Deborah A. Welgat
Susanne S. Cassell*	David M. and Mary A. McGowan	Donald* and Dorothy B.* White
Ruth* and Hugh* Christ	Charles B. and Kathleen A. McKenna	Les A. and Mary E. Wiberg
Edward S. and Shirley J. Crawford	Robert V.* and Laurie K. McMahon	Carson R. and Dawn C. Yeager
RC and Lorraine Crompton	Jack E. and Kathleen G. Mensching	
Donald T. Dennerlein	William H. Mitchell	
James E. and Marie A. Drasal	Joseph S.* and Joan S. Morrissey	
Lloyd E.* and Mary C.* Eckerson	Ernest J. and Diane M. Mrozek	
Burton E.* and Patricia A. Ericson	Karl W. and Jeanne M. Mueller	
Douglas G. and Martha R. Eyles	Ramon A. Mulholland*	
Diane V. Fox*	Gwendolyn S. Mundell	
Vincent J. and Susan L. Furman	Charlotte L. Mushow	
James Gates*	Brien J. and Carolyn J. Nagle	
Richard E. and Elizabeth W. Geyer	Jean C. Neill*	
Leonard J.* and Barbara A. Giblin	Timothy J. Newmann	
Carrie A. and Robert G. Gibson	Ellen Noth	
George N. Gilkerson Jr.	Alyse S. and Jeffery A. Pleiter	
Willis M. Gillett*	Steven J. and Laurie Reitman	
Howard G. Goldstein and Peggy A. McGrath	Albert A.* and Mimi Rose	
James W. Hebert	Michael J. and Mary T. Schroeck	
	Thomas R. Scott	
	F. Ronald and Carol L. Seager	
	Steve E. and Megan M. Shebik	

**Remembered*

14

NEW LEGACY SOCIETY MEMBERS:

- Anonymous (11)
- Nancy E. Bruss
- James W. Hebert
- Michael J. and Deborah A. Welgat

Inspired to Give: Don and Diane Field



“

“We have an obligation to help those who are less fortunate than us,” said Don. “I feel like I am doing my duty as a human being.”

- Don Field

For Don and Diane Field, philanthropy is not only a way to give back to the causes they care about, but to also inspire the next generation of their family.

The Fields met at a company baseball game in the late 70s. Don, a retired engineer, grew up in Villa Park and had strong ties to DuPage County as a child. When the Fields married in 1979, they moved to Naperville for its family-oriented environment.

While raising their two daughters, Diane was very active in the community. She taught Sunday school, served as a Girl Scout leader, and volunteered at church and the school library.

“It was important to me to give something back to those people who were involved with teaching my kids,” said Diane.

Don was driven to give back after watching his mother helping neighbors and volunteering at local organizations – even while she battled terminal kidney disease.

“I give full credit to my parents – especially my mother – for inspiring me to be philanthropic,” said Don. “She would explain that there were people worse off than us and she wanted to help them. And that has stuck with me all these years. I give because I want to help, and part of that is a tribute to my mother and how she lived her life.”

When Don retired 18 years ago, he and Diane decided to set aside 10 percent of their net worth into a donor-advised fund at The Chicago Community Trust. The Fields moved their fund to DuPage Foundation in late 2021 to learn more about the pressing needs in DuPage County.

“As we’ve gotten older, we knew our fund would be managed by our daughters sooner than later,” said Don. “That was the most logical time for us to move our fund from Chicago to DuPage, as our giving is heavily focused in DuPage County more so than any other area.”



Don and Diane Field with their daughters, Leah, pictured left, and Andrea, pictured center.

Roughly half of the Fields’ philanthropy is geared toward their church and related organizations, and they also support child care and social service organizations. The Fields also endowed a scholarship fund at the University of Illinois – Don’s alma mater – and support the colleges their daughters attended.

“There are always going to be people in need and it’s the hardest thing to do – to ask for something,” said Diane. “You don’t always know if you’re making a difference, but I think you try, and try your best.”

“We have an obligation to help those who are less fortunate than us,” said Don. “I feel like I am doing my duty as a human being.”

Welcome, New Fund Partners

We are grateful to our many donors and agency partners for their confidence and trust in our stewardship.

NEW FUNDS ESTABLISHED: 35

Agency Endowment & Designated Funds

- Bridge Communities, Inc. Charitable Gift Annuity Fund IV
- DuPage Symphony Orchestra Agency Fund
- DuPage Symphony Orchestra Reserve Fund
- Junior League of Kane and DuPage Counties Agency Fund
- Loaves & Fishes Community Services Agency Fund
- LOVE Christian Clearinghouse Agency Fund
- Martin and Patricia Jahn Fund of Bridge Communities, Inc.
- Martin and Patricia Jahn Fund of Midwest Shelter for Homeless Veterans
- Neighborhood Food Pantries Agency Fund
- Paul N. Burgess Fund
- Variety of Illinois Agency Fund
- Wheaton Public Library - Theodore M. Utchen Agency Fund

Donor-Advised Funds

- Anonymous (1)
- Arnold A. DeLuca & Karen E. Barlow Fund
- Dale and Teresa Muir Charitable Fund
- Dare Family Fund
- Dave and Mary McGowan Fund
- Donald & Diane Field Charitable Fund
- Fissinger Family Fund
- Kamm Family Fund
- LAMP Fund
- Levin Family Fund
- Luginbill Family Fund
- Nagle Family Fund
- Robinwood Legacy Fund
- Rosalie Eiler Family Charitable Fund
- Welgat Family Fund
- Widmer Family Fund

Field-of-Interest Funds

- DuPage Community Transformation Partnership Fund
- Tellabs Foundation Fund

Operating Funds

- DuPage Community Transformation Partnership Operating Fund

Scholarship Funds

- Betty Bradshaw Scholarship Fund
- Jerry Bradshaw Scholarship Fund
- Lombard Area AAUW Dickson/Mosillo Scholarship Fund
- Tara Layne Odishoo Scholarship Fund

Remember Us in Your Estate Plan

When making or updating your will, consider a gift to 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.

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 assets were 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. Donor-advised funds can also be set up at the Foundation to work as side-cars to private foundations to facilitate grant anonymity when desired, provide 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

These 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 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.

Want to give another type of asset not listed here? Call **DuPage Foundation's Advancement Team** at **630.665.5556** to explore your options.

Reshaping Early Childhood Engagement in Addison



A DuPage Foundation Initiative

Last year, **Mary Haley**, executive director of Addison Partners for Play, Learning and Education (APPLE), formerly known as Addison Early Childhood Collaborative, applied for a DuPage Foundation grant with one goal in mind: to increase parent engagement surrounding early childhood programs.



APPLE family advocate, Rosie Galvez (left) and project director, Mary Haley (right).

“As I got to know community members and parents, I realized that my own outreach was not enough,” said Mary. “I do not speak Spanish. I literally don’t speak the language of the

people we’re trying to connect with and I needed to find a way to get parents engaged.”

After receiving the grant, Mary hired **Rosie Galvez**, a local Addison parent with two children, to be APPLE’s family advocate. Rosie’s eight-year-old daughter was a previous program participant which led her to meet Mary and get involved.

Rosie started her role in November, 2021, and went to the annual meet and greet at the Early Learning Center in Addison. In a short period, she had increased APPLE’s Facebook followers from approximately 135 to several thousand, but quickly learned more about the communication gaps parents were facing.

“I love talking to people,” said Rosie. “While walking around, I would ask parents if they follow us on Facebook. Many didn’t have any form of social media.”

That discovery led Rosie to add another layer of communication to her arsenal. She started a What’s App group to send text message updates to more than 60 parents on a regular basis.

“There are a lot of parents who don’t know about the resources available to them in the community, and I wanted to help,” said Rosie.

As part of her grassroots efforts, Rosie handed out information at three local businesses that cater to the Hispanic community, including establishing a “Literacy in the Laundromat” children’s corner at Addison Coin Laundromat. After Rosie got approval from the owner, she posted signage that included simple activities for parents to do with children like count the pairs of socks they are folding or identify the colors of each article of clothing.

“The kids are engaged in reading and learning while at the laundromat with their parents,” said Rosie.

“It’s a privilege to have Rosie working with us,” said Mary. “Sometimes I can’t tell if she’s talking to a complete stranger or her best friend. She just has that touch.”

Rosie’s engagement in the community also deepened APPLE’s relationship with staff at the Henry Hyde Resource Center, located in the lowest income neighborhood in Addison with the highest percentage of kids enrolled in free and reduced lunch. A family event was hosted late in the summer, and thanks to Rosie and Mary’s involvement with the school district’s family liaison team, donated backpacks filled with school supplies were given to the children at the event.

“It’s in our best interest as a society for children to be educated so they can be happy and productive human beings when they’re adults,” said Mary.

“When we inform parents with ways to impact their child’s development, it can genuinely change the trajectory of that child’s life.”



On June 24, more than 130 parents and children from the Addison community attended a DuPage Children’s Museum pop-up event at the Addison Library thanks to Rosie’s individual outreach.

Arts DuPage ChARTer Membership Program



A DuPage Foundation Initiative

Last fall, Arts DuPage launched its ChARTer membership program to further engage artists and arts lovers in the region as well as generate revenue for the initiative. Word spread quickly, and 52 individuals and arts organizations paid their dues within the first 30 days. While membership provides several benefits – including heightened visibility and discounted admission to events at participating venues – supporters favored the exclusive member tours offered at no cost.

Tour #1: The inaugural Arts DuPage ChARTer membership meeting was held at the McAninch Arts Center at College of DuPage to introduce the program and its perks. Attendees were treated to a private backstage tour of the *Frida Kahlo: Timeless* exhibit.



Tour #2: Arts DuPage members explored the fascinating world of gemstones and rocks as they toured the **Lizzadro Museum of Lapidary Art** in Oak Brook. Museum Director Dorothy Asher led the way and presented the backstory of the Green Jade Pagoda, Castle Lizzadro and the Artful Soul of Faust exhibit.



Tour #3: Sunshine and moderate temperatures welcomed Arts DuPage members when they met with six resident artists from Mexico City who were the creative team behind the *Alebrijes: Creatures of a Dream World* exhibit at Cantigny Park. Sara Phalen, board chair of the Mexican Cultural Center DuPage, led the way and shared insights and anecdotes on the artists and their sculptures.



Membership options are available at dupagefoundation.org/ArtsMembership.



The new Arts DuPage membership program expands our reach to art aficionados and allows them to connect on a deeper level to the cultural offerings in DuPage County. Members are invited to exclusive behind-the-scenes tours and talks with artists in the community, building engagement and a small source of revenue to promote the arts in DuPage.”

- Diana Martinez, director, McAninch Arts Center Chair, Arts DuPage Advisory Committee and DuPage Foundation Trustee

Next Generation Initiative

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 charitable giving. Today, NGI welcomes members from different backgrounds and age groups who share a common purpose: to connect, learn and give back as they make a difference in DuPage.

Next Generation Initiative

DuPage Foundation

Since its inception, NGI has granted \$122,146 to local not-for-profit organizations.



Held three in-person socials:

August 2021
Featuring Ray
Graham Association

April 2022
Featuring West
Suburban Humane
Society

June 2022
In partnership with
DuPage County Bar
Association, featuring
Poised for Success



Hosted NGI's fifth annual Charity Trivia Night virtually in February 2022 with 23 teams (approximately 160 players).

Grants Awarded: \$16,396



CASE – Glenbard
West Early Childhood
Collaborative **\$2,000**



Ray Graham
Association
\$4,351



West Suburban
Humane Society
\$4,045



Poised for
Success
\$6,000

Memberships

49 individuals and families joined in calendar year 2021 and 55 have joined in 2022 as of 9/2022

NGI Endowment

Raised \$31,855 in sponsorships, membership dues, and gifts to defray the cost of NGI events, make grants and build grantmaking endowment.

2022 Silver Corporate Sponsor



2022 Bronze Corporate Sponsor

FORV/S

Learn more at dupagefoundation.org/NGI.

Statement of Financial Position

ASSETS

	<u>June 30, 2022</u>	<u>June 30, 2021</u>
Cash and Equivalents	\$ 4,025,448	\$ 1,924,849
Investments	123,170,805	121,548,031
Pledges Receivable	118,800	287,000
Charitable Lead Trust Receivable	112,074	146,057
Prepaid Expenses	91,660	32,094
Cash Value of Life Insurance	114,166	473,136
Other Assets	-	73,200
Property and Equipment	1,182,246	1,218,884
	<hr/>	<hr/>
Total Assets	\$ 128,815,199	\$ 125,703,251

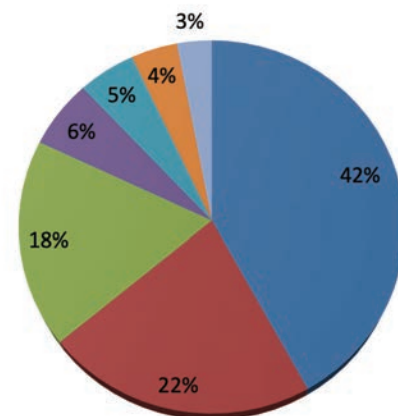
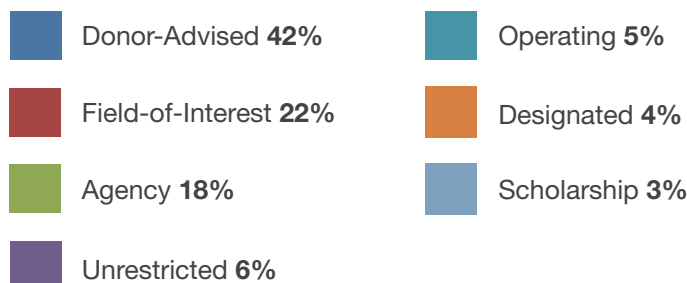
LIABILITIES AND NET ASSETS

Liabilities

Agency Funds	\$ 23,531,409	\$ 24,401,241
Annuity Payable	71,881	70,586
Accrued Expenses	285,280	117,341
Deferred Revenue	10,588,571	-
	<hr/>	<hr/>
Total Liabilities	\$ 34,477,141	\$ 24,589,168

Net Assets

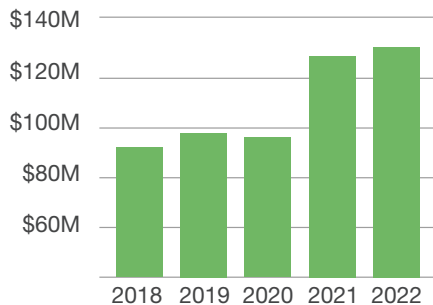
Without Donor Restrictions	\$ 14,502,998	\$ 16,098,587
With Donor Restrictions	79,835,060	85,015,496
	<hr/>	<hr/>
Total Net Assets	\$ 94,338,058	\$ 101,114,083
	<hr/>	<hr/>
Total Liabilities and Net Assets	\$ 128,815,199	\$ 125,703,251



Statement of Activities

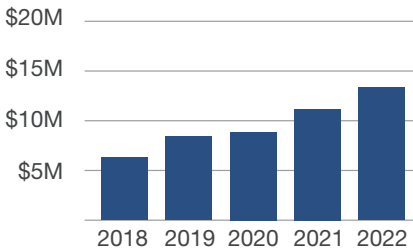
	<u>Without Donor Restrictions</u>	<u>With Donor Restrictions</u>	<u>Total FY 2022</u>	<u>FY 2021</u>
Revenue				
Gifts, Bequests, and Grants	\$ 624,543	\$ 12,644,600	\$ 13,269,143	\$ 10,222,632
Net Investment Gains	(1,923,712)	(13,246,798)	(15,170,510)	20,756,761
Investment Income	126,060	3,030,636	3,156,696	1,391,599
Fee Revenue	244,559	-	244,559	150,648
Net Assets Released from Restrictions	7,608,874	(7,608,874)	-	-
Total Support and Revenue	\$ 6,680,324	\$ (5,180,436)	\$ 1,499,888	\$ 32,521,640
Expenses				
Grants Awarded	\$ 6,405,271	\$ -	\$ 6,405,271	\$ 8,658,723
Grantmaking Activities	632,431	-	632,431	596,178
Management and General	589,936	-	589,936	603,719
Fundraising	648,275	-	648,275	537,522
Total Expenses	\$ 8,275,913	\$ -	\$ 8,275,913	\$ 10,396,142
Increase (Decrease) in Net Assets	\$ (1,595,589)	\$ (5,180,436)	\$ (6,776,025)	\$ 22,125,498
Net Assets - Beginning of Year	\$ 16,098,587	\$ 85,015,496	\$ 101,114,083	\$ 78,988,585
Net Assets - End of Year	\$ 14,502,998	\$ 79,835,060	\$ 94,338,058	\$ 101,114,083

Assets



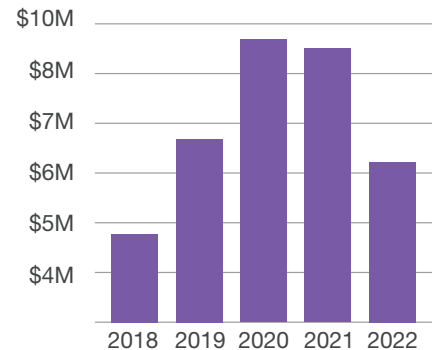
FY18	\$ 94,927,711
FY19	\$ 98,928,275
FY20	\$ 97,402,516
FY21	\$ 125,703,251
FY22	\$ 128,815,199

Contributions



FY18	\$ 5,947,801
FY19	\$ 7,019,619
FY20	\$ 7,769,826
FY21	\$ 10,222,632
FY22	\$ 13,269,143

Grants



FY18	\$ 4,819,615
FY19	\$ 6,756,791
FY20	\$ 8,814,664
FY21	\$ 8,658,723
FY22	\$ 6,405,271

The fiscal year 2022 audit for 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.

DuPage Foundation Highlights of FY2022



Digital Ad Campaign Launched 5.18.22

Reporting through 6.30.22

Total impressions: **918,169**

Web traffic: **21% increase**



Overall traffic to dupagefoundation.org

Average monthly visits: **40% increase in FY22**

July 2021 – December 2021: **2,300**

January 2022 – June 2022: **3,200**

New Ads Inspire Donors to Name Their Cause

At the start of FY22, the talented team of **Simon/Myers** donated 110 creative hours to DuPage Foundation to design a fresh advertising concept for its external media. Spearheaded by Simon/Myers Chief Creative Officer and DuPage Foundation Trustee Jim Myers, the Simon/Myers team presented the Foundation with four compelling concepts – capturing its mission and array of services in each.



While it was a tough choice to select one, the Foundation chose the “Name Your Cause” campaign. The ad, set on a field of white space, encourages donors to think about how they would fill in the blank line related to the causes they love. The idea behind the exercise asks donors to visualize their philanthropy with more depth than breadth: what do you want *your* giving to accomplish? After the cause is identified, the ad showcases the Foundation’s core talent of being a connector, administrator and expert of local philanthropy, setting the donors’ minds at ease.

Since implementing the new ad copy, DuPage Foundation featured it in several magazines and philanthropy guides, and launched a digital ad campaign using an animated format of the ad.

Increased Engagement with Professional Advisors

Before the end of FY22, DuPage Foundation launched **Foundation Insights**, an e-newsletter designed to deliver the latest news and upcoming event notices relevant to the professional advisor community. The inaugural issue included key legislative updates, savvy charitable giving strategies, and common planning pitfalls to avoid. The insights are intended to support advisors while helping their clients achieve their charitable goals efficiently and effectively. Learn more at dupagefoundation.org/advisors.

Continuing Stories of Local Impact

DuPage Foundation continued producing “**Leaders & Legacies: Stories of Local Impact**,” an article series in the *Daily Herald* featuring stories of individuals, families and businesses whose generosity and commitment to philanthropy have made a lasting difference in our community. Features in FY22 included Jerry and Betty Bradshaw, Cleve Carney, Joe and Heather Chura, Daniel L. Goodwin, Doug and Fran Mains, Honorable Ken Moy Sr. and Patricia Moy, Dan and Ada Rice, Dr. Tom and Shirley Scott, and Jim and Mary Eleanor Wall. View the entire archive at dupagefoundation.org/legacy.

Foundation Staff

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



David M. McGowan, CFRE
President & CEO
Lisle



Kaitlyn M. Balsewicz, CFRE
Assistant Director of
Donor Services
Winfield



Maureen E. Brink
Administrative Assistant
Aurora



Yusra Javed Chaudhry
Graphic Designer
Oak Brook



Laura R. Ernst
Program Officer
Downers Grove



Samantha K. Hollis
Communications Associate
Aurora



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



Barbara S. Szczepaniak
Vice President for Programs
Elmhurst



Deborah L. Venezia
Director of Arts DuPage
Naperville



Karen L. Vicary
Office Manager
Elmhurst



Yashica Weeks, MS, CFRE
Director of Gift Planning
Aurora



David A. Weisz
Vice President for Finance
Carol Stream



Matt S. Wilson
Finance Officer
Lombard

“

You and your staff do us all proud.”

- The late Charlie Thurston, DuPage Foundation Founding Advisory Board Member

DuPage Foundation **DF**

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

Electronic Service Requested

Please contact our office if you have corrections to your address information.



NONPROFIT
U.S. POSTAGE
PAID
DOWNERS GROVE, IL
PERMIT NO. 762

Vision:

To raise the quality of life throughout DuPage County.

Mission:

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