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.®

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.*
Leadership

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

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Welcome New FY24 Trustee

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Hinsdale
BP

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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Norm Beles
Bob Fernandez

**DuPage Foundation | FY23 Annual Report**

**Bylaws**
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Bob Fernandez

**DuPage Community Transformation Partnership**
Megan Shebik, Chair
Betsy Brosnan
Deb du Vair
Paula Deacon Garcia
Betsy Goltermann
Kendra Hyett
Mary Keating
Candace King
Greg Schwarze

**Grant**
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Betsy Goltermann, Vice Chair
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Paul LeFort
Gerald Lewis
Laurie McMahon
Laurie Reifel
Sahira Sadiq
Megan Shebik

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Ted Saul, Vice Chair
Dan Bukowski
John Culhane
Pat deRosset
Mike Havalas
Dan Maguire
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Kevin Phillips
Steve Shebik
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Gino Tomaro, Vice Chair
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Conor Gee
Robert Hutchinson
Paul Miles
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Jim Myers
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July 1, 2022 - June 30, 2023

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Norman J. Beles
Betty J. Bradshaw*
Jerry C. Bradshaw*
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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
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Richard W. Kuhn
Paul J. Lehman
Daniel Maguire
Brooks McCormick*
Charles B. McKenna
Laurie K. McMahon
Ernest J. Mrozek
Vincent A. Naccarato
Nancy E. Sindelar*
Ralph Smykal*
Charlie A. Thurston*
Mary Eleanor Wal*
Carson R. Yager

* Remembered

**Trustees Emeriti**
David P. Aldridge
Norman J. Beles
Betty J. Bradshaw*
Jerry C. Bradshaw*
Stephen M. Burt
Cleve E. Carney*
Carole J. Cline
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Ernest J. Mrozek
Vincent A. Naccarato
Nancy E. Sindelar*
Ralph Smykal*
Charlie A. Thurston*
Mary Eleanor Wal*
Carson R. Yager

* Remembered
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.

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

**Food Insecurity Grants**
- Elmhurst-Yorkfield Food Pantry: $280,000
- Hamard Health Alliance: 20,000
- HCS Family Services: 20,000
- Northern Illinois Food Bank: 100,000
- People’s Resource Center: 60,000
- West Suburban Community Pantry: 60,000

**Housing Instability Grants**
- Catholic Charities, Diocese of Joliet: $268,700
- DuPagePads: 163,700
- Metropolitan Family Services DuPage: 80,000
- Metropolitan Family Services DuPage: 25,000

### Mental Health & Substance Use Disorder Grants
- Catholic Charities, Diocese of Joliet: $53,535
- DuPage Health Coalition: 6,000
- Easterseals DuPage & Fox Valley: 6,000
- Gateway Foundation: 74,135
- Metropolitan Family Services DuPage: 75,000
- Northeast DuPage Family and Youth Services: 81,500
- SamaraCare: 60,000
- Senior Home Sharing, Inc.: 10,000
- The Community House: 50,000

### DCTP Round 1 Immediate Intervention Grants Impact

<table>
<thead>
<tr>
<th>Food Insecurity</th>
<th>Housing Instability</th>
<th>Mental Health and Substance Use Disorder</th>
</tr>
</thead>
<tbody>
<tr>
<td>Individuals Served</td>
<td>Households Served</td>
<td>Pounds of Food Distributed</td>
</tr>
<tr>
<td>182,527</td>
<td>51,157</td>
<td>2,105,405</td>
</tr>
<tr>
<td>7,036</td>
<td>2,993</td>
<td></td>
</tr>
</tbody>
</table>

### 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 | | |

Total FY23 DCTP Grants: $4,951,609
- Transformational Grants: $3.8M
- Immediate Intervention Grants: $1.1M
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.

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.”
– 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.

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.

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.
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

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.

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

### Total FY23 Community Needs Grants: $1,372,226

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health &amp; Human Services</td>
<td>66%</td>
</tr>
<tr>
<td>Education</td>
<td>19%</td>
</tr>
<tr>
<td>Arts &amp; Culture</td>
<td>8%</td>
</tr>
<tr>
<td>Environment</td>
<td>5%</td>
</tr>
<tr>
<td>Animal Welfare</td>
<td>2%</td>
</tr>
</tbody>
</table>

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.*

### Spring 2023 Health and Human Services Grants (51): $ 899,076

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

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

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 25,000
- 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 for grantee program descriptions.
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 for grantee program descriptions.
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 18th 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.

“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 Hesed 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

DuPage 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. Schroech
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. Welgate
Donald* and Dorothy B.* White
Les A. and Mary E. Wiberg
Carson R. and Dawn C. Yeager
*Remembered

NEW LEGACY SOCIETY MEMBERS:

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

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.

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

– Marty Scatterday

“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.”
Growing Our Initiatives

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.”

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.

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.
Growing Our Initiatives

**Advocating for the Arts in DuPage County**

*Arts 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.

**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.

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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
Growing Our Initiatives

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.

Since its inception, NGI has granted nearly $150,000 to local not-for-profit organizations. Learn more at 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

## ASSETS

<table>
<thead>
<tr>
<th>Description</th>
<th>June 30, 2023</th>
<th>June 30, 2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash and Equivalents</td>
<td>$4,001,815</td>
<td>$4,025,448</td>
</tr>
<tr>
<td>Investments</td>
<td>$131,080,757</td>
<td>$123,170,805</td>
</tr>
<tr>
<td>Pledges Receivable</td>
<td>$85,300</td>
<td>$118,800</td>
</tr>
<tr>
<td>Charitable Lead Trust Receivable</td>
<td>$119,234</td>
<td>$112,074</td>
</tr>
<tr>
<td>Prepaid Expenses</td>
<td>$62,428</td>
<td>$91,660</td>
</tr>
<tr>
<td>Cash Value of Life Insurance</td>
<td>$60,671</td>
<td>$114,166</td>
</tr>
<tr>
<td>Property and Equipment</td>
<td>$1,156,462</td>
<td>$1,182,246</td>
</tr>
<tr>
<td><strong>Total Assets</strong></td>
<td><strong>$136,566,667</strong></td>
<td><strong>$128,815,199</strong></td>
</tr>
</tbody>
</table>

## LIABILITIES AND NET ASSETS

### Liabilities

<table>
<thead>
<tr>
<th>Description</th>
<th>June 30, 2023</th>
<th>June 30, 2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agency Funds</td>
<td>$26,143,671</td>
<td>$23,531,409</td>
</tr>
<tr>
<td>Annuity Payable</td>
<td>$60,370</td>
<td>$71,881</td>
</tr>
<tr>
<td>Accrued Expenses</td>
<td>$296,824</td>
<td>$285,280</td>
</tr>
<tr>
<td>Deferred Revenue</td>
<td>$7,437,701</td>
<td>$10,588,571</td>
</tr>
<tr>
<td>Grants Payable</td>
<td>$150,000</td>
<td>$-</td>
</tr>
<tr>
<td><strong>Total Liabilities</strong></td>
<td><strong>$34,088,566</strong></td>
<td><strong>$34,477,141</strong></td>
</tr>
</tbody>
</table>

### Net Assets

<table>
<thead>
<tr>
<th>Description</th>
<th>June 30, 2023</th>
<th>June 30, 2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Without Donor Restrictions</td>
<td>$17,811,445</td>
<td>$14,502,998</td>
</tr>
<tr>
<td>With Donor Restrictions</td>
<td>$84,666,656</td>
<td>$79,835,060</td>
</tr>
<tr>
<td><strong>Total Net Assets</strong></td>
<td><strong>$102,478,101</strong></td>
<td><strong>$94,338,058</strong></td>
</tr>
</tbody>
</table>

**Total Liabilities and Net Assets**

<table>
<thead>
<tr>
<th>Description</th>
<th>June 30, 2023</th>
<th>June 30, 2022</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total Liabilities and Net Assets</strong></td>
<td><strong>$136,566,667</strong></td>
<td><strong>$128,815,199</strong></td>
</tr>
</tbody>
</table>

### Donor Activity

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

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"Calculating Our Activity"
Statement of Activities

Revenue

<table>
<thead>
<tr>
<th>Without Donor Restrictions</th>
<th>With Donor Restrictions</th>
<th>Total</th>
<th>FY 2023</th>
<th>FY 2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gifts, Bequests, and Grants</td>
<td>$ 963,284</td>
<td>$ 10,879,200</td>
<td>$ 11,842,484</td>
<td>$ 13,269,143</td>
</tr>
<tr>
<td>Federal Grants</td>
<td>3,150,870</td>
<td>-</td>
<td>3,150,870</td>
<td>-</td>
</tr>
<tr>
<td>Net Investment Gains (Loss)</td>
<td>417,118</td>
<td>4,940,300</td>
<td>5,357,418</td>
<td>(15,170,510)</td>
</tr>
<tr>
<td>Investment Income</td>
<td>100,881</td>
<td>2,437,397</td>
<td>2,538,278</td>
<td>3,156,696</td>
</tr>
<tr>
<td>Fee Revenue</td>
<td>239,146</td>
<td>-</td>
<td>239,146</td>
<td>244,559</td>
</tr>
<tr>
<td>Net Assets Released from Restrictions</td>
<td>13,425,301</td>
<td>(13,425,301)</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td><strong>Total Support and Revenue</strong></td>
<td>$ 18,296,600</td>
<td>$ 4,831,596</td>
<td>$ 23,128,196</td>
<td>$ 1,499,888</td>
</tr>
</tbody>
</table>

Expenses

<table>
<thead>
<tr>
<th>Without Donor Restrictions</th>
<th>With Donor Restrictions</th>
<th>Total</th>
<th>FY 2023</th>
<th>FY 2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grants Awarded</td>
<td>$ 12,614,346</td>
<td>-</td>
<td>$ 12,614,346</td>
<td>$ 6,405,271</td>
</tr>
<tr>
<td>Grantmaking Activities</td>
<td>820,758</td>
<td>-</td>
<td>820,758</td>
<td>632,431</td>
</tr>
<tr>
<td>Management and General</td>
<td>658,734</td>
<td>-</td>
<td>658,734</td>
<td>589,936</td>
</tr>
<tr>
<td>Fundraising</td>
<td>894,315</td>
<td>-</td>
<td>894,315</td>
<td>648,275</td>
</tr>
<tr>
<td><strong>Total Expenses</strong></td>
<td>$ 14,988,153</td>
<td>-</td>
<td>$ 14,988,153</td>
<td>$ 8,275,913</td>
</tr>
</tbody>
</table>

Increase (Decrease) in Net Assets

<table>
<thead>
<tr>
<th>Without Donor Restrictions</th>
<th>With Donor Restrictions</th>
<th>Total</th>
<th>FY 2023</th>
<th>FY 2022</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Assets Contributions</strong></td>
<td>$ 3,308,447</td>
<td>$ 4,831,596</td>
<td>$ 8,140,043</td>
<td>(6,776,025)</td>
</tr>
<tr>
<td><strong>Net Assets - End of Year</strong></td>
<td>$ 17,811,445</td>
<td>$84,666,656</td>
<td>$102,478,101</td>
<td>$94,338,058</td>
</tr>
</tbody>
</table>

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.
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

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.
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.

**Foundation Staff**

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

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

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