

# MAPPING OUR IMPACT

FY23 ANNUAL REPORT

# Letter From the Board Chair & CEO

Dear Friends:

As we map our course of continuing to build powerful collaborations, helping area donors realize their charitable passions, and delivering coordinated impact to where it's needed most, we are delighted to share some highlights that have made this past fiscal year special.

We begin with a heartfelt thanks to Dave McGowan, our former president & CEO, who retired on December 31, 2022, after completing 25 years of distinguished service. We owe much of our growth to Dave's leadership and dedication in working with our staff and volunteer leaders to attract partners, foster collaborations, and embed stewardship as a hallmark of our culture.

Having completed a smooth leadership transition following the conclusion of a robust national search, our fiscal year ending June 30, 2023, proved to be another banner one for impact. Overall grantmaking nearly doubled to \$12.6 million from the past fiscal year, thanks in strong part to your generous support, which provided \$11.8 million in new gifts, and the start of grantmaking from the *DuPage Community Transformation Partnership* (DCTP)—a five-year, \$10 million grant program launched in 2022 with the DuPage County Board. The DCTP awarded its first rounds of Immediate Intervention and Transformational grants, totaling nearly \$5 million to support social service not-for-profits helping DuPage residents in the areas of food insecurity, housing instability, mental health, and substance use disorder.

Our *Community Needs Grant Program* (CNGP) also awarded 88 grants totaling a record nearly \$1.4 million to area not-for-profits, thanks to the help of our donors and donor-advised fund representatives, who recommended more than \$560,000 in supplemental funding.

Our *Bright & Early DuPage Initiative* also awarded more than \$275,000 to six local early childhood education collaboratives to help ensure our area children are poised to succeed in kindergarten and go on to lead successful lives.

We also expanded our family of funds to nearly 400, while bringing our total assets under management to \$136.6 million.

And lastly, we were honored to welcome 10 new members to our Legacy Society, which consists of known commitments from nearly 200 individuals and families. These generous friends have named the Foundation in their estate plans to secure our community's future and support their favorite causes and charities.

We invite you to explore the pages that follow to learn more about our activities, impact, and the spirit of generosity that continues to inspire us all.

Thank you for being an integral part of the DuPage Foundation family. We remain profoundly grateful for your confidence, trust, and partnership in achieving our vision. Together, we'll keep **doing a world of good in our own backyard.**<sup>®</sup>

TOTAL ASSETS  
**\$136.6 Million**  
(6.30.2023)

TOTAL GRANTS  
**\$12.6 Million**  
(FY23)



  
**Nathaniel P. Wasson**  
Chair, Board of Trustees



  
**Mike Sitrick, JD, CFRE**  
President & CEO



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*A sculpture from the Human+Nature exhibit by Daniel Popper displayed at The Morton Arboretum.*





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Special thanks to retiring Trustees Delrose A. Koch and Charles B. McKenna.

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Members who served July 1, 2022 - June 30, 2023

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Ralph Smykal\*  
Charlie A. Thurston\*  
Mary Eleanor Wall\*  
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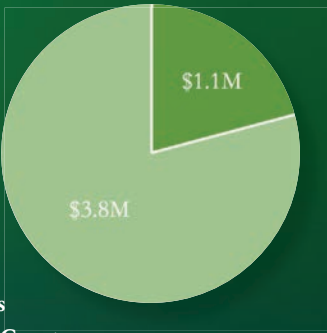
\* Remembered

# DuPage Community Transformation Partnership

The DuPage Community Transformation Partnership (DCTP) is a five-year, \$10 million grant program between DuPage County and DuPage Foundation funded with federal dollars received by the County through the American Rescue Plan Act (ARPA). It provides Immediate Intervention and Transformational grants to social service not-for-profit organizations helping DuPage County residents in the areas of food insecurity, housing instability, mental health, and substance use disorder.

Since the DCTP's launch in 2022, its impact has been profound. As of June 30, 2023, \$4,951,609 million has been awarded. This past spring, the DCTP also earned a national achievement award from the National Association of Counties (NACo) for its innovative collaboration.

## Total FY23 DCTP Grants: \$4,951,609



- Transformational Grants
- Immediate Intervention Grants

Awarded 18 Immediate Intervention grants totaling \$1.1 million.

Awarded 17 two-year Transformational grants totaling \$3.8 million.  
*(\$2 million distributed and \$1.8 million committed, which will be paid in the fall of 2023.)*

## Immediate Intervention Grants (Round 1): \$1,102,235

<b>Food Insecurity Grants</b>	<b>\$</b>	<b>280,000</b>	<b>Mental Health &amp; Substance Use Disorder Grants</b>	<b>\$</b>	<b>553,535</b>
Elmhurst-Yorkfield Food Pantry		20,000	Catholic Charities, Diocese of Joliet		60,000
Hamdard Health Alliance		20,000	DuPage Health Coalition		50,000
HCS Family Services		20,000	Easterseals DuPage & Fox Valley		60,000
Northern Illinois Food Bank		100,000	Gateway Foundation		74,135
People's Resource Center		60,000	Metropolitan Family Services DuPage		75,000
West Suburban Community Pantry		60,000	Northeast DuPage Family and Youth Services		81,500
<b>Housing Instability Grants</b>	<b>\$</b>	<b>268,700</b>	SamaraCare		60,000
Catholic Charities, Diocese of Joliet		163,700	Senior Home Sharing, Inc.		42,900
DuPagePads		80,000	The Community House		50,000
Metropolitan Family Services DuPage		25,000			

## DCTP Round 1 Immediate Intervention Grants Impact

Food Insecurity			Housing Instability			Mental Health and Substance Use Disorder		
Individuals Served	Households Served	Pounds of Food Distributed	Individuals Served	Households Served	Individuals Who Secured Housing	Individuals Served	Households Served	Counseling Sessions
<b>182,527</b>	<b>51,157</b>	<b>2,105,405</b>	<b>809</b>	<b>447</b>	<b>246</b>	<b>7,036</b>	<b>2,993</b>	<b>2,804</b>

## Transformational Grants (Round 1): \$3,849,374

Access Community Health Network	\$	300,000	SamaraCare		302,704
B.R. Ryall YMCA		253,000	Senior Home Sharing, Inc.		100,000
Bridge Communities, Inc.		200,400	Teen Parent Connection		257,500
Glen Ellyn Children's Resource Center		100,000	The Community House		250,000
Healthcare Alternative Systems, Inc.		350,000	Tri-Town YMCA		335,000
KidsMatter		200,000	Wayne Township Pantry & Senior Services, NFP		25,500
Mercy Housing Lakefront		82,710	West Suburban Community Pantry		235,620
Northeast DuPage Family and Youth Services		500,000	World Relief Chicagoland		270,000
Ray Graham Association		86,940			



## DuPage Community Transformation Partnership Grantee Profile: KidsMatter

Naperville's KidsMatter has been quietly transforming the lives of thousands of young people since 2001. A driving force in nurturing the well-being and resilience of youth, the agency focuses on fostering child and adolescent mental health, bullying prevention, substance abuse awareness, career exploration, and academic support. Its work has had a profound impact on kids, families, and our community.



*KidsMatter CEO & Executive Director Nina Menis (far left) and Director of Programs Sherilyn Hebe (far right) with members of KidsMatter's Senior High Board.*

Created by Edward Hospital as a community-wide prevention health strategy, KidsMatter (formerly known as the Naperville Youth Development Coalition) has, at the core of its mission, a commitment to empowering children and teenagers with the skills and resources they need to navigate the complexities of today's world. Through a range of innovative programs, KidsMatter addresses critical issues that affect youth, fostering a culture of kindness, empathy, and self-awareness, while helping them find their passions and purpose in life.

"We are focused on the healthy development of all young people, regardless of race, ethnicity, or economic background," said Nina Menis, KidsMatter's CEO & executive director. "We are grateful for our partners in the Naperville area and in DuPage and Will Counties who have rallied with us, recognizing the importance of investing in the well-being of our youth."

One of KidsMatter's initiatives, "Youth Mental Health First Aid," is a groundbreaking program, developed by the National Council of Mental Wellbeing, that equips educators, parents, and caregivers to recognize early signs of mental health challenges in young people. By providing crucial support and intervention, this program has been a lifeline for those grappling with anxiety, depression, or other mental health issues. Additional support has been provided by Linden Oaks Behavioral Health and other key partners.

**"We are focused on the healthy development of all young people, regardless of race, ethnicity, or economic background."**

– Nina Menis, KidsMatter, CEO & executive director

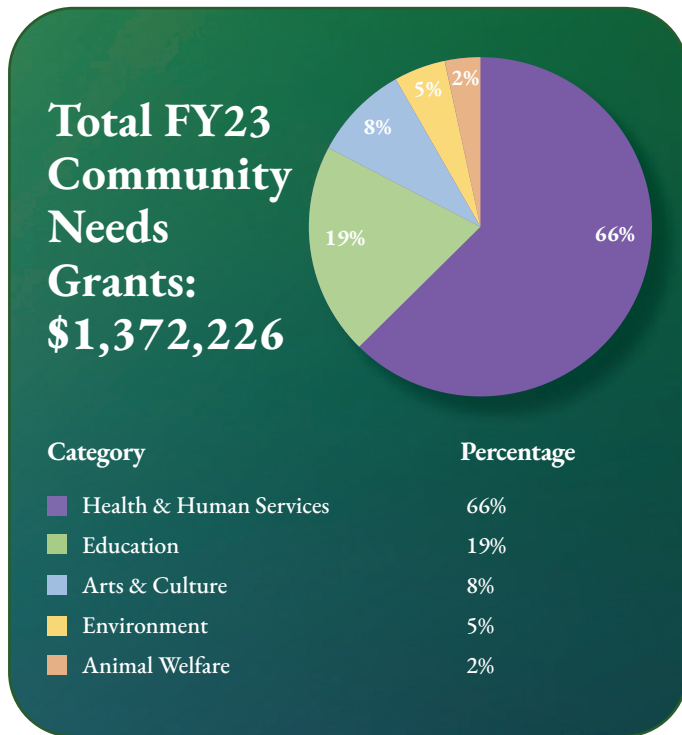
KidsMatter is a testament to the power of collective action and its impact on an entire community. Ensuring children grow into resilient, compassionate, and responsible adults is an investment in a bright future for generations to come.

*Funding from the DuPage Community Transformation Partnership (DCTP) helped KidsMatter support the expansion of its Youth Mental Health First Aid Training for parents and youth.*

To learn more, please visit [kidsmatter2us.org](https://kidsmatter2us.org).

# Community Needs Grant Program

Our *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.



- 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
- Fund for Persons With Disabilities
- Douglas A. Schooley Memorial Fund
- Sindelar Family Fund
- Donald and Dianne Skeet Fund
- Tellabs Foundation Fund

121 not-for-profits applied for *Community Needs* grants in FY23 with requests of more than \$2 million. By combining *Community Needs* funding with donor gifts and donor-advised fund grant recommendations, the Foundation funded 88 grants for a total of \$1,372,226 in impact.\*

Income from the following unrestricted and field-of-interest funds are used to fuel the *Community Needs* grant budget.

## 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

## Spring 2023 Health and Human Services Grants (51):

**\$ 899,076**

360 Youth Services	25,000
Assistance League of Chicagoland West	12,000
Bridge Communities, Inc.	25,000
Catholic Charities, Diocese of Joliet	20,000
Center for Advancing Domestic Peace	2,500
Chicago Dental Society Foundation	21,000
DayOne PACT	23,500
Donka, Inc.	15,000
DuPage Habitat for Humanity	5,000
DuPage Health Coalition	25,000
DuPagePads	25,000
Easterseals DuPage & Fox Valley	20,000
Elmhurst Walk-In Assistance Network	1,500
Evangelical Child & Family Agency	10,000
Family Focus	20,000
Friends for Therapeutic Equine Activities	23,000
Glen Ellyn Food Pantry	7,076
Glen Ellyn Youth & Family Counseling Service	25,000
Hamdard Health Alliance	25,000
Healthcare Alternative Systems, Inc.	25,000

\*See p.10 for a listing of donors and donor-advised funds that helped fund our FY23 *Community Needs* Grants.



Little Friends, Inc.	10,000
Loaves & Fishes Community Services	25,000
LOVE Christian Clearinghouse	12,000
Mayslake Village	2,500
Metropolitan Asian Family Services	15,000
Metropolitan Family Services DuPage	10,000
My Child's Life Matters	2,500
NAMI DuPage	25,000
Naperville Elderly Homes	15,000
Neighborhood Food Pantries	25,000
Northeast DuPage Family and Youth Services	25,000
Northern Illinois Food Bank	25,000
People's Resource Center	20,000
Ray Graham Association	23,000
Repeat Boutique Center	25,000
Ride Assist Naperville	5,000
Serenity House Counseling Services	25,000
Sharing Connections	25,000
Special Kids Day	6,000
Spectrios Institute for Low Vision	12,000
Teen Parent Connection	20,000
The Community House	25,000
The Garden Works Project	18,000
The Outreach House	25,000
Warm Coats for Cool Kids	18,000
WeGo Together for Kids	11,000
West Suburban Community Pantry	13,500
World Relief Chicagoland	25,000
Xilin Association	10,000
Youth Outlook	20,000
YWCA Metropolitan Chicago	25,000

**Fall 2022 Education Grants (16): \$ 256,750**

Alive Center	20,000
B.R. Ryall YMCA	25,000
Best Buddies	10,000
Career & Networking Center	23,000
Child's Voice	2,500
Compudopt	5,000
Doodlebug Workshop	5,000
DuPage Children's Museum	18,000
Exodus World Service	19,000
Glen Ellyn Children's Resource Center	25,000
H.O.M.E. DuPage, Inc.	25,000
Innovation DuPage	15,000
Inside Out Club DuPage	12,500
KidsMatter	14,250
Literacy DuPage	22,000
Your Children's Bookshelf	15,500

**Fall 2022 Arts & Culture Grants (15): \$ 114,500**

b.unity	7,500
Buffalo Theatre Ensemble	20,000
Chicago Sinfonietta	5,000
College of DuPage Foundation	25,000
Covenant Living at Windsor Park	5,000
DuPage County Historical Museum Foundation	2,500
Elmhurst Art Museum	20,000
ESSE Adult Day Services	5,000
Glen Ellyn-Wheaton Chorale	2,000
Lizzadro Museum of Lapidary Art	2,500
Naperville Heritage Society/Naper Settlement	5,000
Opera for the Young	2,500
Salt Creek Ballet	5,000
Spirito!	5,000
Young Naperville Singers	2,500

**Fall 2022 Environment Grants (4): \$ 69,200**

The Conservation Foundation	25,000
SCARCE	25,000
Partnership for Educational Progress	9,200
Village of Glen Ellyn	10,000

**Fall 2022 Animal Welfare Grants (2): \$ 32,700**

Fetching Tails Foundation	9,700
Hinsdale Humane Society	23,000

Visit [dupagefoundation.org/CNGP](https://dupagefoundation.org/CNGP) for grantee program descriptions.



The Community House

## Donors Making a Difference

The power of coordinated impact is evident through the growing support of our donor-advised fund representatives and local donors. Their partnership is helping us fuel positive change by addressing requests from DuPage County not-for-profits through our *Community Needs Grant Program*.

“The impact our donor-advised fund representatives and local donors are making is inspiring when you look at the numbers,” said Barb Szczepaniak, Foundation vice president for programs. “During FY23, we awarded 88 grants totaling nearly \$1.4 million. Donors and donor-advisors provided more than \$560,000 of that to support *Community Needs* grants, which boosted our grant budget and enabled us to fund many more requests. The needs continue to escalate in our community, and without this additional support, many worthy programs would not have been funded. I appreciate every single donor and donor-advisor who invested in this process and helped make these grants possible to support the growing needs in DuPage.”

Thanks to them, we were able to fund 66% of the dollar amounts requested through our *Community Needs Grants Program* in FY23. Without their support, only 39% would have been funded.

The generosity and vision of these and other partners who invest in our impact help make our community more equitable, compassionate, and enlightened, and their actions inspire others to follow in their footsteps, perpetuating a cycle of positive change for everyone.

To learn more about how you can help address our community’s greatest challenges and opportunities, contact us at **630.665.5556**.

**Our sincere thanks to the donors and donor-advised fund representatives who recommended grants totaling \$562,576 during FY23 to support *Community Needs*:**

### Donor-Advised Funds:

Anonymous Fund  
Phil and Judy Barnett Family Fund  
Betty M. Bock Fund  
Linda and Clark G. Carpenter Fund  
Edward & Minnie Ceragioli Fund  
Donor Advised Fund for Needy Children  
Harbaugh Family Fund  
The Hillcrest Fund  
History DuPage Fund

JCS Arts, Health and Education Fund  
Martha J. Johnson Fund  
Pane e Pesci Fund  
Paula K. Partipilo Fund  
Perma-Seal Fund  
Robinwood Legacy Fund  
Snodgrass Family Fund  
Summer Oaks Fund

### Pass-Through Gifts from:

Andrew C. Langert Family Foundation  
Joan Morrissey  
The McWethy Foundation

Molex  
Betty W. Smykal

Visit [dupagefoundation.org/CNGP](https://dupagefoundation.org/CNGP) for grantee program descriptions.



Evangelical Child and Family Agency



West Suburban Community Pantry



Sharing Connections



## Community Needs

# Grantee Profile: H.O.M.E. DuPage

The tranquility of the DuPage County suburbs is a contrast to the challenges of financial sustainability that face so many residents. H.O.M.E. DuPage, Inc. (H.O.M.E.), an acronym encompassing services offered—Home. Ownership. Money. Education.—and the only HUD-approved housing counseling agency in DuPage County, offers an array of services:

### Pre-Purchase Program

First time home buyers in DuPage County work with H.O.M.E. housing counselors to learn the process of home buying and the most efficient way to purchase for their own situation. Through educational workshops and one-on-one counseling, clients receive the tools to make the home buying process seamless and set themselves up for long term financial sustainability.

### Preserving Homeownership Program

Foreclosure – H.O.M.E. has a unique partnership with the 18<sup>th</sup> Judicial Circuit Court in DuPage County. Counselor in the Court is a program that places a housing counselor in foreclosure court four to five days per week, meeting with those facing foreclosure. Although proceedings are virtual, H.O.M.E. counselors are provided with a virtual break-out room to confer with clients.

### Financial Literacy Program

Partial funding from DuPage Foundation’s *Community Needs Grant Program* allows H.O.M.E. to provide a year-round financial literacy workshop and individual coaching sessions designed to empower individuals and families in achieving self-sufficiency and financial stability. This is for clients of H.O.M.E. and clients from 26 not-for-profit partners throughout DuPage County.

*This grant was funded by a pass-through gift from Betty W. Smykal.*

To learn more, please visit [homedupage.org](http://homedupage.org).



*Amber, right, with her real estate attorney at her closing, worked with a H.O.M.E. DuPage financial fitness coach on budgeting, credit, and life choices to achieve her dream of home ownership.*



*Anne O'Dell, H.O.M.E. DuPage executive director*

**“H.O.M.E. is vital in keeping the communities of DuPage County alive. Our dedicated team works with families on a daily basis to help them achieve their dream, whatever their dream may be.”**

– Anne O’Dell, H.O.M.E. DuPage executive director

## Welcome New Fund Partners

We are grateful to our donors and agency partners for their confidence and trust in our stewardship. It is a pleasure to support you in achieving your goals, locally and beyond, while working together to raise the quality of life for our community, today and for future generations.



### NEW FUNDS ESTABLISHED: 16

#### Agency Endowment & Designated Funds

- Community Needs Pass-Through Fund
- John and Pamela Dalby Fund
- Fiene Family Designated Fund
- Glenbard West Centennial Foundation Fund
- WDSRA Scholarship Endowment Fund

#### Donor-Advised Funds

- Anonymous (2)
- DiDomenico-Oberle Fund
- Faithful Family Fund
- Willis M. Gillett Family Fund
- His Hessed Fund
- The Hillcrest Fund
- Pane e Pesci Fund
- Jeffrey and Susan Williams Family Fund

#### Field-of-Interest Fund

- Anonymous (1)

#### Scholarship Fund

- Glenbard West Centennial Scholarship Fund

### Remember Us in Your Estate Plan

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

“I hereby give and bequeath \$\_\_\_\_\_ or \_\_\_% 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 or trust. Insurance proceeds or IRA assets will be disposed of by the terms of the insurance policy or IRA document.



## Creating a Lasting Legacy

**D**uPage Foundation's Legacy Society honors our generous and forward-thinking donors who have included the Foundation in their estate plans. To ensure your legacy will have a transformational impact on our community and your favorite causes for generations to come, you can name DuPage Foundation as a beneficiary in your estate plan. We sincerely thank our partners, those listed below, and those who remain anonymous, for their generosity and commitment to securing our community's future. To learn how you can become a member of this special circle of Foundation friends, call us at **630.665.5556**.



Members as of June 30, 2023:

Anonymous (101)

Gary R. and Margaret A. Babbitt  
 Phillip L. and Judith E. Barnett  
 Howard C.\* and Shirley\* Benson  
 Herbert J. Bock\*  
 Ronald R. Bork\*  
 Jerry C.\* and Betty J.\* Bradshaw  
 Nancy E. Bruss\*  
 John J. Bryant\*  
 Stephen M. and Emily L. Burt  
 Cleve E. Carney\*  
 Linda S. Carpenter  
 Susanne S. Cassell\*  
 Ruth\* and Hugh\* Christ  
 Edward S. and Shirley J. Crawford  
 RC and Lorraine Crompton  
 Donald T. Dennerlein  
 James E.\* and Marie A. Drasal  
 Lloyd E.\* and Mary C.\* Eckerson  
 Burton E.\* and Patricia A. Ericson  
 Douglas G. and Martha R. Eyles  
 Jack W. and Joan E. Fiene  
 Diane V. Fox\*  
 Vincent J. and Susan L. Furman  
 James Gates\*  
 Richard E. and Elizabeth W. Geyer  
 Leonard J.\* and Barbara A. Giblin  
 Carrie A. and Robert G. Gibson  
 George N. Gilkerson Jr.  
 Willis M. Gillett\*  
 Howard G. Goldstein and Peggy A. McGrath  
 James W. Hebert  
 Jane Henderson\*

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

Albert A.\* and Mimi Rose  
 Michael J. and Mary T. Schroeck  
 Thomas R. Scott  
 F. Ronald and Carol L. Seager  
 Steve E. and Megan M. Shebik  
 Nancy E. Sindelar\*  
 Michael R. and Elizabeth E. Sitrick  
 Dianne M. Skeet\*  
 James M. and Ruth Ann Snodgrass  
 John W. Squire\*  
 David A. Stelzner and Nicki J. Krafft  
 Lenora J. Su, M.D.  
 Darlene R. Swartz  
 Charlie A. Thurston\*  
 Mark M. and Barbara L. Turner  
 Theodore M. Utchen\*  
 Mary L. Voigt\*  
 Mary Eleanor\* and James M.\* Wall  
 Michael and Deborah A. Welgat  
 Donald\* and Dorothy B.\* White  
 Les A. and Mary E. Wiberg  
 Carson R. and Dawn C. Yeager

*\*Remembered*

### NEW LEGACY SOCIETY MEMBERS: 10

- Anonymous (6)
- Jack W. Fiene and Joan E. Fiene
- Frank C. and Carolyn Hudetz
- William D. Latura and Deborah S. Hartman
- Darlene R. Swartz

## Mapping the Future

# The Kuhn Family: Doing Little Things with Big Impact



Mary and Dick Kuhn (center) with their children (from left), Connor, Evan, McKenzie, and Kaelin.

**F**ifth-generation DuPage County residents Dick and Mary Kuhn are passionate about giving back. “It’s simple,” said Dick. “We have been blessed, and we have a responsibility to share those blessings.”

While some choose to give during their lives, and others prefer legacy gifts, the Kuhns take a hybrid approach. They give what they can now and, as DuPage Foundation Legacy Society members, have also pledged to support DuPage County’s future needs.

The Kuhns utilize a Foundation donor-advised fund (DAF) for some of their current giving, much of which supports food insecurity and vulnerable veterans. A DAF is the perfect vehicle for their children, Connor, Evan, Kaelin, and McKenzie, to give collaboratively in the future.

Meanwhile, the Kuhns’ youngest child, McKenzie, is jumping right into her parents’ philanthropic footsteps. McKenzie serves as vice chair of the Foundation’s Next Generation Initiative (NGI). With McKenzie’s leadership, NGI will continue to empower DuPage County’s next cohort of philanthropists while highlighting the impactful work of various local not-for-profits.

As attorneys at Kuhn, Heap & Monson in Naperville, both Dick and McKenzie have connected countless clients with charitable intentions to DuPage Foundation. “It’s an easy referral,” said Dick. “The Foundation’s professional, local, and generous staff members seamlessly educate our clients on the best, and most tax-effective ways to accomplish their charitable goals.”

A self-described homebody with a passion for his heritage, Dick now credits his law firm’s thousands of supportive clients, family, and friends with his reasons for staying put. Those around him agree. “I’m excited to raise my family in a community that has great schools, fun places, and restaurants to explore, with a small-town, Midwestern feel and the city nearby,” said McKenzie. “I feel blessed to live in DuPage County, a community supported by numerous not-for-profits who continue to amaze me with their impact.”

**“We strive to make the community a little bit better. That’s something anyone can do.”**

– McKenzie Kuhn



## Ways to Give

DuPage Foundation offers a variety of powerful, tax-effective ways to give back to our community and support your favorite causes and charities, locally and beyond, while enjoying maximum flexibility and personalized service. You 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

When given directly, you may deduct the 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 for a charitable deduction and to avoid capital gains tax on the appreciation.

### Life Insurance

The simplest way to give life insurance is to designate the Foundation as a policy beneficiary. You can also transfer ownership, 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.

### Retirement Plans and Qualified Charitable Distributions (QCDs)

To lower their current or future Adjusted Gross Income, donors can make direct gifts from a retirement plan. Donors 70 ½ and older can also make tax-free, Qualified Charitable Distributions (QCDs) of up to \$100,000 per individual or \$200,000 per married couple for 2023, from traditional IRAs only. For Donors 73 and older, QCDs count toward their Required Minimum Distributions (RMDs). Distributions to any Foundation fund, except donor-advised funds, will qualify.

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

Contributions of privately-held business interests may receive a charitable deduction for the full fair market value of the donated assets and avoid capital gains tax on their appreciation. Consult your advisor to ensure all requirements and rules are followed.

### Transfer from an Existing Private Foundation

Administering a private foundation under IRS rules can be burdensome and expensive. Transferring assets into a donor-advised fund at DuPage Foundation may provide a simpler, more cost-effective alternative. Partial transfers can facilitate grant anonymity, provide support in the identification and vetting of charitable opportunities, and provide 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. Payment size will depend on age; as will the portion that is tax-free. The gift portion of the annuity will be tax deductible.

### Charitable Lead Trusts

These 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 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, or explore the types of funds these gifts can support?**

Call us at **630.665.5556** to learn more.

## Making a Difference

# Marty & Dave Scatterday: Passionate About Philanthropy



Marty & Dave Scatterday

**M**arty and Dave Scatterday both grew up in Glen Ellyn, with parents who were involved in the community. But it wasn't until they were raising their own children that they recognized the extent of need within DuPage County. The Scatterdays' awareness grew through their involvement with Bridge Communities, First Presbyterian and First Methodist churches of Glen Ellyn, the Glen Ellyn Food Pantry, Kiwanis, and other organizations.

**“If we can do this, I would love for others to see that they might also be able to do it.”**

– Marty Scatterday

Although transitioning into retirement now, Dave enjoyed 30 years as a financial advisor with Edward Jones in downtown Glen Ellyn. Early in his career, Dave met Dave McGowan, DuPage Foundation's past president & CEO, who helped him better understand both the mechanics and the passion that drives philanthropy. For the next 25 years, Dave listened carefully in order to learn what was most important to his clients. If they expressed a sentiment for charitable giving, Dave would refer those clients to DuPage Foundation for more information.

“In philanthropy, I believe what's in your heart will guide you,” said Dave. “My work has always been to help clients understand this and grasp that opportunity.”

Grateful for what the community has provided to them over the years, the Scatterdays find that giving back comes easily. “What our local not-for-profits are accomplishing, we can't help but support,” said the Scatterdays.

In true ‘walking the walk’ fashion, the Scatterdays opened their own donor-advised fund (DAF) with the Foundation in 2021. In addition to the tax advantages a DAF allows, this charitable giving vehicle supports what is in the hearts of the Scatterdays today, including housing, food, and self-sufficiency, as well as other interests that may develop in the future.

“It's a gift that we get to see our philanthropy at work now,” said Marty. “And we are confident that DuPage Foundation's excellent staff will continue to support our passions with this fund moving forward.”



# The Power of Parent Advocates

Celebrating a decade of building sustainable early childhood systems throughout DuPage County, *Bright & Early DuPage* (B&ED) has provided seed funding to establish six collaborative networks and ongoing support for eight. All are positively impacting the lives of countless birth to five students and their families.

During FY23, grants were awarded to six local early childhood collaboratives. They all share resources to promote the development of young children, with the ultimate goal of preparing them to be successful in school. Additionally, the new Villa Park/Lombard Collaborative was established.

“Our mission is to increase access to quality education and support the healthy development of children,” said Deborah du Vair, current consultant for the program. “Our investment to add six Parent Advocates and establish our Parent Advocate Workshops has been a game-changer. We have an extremely talented group from diverse backgrounds doing outreach and engaging with families in their communities.”



*Deborah du Vair, Bright & Early DuPage Consultant*

du Vair is responsible for establishing the series of workshops designed to provide professional training. Topics cover everything from an overview of benefits and screening tools, data analysis, and outreach, to mental health, and self-care. “Ideas are shared using their collective experiences,” said du Vair. “Seeing the power of our team members working together to find solutions has been so impactful to

the children we serve. Their energy and dedication reached several thousand DuPage families just this past summer alone.”

B&ED isn’t just a program, it’s a promise that every child, regardless of circumstances, deserves a bright and early start in life. In DuPage County, this promise is being kept, one child at a time.



*Left to right: Tom Jackson and Claudia Garcia, School District 45; Sarah O'Donnell, Tri-Town YMCA; Deborah du Vair, B&ED; and Patricia Ibarra, Tri-Town YMCA.*

Quality early childhood programs can yield a \$4 to \$9 return per \$1 invested, according to the National Forum on Early Childhood Policy and Programs.

## B&ED Collaborative Networks

The following early childhood collaborations currently receive funding through the B&ED Initiative:

- Addison Partners for Play, Learning, & Education (APPLE)
- Bensenville Early Learning Supporters
- Birth to Five Community Coalition
- Glenbard Early Childhood Collaborative
- Villa Park Area Early Childhood Collaborative
- WeGo Together for Kids
- Wheaton/Warrenville Early Childhood Collaborative
- Willowbrook Corner Coalition

Learn more at [dupagefoundation.org/BrightAndEarly](https://dupagefoundation.org/BrightAndEarly).

# Advocating for the Arts in DuPage County

**A**rts DuPage works continuously to weave cultural activities and other forms of creative expression into the fabric of our community. As our area’s champion for the arts, Arts DuPage collaborates with artists and arts leaders, local businesses, elected officials, and residents to support, promote, and advocate for the arts throughout DuPage County.



A DuPage Foundation Initiative

## Arts DuPage FY23 Highlights



Hosted a group of arts enthusiasts for an after-hours private tour of the “Andy Warhol Portfolios: A Life In Pop | Works from the Bank of America Collection” exhibit at the Cleve Carney Museum of Art in the McAninch Arts Center at College of DuPage led by DuPage Foundation Trustee and MAC Director Diana Martinez. The exhibit, sponsored by DuPage Foundation and Arts DuPage, was a multi-faceted experience encompassing 11,000 square feet and featuring 94 works and original photographs by Warhol.



Provided free promotion for 1,632 arts events from 247 arts organizations on artsdupage.org, an online arts and entertainment site that highlights events, organizations, and artists, and interfaces with a broad target audience of arts lovers.



Acted as a Community Navigator in partnership with Arts Alliance Illinois to inform and encourage participation in the Department of Economic Opportunity’s Illinois Creative Recovery Grant for DuPage County art organizations, individual artists, and gig workers. As a result of multiple outreach efforts, more than 200 applications from the region were received.

To learn more about Arts DuPage and all things art in DuPage county, visit [artsdupage.org](https://artsdupage.org).

**112**  
Arts DuPage  
Members

**17,000+**  
Social Media  
Followers

**86,000+**  
ArtsDuPage.org  
Unique Visitors

**“Your efforts to elevate the arts have enriched our community and enhanced its cultural vitality. The arts have the power to inspire, educate, and unite people, and Arts DuPage, under your leadership, has played a pivotal role in harnessing this power for our community’s betterment.”**

– Julie Mars, Addison Center for the Arts



## Next Generation Initiative

The beauty of the *Next Generation Initiative* (NGI) is that, as its name implies, it engages and empowers our county’s next generation of philanthropic leaders and volunteers.

As a giving circle, NGI members and friends are focused on learning about local needs, supporting not-for-profits addressing those needs, and meeting other community members who are committed to giving back.

For FY23, NGI selected three areas of interest for its focus:

### Veterans and Housing:

September 2022 – Midwest Shelter for Homeless Veterans  
(Grant Awarded: \$8,000)

### Mental Health:

April 2023 – Alive Center  
(Grant Awarded: \$6,000)

### Early Childhood:

June 2023 – The Outreach House’s First Things First Program  
(Grant Awarded: \$5,000)

At NGI’s sixth annual Charity Trivia Night in February 2023, 175 attendees representing 34 teams competed to win the Charity Trivia trophy and the opportunity to recommend a grant to their favorite DuPage not-for-profit. The winning team, Pillars of the Earth, recommended a \$2,000 grant to North Central College’s Center for Financial Literacy.

## Next Generation Initiative

DuPage Foundation



*NGI Steering Committee Vice Chair Henry Kaskov; Chair Karen Fleming; and DuPage Foundation Assistant Director of Donor Services Kaitlyn Miller Balsewicz.*



*Members of the 2023 NGI Steering Committee and friends.*

### Memberships

61 individuals and families joined in calendar year 2022, and 62 individuals and families have joined in 2023 as of October 1, 2023.

### NGI Endowment

Raised nearly \$50,000 in sponsorships, membership dues, and gifts to defray the cost of NGI events, make grants, and build NGI’s permanent grantmaking endowment.

2022 and 2023  
Silver Corporate  
Sponsor



2022 Bronze  
Corporate Sponsor

**FORV/S**

Since its inception, NGI has granted nearly \$150,000 to local not-for-profit organizations. Learn more at [dupagefoundation.org/NGI](https://dupagefoundation.org/NGI).

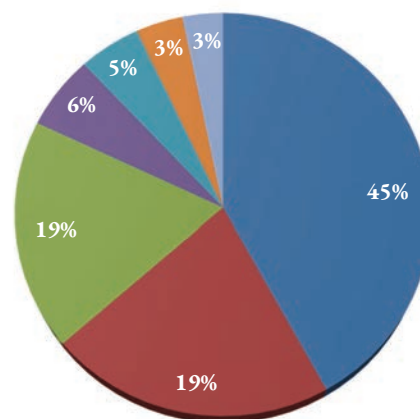
**“When my family moved to DuPage, I quickly got connected with the Next Generation Initiative. I began giving philanthropically to impactful area not-for-profits thanks to our connection with DuPage Foundation.”**

– Karen Fleming, FY23 NGI Steering Committee Chair

# Statement of Financial Position

<b>ASSETS</b>	<b>June 30, 2023</b>	<b>June 30, 2022</b>
Cash and Equivalents	\$ 4,001,815	\$ 4,025,448
Investments	131,080,757	123,170,805
Pledges Receivable	85,300	118,800
Charitable Lead Trust Receivable	119,234	112,074
Prepaid Expenses	62,428	91,660
Cash Value of Life Insurance	60,671	114,166
Property and Equipment	1,156,462	1,182,246
<b>Total Assets</b>	<b>\$136,566,667</b>	<b>\$128,815,199</b>
<b>LIABILITIES AND NET ASSETS</b>		
<b>Liabilities</b>		
Agency Funds	\$ 26,143,671	\$ 23,531,409
Annuity Payable	60,370	71,881
Accrued Expenses	296,824	285,280
Deferred Revenue	7,437,701	10,588,571
Grants Payable	150,000	-
<b>Total Liabilities</b>	<b>\$ 34,088,566</b>	<b>\$ 34,477,141</b>
<b>Net Assets</b>		
Without Donor Restrictions	\$ 17,811,445	\$ 14,502,998
With Donor Restrictions	84,666,656	79,835,060
<b>Total Net Assets</b>	<b>\$102,478,101</b>	<b>\$ 94,338,058</b>
<b>Total Liabilities and Net Assets</b>	<b>\$136,566,667</b>	<b>\$128,815,199</b>

- Donor-Advised **45%**
- Field-of-Interest **19%**
- Agency **19%**
- Unrestricted **6%**
- Operating **5%**
- Designated **3%**
- Scholarship **3%**

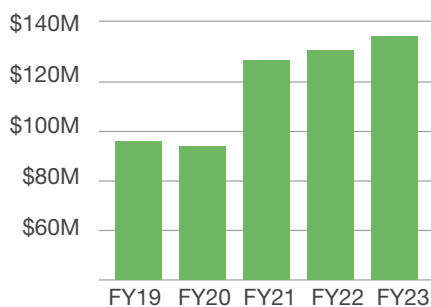




# Statement of Activities

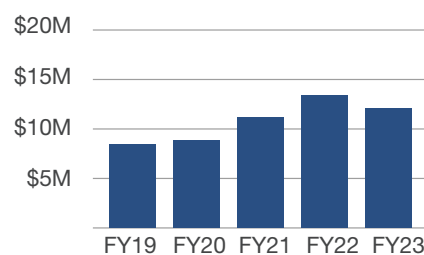
	<u>Without Donor Restrictions</u>	<u>With Donor Restrictions</u>	<u>Total FY 2023</u>	<u>FY 2022</u>
<b>Revenue</b>				
Gifts, Bequests, and Grants	\$ 963,284	\$ 10,879,200	\$ 11,842,484	\$ 13,269,143
Federal Grants	3,150,870	-	3,150,870	-
Net Investment Gains (Loss)	417,118	4,940,300	5,357,418	(15,170,510)
Investment Income	100,881	2,437,397	2,538,278	3,156,696
Fee Revenue	239,146	-	239,146	244,559
Net Assets Released from Restrictions	13,425,301	(13,425,301)	-	-
<b>Total Support and Revenue</b>	<b>\$ 18,296,600</b>	<b>\$ 4,831,596</b>	<b>\$ 23,128,196</b>	<b>\$ 1,499,888</b>
<b>Expenses</b>				
Grants Awarded	\$ 12,614,346	-	\$ 12,614,346	\$ 6,405,271
Grantmaking Activities	820,758	-	820,758	632,431
Management and General	658,734	-	658,734	589,936
Fundraising	894,315	-	894,315	648,275
<b>Total Expenses</b>	<b>\$ 14,988,153</b>	<b>-</b>	<b>\$ 14,988,153</b>	<b>\$ 8,275,913</b>
<b>Increase (Decrease) in Net Assets</b>	<b>\$ 3,308,447</b>	<b>\$ 4,831,596</b>	<b>\$ 8,140,043</b>	<b>\$ (6,776,025)</b>
<b>Net Assets - Beginning of Year</b>	<b>\$ 14,502,998</b>	<b>\$ 79,835,060</b>	<b>\$ 94,338,058</b>	<b>\$ 101,114,083</b>
<b>Net Assets - End of Year</b>	<b>\$ 17,811,445</b>	<b>\$84,666,656</b>	<b>\$102,478,101</b>	<b>\$ 94,338,058</b>

## Assets



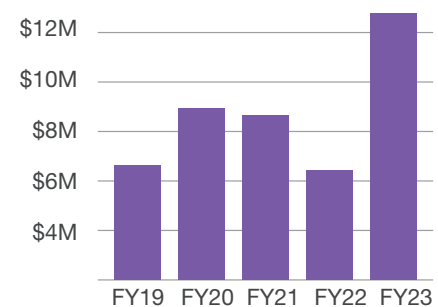
FY19	\$ 98,928,275
FY20	\$ 97,402,516
FY21	\$125,703,251
FY22	\$128,815,199
FY23	\$136,566,667

## Contributions



FY19	\$ 7,019,619
FY20	\$ 7,769,826
FY21	\$10,222,632
FY22	\$13,269,143
FY23	\$11,842,484

## Grants



FY19	\$ 6,756,791
FY20	\$ 8,814,664
FY21	\$ 8,658,723
FY22	\$ 6,405,271
FY23	\$12,614,346

The FY23 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](http://dupagefoundation.org/financials).

# Leadership Transition

## Dave McGowan Retires After 25 Years of Distinguished Service



*Dave McGowan surrounded by Foundation staff at his December 2022 retirement celebration.*

DuPage Foundation bade a fond farewell to its longtime chief staff officer, Dave McGowan, upon his retirement at the end of 2022, after 25 years of distinguished leadership.

When Dave started as executive director in 1998, Foundation assets totaled nearly \$4 million and its cumulative grants totaled nearly \$1 million. At the close of his career, assets exceeded \$130 million and cumulative grants totaled \$70 million—a combined \$200 million in total charitable capital.

Dave was named president in 2003 and CEO in 2015. In 2022, he was named “Humanitarian of the Year” by West Suburban Philanthropic Network.

He is missed by Foundation Trustees, staff, and friends, but his dedication and hard work carries on through the culture of leadership and service he helped build.

## Mike Sitrick Takes the Helm as President & CEO



*Mike Sitrick*

Charting our course to the future, Mike Sitrick was appointed president & CEO in January 2023. He was unanimously selected by the Board following the conclusion of a comprehensive national search.

Mike has held multiple roles at the Foundation dating back to 2003. He initially served as its first full-time development staff member before going on to study and practice law. Mike returned in 2013 to lead the Advancement Department, helping achieve a period of unprecedented growth and community impact for the Foundation.

Since starting in his new role, Mike has been focused on connecting with donors, not-for-profits, area businesses, and community leaders to rally them around opportunities to deliver targeted, coordinated impact, together, for the good of our community, while building the Foundation’s discretionary endowments.



# Foundation Staff

**D**uPage 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.



**Michael R. Sitrick,**  
**JD, CFRE**  
President & CEO  
*Lombard*



**Kaitlyn Miller Balsewicz,**  
**CFRE, CAP®**  
Assistant Director of Donor Services  
*Winfield*



**Maureen E. Brink**  
Administrative Assistant  
*Aurora*



**Robin Carroll**  
Director of Marketing &  
Communications  
*Western Springs*



**Yusra Javed Chaudhry**  
Graphic Designer  
*Oak Brook*



**Laura R. Ernst**  
Program Officer  
*Downers Grove*



**Samantha Hollis**  
Communications Associate  
*Aurora*



**Barbara S. Szczepaniak**  
Vice President for Programs  
*Elmhurst*



**Michael Trench**  
Vice President for Advancement  
*Willowbrook*



**Deborah L. Venezia**  
Director of Arts DuPage  
*Naperville*



**Karen L. Vicary**  
Office Manager  
*Elmhurst*



**Yashica Weeks,**  
**CFRE, CAP®**  
Director of Gift Planning  
*Aurora*



**David A. Weisz**  
Vice President for Finance  
*Carol Stream*



**Matt S. Wilson**  
Finance Officer  
*Lombard*

**“DuPage Foundation’s staff has the highest integrity and is always ready to help.”**

– Joan M. Vilim, CFA, Elmhurst University Associate Professor Emerita and DuPage Foundation Investment Committee Member



Doing a world of good in our own backyard®

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**Vision:**

To raise the quality of life throughout DuPage County.

**Mission:**

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