



Executive Summary
2020-2024

STRATEGIC PLAN

Building a Foundation for the Future

Table of Contents

| | |
|--|----|
| Table of Contents | 2 |
| Introductory Letter | 3 |
| Vision, Mission and Value | 4 |
| Our Goals | 5 |
| Our Voice – Community Engagement | 6 |
| Our Capacity – Endowment Growth | 7 |
| Our Impact – Strategic Grantmaking | 8 |
| Our House – Organizational Development | 9 |
| Foundation Leadership | 10 |
| Asset Growth | 11 |
| DuPage Foundation At A Glance | 12 |



David M. McGowan, CFRE
President & CEO



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



Barbara S. Szczepaniak
Vice President for
Programs



David A. Weisz
Vice President for
Finance



Ginger Wheeler
Director of
Communications

“ I have been a DuPage Foundation supporter for years and there is no entity – not one! – that is closer to two important groups of people in DuPage County: those who have the means to give and those in need. This knowledge of our community makes DuPage Foundation the single best resource available for local philanthropists.”

- John W. Vires, CFA, CFP, Mathieson, Moyski, Austin & Co., LLP



Introductory Letter

Dear DuPage Foundation Friend,

Thank you for the opportunity to present DuPage Foundation's 2020 – 2024 strategic plan to raise the quality of life throughout DuPage County.

In the past five years, we have doubled our assets, doubled our cumulative grants and responded by nearly doubling our staff to support this growth by helping area residents and organizations realize their charitable goals, providing impactful support to our community's not-for-profits and fostering key partnerships to address issues affecting our community.

Since its inception, the Foundation has grown to more than \$110 million in assets and awarded more than \$55 million in grants to not-for-profit agencies serving the residents of DuPage County and beyond. As DuPage County's philanthropic leader, we:

- Teach those who don't yet know the joy of giving how to give
- Show donors how to endow their current giving, turning annuals into perennials
- Inform those who give regionally, nationally and internationally about their opportunities to make a difference locally
- Build the capacity of our not-for-profit partners
- Help professional advisors feel prepared for their client conversations around charitable giving

Thank you for your interest in our work. We invite you to partner with us in realizing this plan for our community, so that we can **SEE MORE IMPACT** together.

Sincerely,



A handwritten signature in black ink, appearing to read 'Joe Weidenbach'.

Joseph L. Weidenbach
Chair
Board of Trustees



A handwritten signature in black ink, appearing to read 'Ernest J. Mrozek'.

Ernest J. Mrozek
Chair
Strategic Planning Committee

Vision, Mission and Value



Vision

To raise the quality of life throughout DuPage County.



Mission

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



Our Value to the Community

- We help people discover the joy of giving
- We encourage donors to leave their legacy and we ensure their wishes are honored in perpetuity
- We bring donors and community partners together to achieve goals they cannot realize on their own
- We are skilled at accepting complex gifts
- We are excellent stewards of the funds we manage
- We are transparent in all that we do
- We provide personalized attention
- We are nimble and responsive
- We connect donors to the most comprehensive information about community needs and the organizations responding to them

Our Goals



Our Voice: Community Engagement

Goal: Increase the effectiveness and reach of our messaging to engage more people and organizations in philanthropy



Our Capacity: Endowment Growth

Goal: Expand our role as DuPage County's philanthropic leader by growing our endowment



Our Impact: Strategic Grantmaking

Goal: Focus our programs and grantmaking to increase our impact on DuPage County residents



Our House: Organizational Development

Goal: Ensure that systems, procedures, facilities and human capital are in place to support our growth

“ THANK YOU!! – you all are the BEST!! It is such an honor to call you all friends! Your quick response and dedication to making our communities stronger and healthier is inspiring!”

- Amy Van Polen, Bridge Communities



Former Board Chair Denice Gierach and Strategic Planning Committee Chair Ernie Mrozek signing the Board Resolution adopting the plan.

Our Voice **Community Engagement**



Goal:

Increase the effectiveness and reach of our messaging to engage more people and organizations in philanthropy

Objectives:

1. Enhance our marketing and communication to increase awareness of the Foundation's mission
2. Create messages that compel our key audiences to action
3. Position the Foundation and our ambassadors as visible community leaders and experts in philanthropy



A brand awareness project conducted by not-for-profit communications consultant Lipman Hearne provided the Foundation with a brand marketing plan including a creative concept, manifesto and talking points.



Our Capacity Endowment Growth



Goal:

Expand our role as DuPage County's philanthropic leader by growing our endowment

Objectives:

1. Enhance the Foundation's status as DuPage County's premier charitable resource
2. Grow our unrestricted assets and key endowments to increase our annual community support and ensure that our initiatives have the resources needed to succeed
3. Foster greater engagement with professional advisors

\$75 Million Goal

A feasibility study conducted by CCS Fundraising in 2019 concluded that DuPage Foundation could raise \$50 million over five years. With additional resources dedicated to the effort, \$25 million more could be possible. A Strategic Plan Implementation Fund was created with a budget of \$2.5 million which is 10% of the additional \$25 million we hope to raise, using those funds. The first three years of funding has been secured with a balance of \$1.4 million still needed to cover the last two years.



DONOR-ADVISED FUNDS \$34 million

UNRESTRICTED FUNDS

| | |
|-------------------------|------|
| DuPage Forever Fund | \$13 |
| Field-of-Interest Funds | \$ 5 |

\$18

INITIATIVES

| | |
|-----------------------|------|
| Bright & Early DuPage | \$12 |
| Arts DuPage | \$ 4 |

\$16

RESTRICTED FUNDS

| | |
|------------------|------|
| Agency Funds | \$ 2 |
| Designated Funds | \$ 1 |

\$ 3

ADMINISTRATIVE ENDOWMENT FUND

\$ 4

\$75 million

Our Impact

Strategic Grantmaking



Goal:

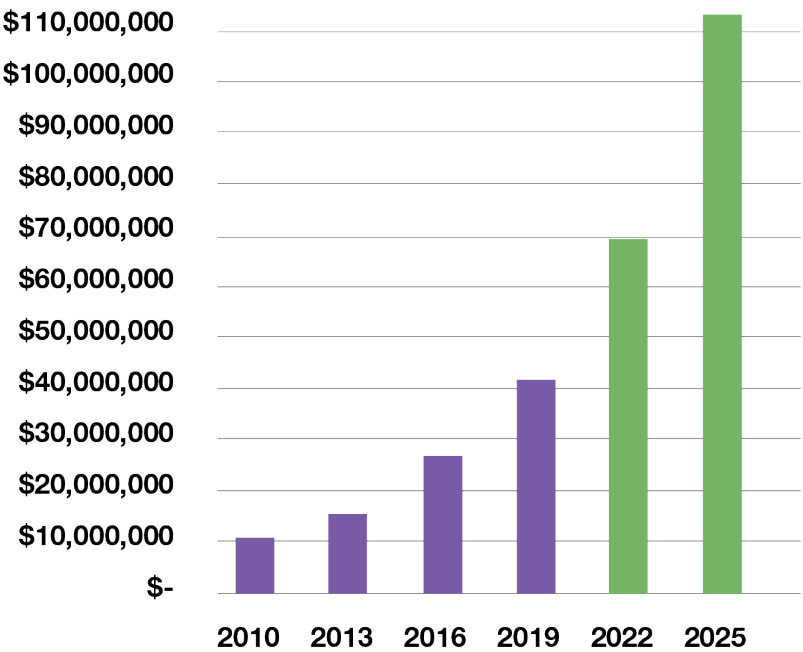
Focus our programs and grantmaking to increase our impact on DuPage County residents

Objectives:

- 1. Increase awareness of current/emerging needs; expand the leadership role and impact of the Foundation’s discretionary grantmaking
- 2. Increase the impact and reach of Bright & Early DuPage, the Foundation’s kindergarten readiness initiative
- 3. Increase the impact and reach of Arts DuPage, the Foundation’s county-wide arts council
- 4. Help donor-advisors and other community partners increase their focus on DuPage County’s needs



DuPage Foundation Cumulative Grants



Our House Organizational Development



Goal:

Ensure that systems, procedures, facilities and human capital are in place to support our growth

Objectives:

1. Expand Board and committee development to ensure the Foundation has leadership in place to achieve its goals
2. Analyze and improve information technology systems to provide excellence in financial stewardship, donor satisfaction, and community impact
3. Maintain a positive organizational culture that ensures the Foundation can continue to recruit and retain top talent
4. Evaluate facilities and fixtures to prepare for future expansion



The site of the Foundation's offices in Downers Grove since July 7, 2015.



The Foundation staff, 2019.

“As we looked around, your Covid-19 Response Fund seemed to be the quickest, most efficient and effective way to get money into the community where it was needed most. Thanks for providing the vehicle and doing the work.”

- Jim Mensching, President, Itasca Bank & Trust Co.



Foundation Leadership

Staff:

Dave McGowan, CFRE
Kait Balsewicz, CFRE
Yusra Javed Chaudhry
Laura Ernst
Mike Sitrick, JD, CFRE
Barb Szczepaniak
Debbie Venezia
Karen Vicary
David Weisz
Ginger Wheeler
Matt Wilson
Alice Wood, JD

Board of Trustees

Joe Weidenbach, Chair
Nate Wasson, Vice Chair
Del Koch, Secretary
Ted Saul, Treasurer

Wes Becton
Bill Blum
Betsy Brosnan
Betsy Goltermann
John Kaiser
Mary Kay Kluge
Gerald Lewis
Diana Martinez
Roger McDougal

Charlie McKenna
Paul Miles
Joan Morrissey
Jim Myers
Dorothy O'Reilly
Peter Paolilli
Kevin Phillips
Megan Shebik
Joyce Webb

Strategic Planning Committee

Ernie Mrozek, Chair

Wes Becton
Deb du Vair
Denice Gierach
Del Koch
Dave McGowan
Charlie McKenna
Joan Morrissey
Jim Myers

Megan Shebik
Mike Sitrick
Barb Szczepaniak
Karen Vicary
Nate Wasson
Joe Weidenbach
David Weisz
Ginger Wheeler

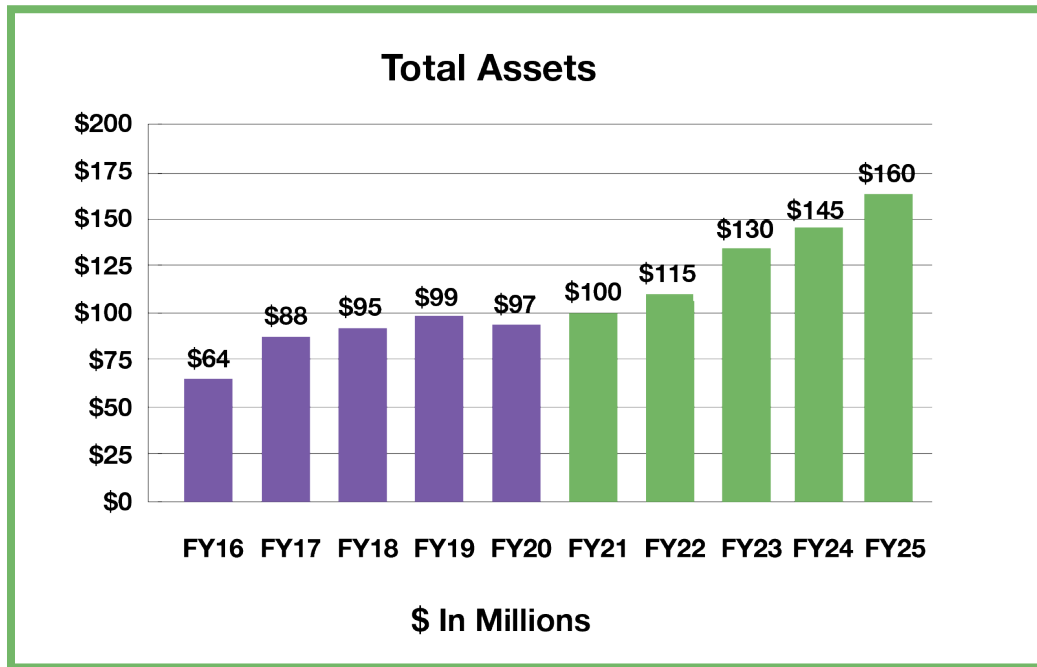


“You and your staff do us all proud.”

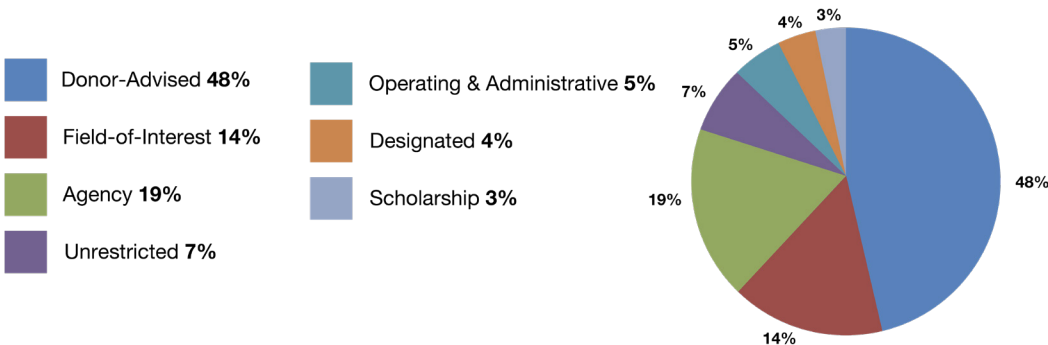
- Charlie Thurston, DuPage Foundation Founding Advisory
Board Member



Asset Growth



Assets by Fund Type as of 12/31/20



DuPage Foundation At A Glance

(as of 2/28/21)

Founded: 1986

Cumulative Grants: \$55 million

Assets: \$110 million

Legacy Society Members: 167

88 cents of each contributed dollar goes to grants and programs

Operating expenses to total assets: 1.6%

Main investment pool net performance since inception: 8.76%

Ranked 119 out of 900 U.S. community foundations by asset size

CRAIN'S Top 25 Foundation
CHICAGO BUSINESS.

West Suburban Philanthropic Network Inaugural Foundation Awardee



National Standards for U.S. Community
Foundations Accreditation



GUIDESTAR®

Guidestar Gold Seal Rating

“ Thank you for doing the work that needs to be done to shore up
these not-for-profits. We are grateful to you. ”

- Patti Gustafson, Gustafson Family Foundation Fund



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3000 Woodcreek Dr., Ste. 310
Downers Grove, IL 60515



630.665.5556



dupagefoundation.org