

DuPage
Foundation **DF**

Fiscal Year 2017 Annual Report
Partnerships

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Our Vision

To raise the quality of life throughout DuPage County.

Our Mission

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

The DuPage Foundation is DuPage County's philanthropic leader. We help area residents and organizations realize their unique charitable goals, provide impactful support to our community's not-for-profits and foster key partnerships to address critical issues affecting our community.

As our County's leading conduit for philanthropy, we provide:

- Personalized charitable services to our donors;
- Strategic grantmaking through our Community Needs Grant Program and special initiatives; and
- Assistance to not-for-profits in building and administering endowments.

Letter from our Chair and President

Dear Friends,

On behalf of the DuPage Foundation's Board of Trustees, committees and staff, we are pleased to present you with our Annual Report for the fiscal year ending June 30, 2017.

Last year, our Annual Report allowed us the opportunity to reflect upon the many contributions and milestones we achieved during the Foundation's first three decades. What a refreshing way to recall and thank the individuals and organizations that constructed the partnerships that we value today as we set our sights upon the future.

Thanks to the nurturing and growth of our many partnerships, we are honored to report that FY17 was the most successful year in our 31-plus year history. We pride ourselves on being the engine that drives philanthropy throughout DuPage County.

The Foundation completed a comprehensive rebranding with the launch of our new website at dupagefoundation.org and established a new, one-stop, online arts resource for our community at ArtsDuPage.org. We also welcomed two new collaboratives into the fold of our banner initiative—**Bright & Early DuPage**—which is working to systematically transform the early childhood care & education landscape within our community, and granted a record amount of nearly **\$5.2 million** from our various grant programs.

We are also thrilled to share that we enjoyed our strongest year of growth during FY17 with more than **\$22 million** in new assets received—helping us grow to nearly **\$90 million** in assets. The lion's share of this increase came as the result of a nearly \$17 million investment by the **Gustafson Family Foundation** to establish a donor-advised fund with us through which it will continue its grantmaking. In addition, we established 14 new funds and welcomed seven new members to the **Legacy Society**.

These results, while impressive in their own right, speak volumes about not just our organization, but about you—our incredible partners—whose generosity inspires us to work tirelessly every day for the benefit of our community.

We hope you enjoy reading more about our highlights from the past year in this report. While the Foundation is proud of our unprecedented accomplishments, they inspire us to do even more for our community moving forward.

Thank you for your continued partnership and for all that you do to foster philanthropy and raise the quality of life throughout DuPage County and beyond.

Sincerely,



Denice A. Gierach
Board Chair



David M. McGowan, CFRE
President & CEO



Denice A. Gierach,
Board Chair



David M. McGowan, CFRE
President & CEO

\$5.2M

Total Grants Awarded
During Fiscal Year
Ending June 30, 2017

\$21.1M

Total Contributions Received
in Fiscal Year 2017

\$87.8M

Total Amount of Assets
Under Foundation Management
(as of June 30, 2017)

Types of Funds

Unrestricted

These funds allow donors to create their own named fund or pool gifts of all sizes into a permanent endowment with gifts from other donors designed to provide maximum flexibility in meeting the most pressing needs of our community today and in the future.

Field-of-Interest

These funds allow donors to provide perpetual support for one or more particular areas of interest (e.g., the arts, children and youth, the environment, seniors, etc.). Some field-of-interest funds are utilized by multiple donors to pool their gifts together in support of a shared area of interest.

Donor-Advised

These funds allow donors the ability to remain an integral part of the giving process by recommending grants to the agencies and programs they wish to support, both locally and beyond. Donor-advised funds often make for an excellent alternative for people considering establishing a private charitable foundation. Private foundations can be burdensome and expensive to manage which can make succession planning for them a struggle. In contrast, a donor-advised fund can preserve anonymity for donors (if desired), provide higher potential charitable deductions on contributions, eliminate the burdens of tax filings and investment management, and free the donors and others whom they wish to be involved with the fund to focus on supporting the causes and organizations they love.

Agency & Designated

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

Operating Funds

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



Remember Us in Your Estate Plan

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

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

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

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



**It's Easier Than Ever to
Donate to the DuPage Foundation.**

Visit dupagefoundation.org.

Giving Opportunities

One of the principal advantages for people who give through the DuPage Foundation is the flexibility we provide. We offer donors a variety of tax-effective ways to make charitable gifts that achieve their goals. Donors may establish or add to a fund with any of the following assets:

Cash

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

Marketable or Closely-Held Securities

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

Real Estate

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

Life Insurance

Among the many ways to donate life insurance, the simplest way is to designate the Foundation as a beneficiary of the policy. You can also transfer ownership of a policy, donate insurance policy dividends, or name the Foundation as a policy's designated owner and beneficiary, making annual gifts to us in the amount of the annual premium. In this arrangement, the premium would be paid by the Foundation.

Retirement Plans

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

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

The contribution of privately-held business interests can also make for highly tax-efficient charitable gifts and may be utilized to establish or add to a Foundation fund. Upon making such a gift, the donor may receive a charitable deduction for the full fair market value of the donated assets and avoid capital gains tax that would be incurred if the assets had been sold. Gifting such assets has several requirements that must be carefully followed including IRS rules regarding appraisal requirements to substantiate any potential tax deduction. When seeking to make such gifts the DuPage Foundation recommends consulting with your team of professional advisors.

Transfer from an Existing Private Foundation

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



Charitable Gift Annuities

Under this type of gift, the donor transfers cash or property to the Foundation. In exchange, the Foundation promises to pay the donor or other beneficiary guaranteed fixed payments for life or a term of years, depending upon the donor's preference. The size of the payments will depend upon the age of the donor or beneficiary; however, a portion of them may even be tax-free. The gift portion of the annuity will be tax deductible to the donor.

Charitable Lead Trusts

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

Charitable Remainder Trusts

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

To learn more about each type of fund or to make a gift, please contact
Michael R. Sitrick, JD,
vice president for advancement, at
630.598.5285 or
mike@dupagefoundation.org.

Leave a Lasting Legacy

Many people wish to make a lasting impact and do something truly transformative. The DuPage Foundation's Legacy Society provides a meaningful way for us to recognize the generosity of those who have made planned gift commitments through us to benefit our community and the causes they love most.

You can create a lasting legacy through the DuPage Foundation utilizing a will, living trust, charitable remainder trust, charitable gift annuity, insurance policy or qualified retirement plan. Our role is to receive, administer and provide ongoing stewardship of your planned gift to ensure that your intentions are honored.

We offer our most sincere thanks to our special partners listed below, and to our many other friends who wish to remain anonymous, for their generosity.

Anonymous (85)

Phillip L. and Judith E. Barnett
[Phil and Judy Barnett Family Fund](#)

Howard C.* and Shirley A.* Benson
[Shirley and Howard Benson Fund](#)

Herbert J. Bock*
[Betty M. Bock Fund](#)

Ronald R. Bork*
[Ronald R. Bork Fund](#)

Jerry C.* and Betty J. Bradshaw
[Jerry Bradshaw Memorial Scholarship Fund](#)
[Megan Bradshaw Memorial Scholarship Fund](#)

Stephen M. and Emily L. Burt

Cleve E. Carney*

Linda S. Carpenter
[Linda S. and Clark G. Carpenter Fund](#)

Susanne S. Cassell
[Maple Street Chapel Endowment Fund](#)

Ruth* and Hugh* Christ
[Ruth and Hugh Christ Fund](#)

Edward S. and Shirley J. Crawford
[Shirley and Ed Crawford Fund](#)

Donald T. Dennerlein
[Donald T. Dennerlein Fund](#)

Lloyd E.* and Mary C.* Eckerson
[Monarch Landing Benevolent Care Fund](#)

Burton E.* and Patricia A. Ericson
[Burton E. and Patricia A. Ericson Family Fund](#)

Douglas G. and Martha R. Eyles
[Gene Ball Eyles Fund](#)

James Gates*
[Health Fund](#)

Leonard J.* and Barbara A. Giblin

George N. Gilkerson Jr.

Willis M. Gillett
[Willis M. Gillett Family Fund](#)

Jane Henderson*
[Rotary Club of Lombard Endowment Fund](#)

Alan D. and Jane M. Hoffmann
[Alan D. and Jane M. Hoffmann Fund](#)

James M. and Sharon A. Huck
[General Endowment Fund and Wheaton Public Library Endowment Fund](#)

Elizabeth L. Jens*
[Mental Health Association of DuPage County Endowment Fund](#)

Melvin E. and M. Joyce Johnson
[Melvin E. and M. Joyce Johnson Fund](#)

Arthur J.* and Mary* Kolar
[John and Elsie, Mary and Arthur Kolar Endowed Fund](#)

Richard W. and Mary S. Kuhn

Richard J. and Susan M. Lamb
[Richard and Susan Lamb Charitable Fund](#)

Paul J. and Coleen J. Lehman
[General Endowment Fund](#)

Estate of Grace Lopatka*
[General Endowment Fund](#)

David M. and Mary A. McGowan

Charles M. and Kathleen A. McKenna

Robert V.* and Laurie K. McMahon
[Robert and Laurie McMahon Family Fund](#)

Jack E. and Kathleen G. Mensching
[General Endowment Fund](#)

William H. Mitchell

Joseph S. and Joan S. Morrissey
[Morrissey Family Fund](#)

Ernest J. and Diane M. Mrozek

Karl W. and Jeanne M. Mueller
[Andy Mueller Memorial Fund](#)

Ramon A. Mulholland*
[Mulholland Family Fund](#)

Gwendolyn S. Mundell
[Gwen Mundell Memorial Scholarship Fund](#)

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

Brien J. and Carolyn J. Nagle

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

Timothy J. Newmann
[Janice Newmann Memorial Scholarship Fund](#)

Ellen Noth

Alyse S. and Jeffrey A. Pleiter
[Pleiter Family Fund](#)

Steven J. and Laurie Reitman

Albert A. and Mimi Rose

Michael J. Schroeck
[Michael J. Schroeck Fund](#)

F. Ron and Carol L. Seager
[Seager Family Foundation Fund](#)

Steve E. and Megan M. Shebik
[Shebik Family Fund for Basic Human Needs and the History DuPage Fund](#)

Nancy E. Sindelar*
[Freedman/Sindelar Family Fund](#)

Dianne M. Skeet*
[Donald and Dianne Skeet Fund and Donald and Dianne Skeet Scholarship Fund](#)

Michael R. and Elizabeth E. Sitrick

James M. and Ruth Ann Snodgrass
[Snodgrass Family Fund](#)

John W. "Bill" Squire*
[John W. Squire Fund](#)

David A. Stelzner and Nicki J. Krafft
[Andi Stelzner Fund](#)

Lenora J. Su, M.D.

Daniel R. and Adele M.* Szymanski
[Szymanski Family Fund](#)

Charlie A. Thurston

Mark M. and Barbara L. Turner
[Barbara and Mark Turner Scholarship Fund and Mark and Barbara Turner Fund](#)

Theodore M. Utchen

Mary Eleanor and James M. Wall
[Mary Eleanor and James M. Wall Fund](#)

Donald* and Dorothy B.* White
[General Endowment Fund and B.R. Ryall Designated Fund](#)

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

Carson R. and Dawn C. Yeager

*remembered

Shebik Family Celebrates a Strong Tradition of Giving Back to Our Community

Not many families can trace their heritage back to the earliest settlers of DuPage County from more than 175 years ago, but Steve Shebik can trace his family back to the Butterfields. After living in downtown Chicago for several years, Steve and Megan Shebik decided it was time to return to their well-established roots and moved back to their childhood home of Wheaton. Before long, the Shebiks embraced their new neighbors and called them friends. One of their neighbors was Foundation Trustee Emeritus Charlie Thurston. Thurston, who was then the Foundation's Board chair, played a pivotal role in opening the door to a special partnership that the couple continues to hold close to their heart decades later.

Both Steve and Megan possess strong financial backgrounds and had become aware of the power of growing endowment funds to support charitable giving. That was when Thurston suggested they learn more about the DuPage Foundation and the impact the organization was making locally. Thurston was one of the Foundation's earliest advocates and served on its founding Advisory Committee.

"Charlie invited us to several Foundation events," said Megan Shebik. "We were introduced to many fascinating people who shared wonderful stories about giving back to our community. We were impressed with the Foundation's staff and it made so much sense to build a relationship with them."

"It was apparent that the Foundation had a deep familiarity with DuPage County's local charitable landscape," said Steve Shebik. "They effortlessly connected individuals with not-for-profit organizations that supported their interests."

Around the time Steve's father passed away, the Shebiks were primed to pursue their passion of giving back to the community. "Our eyes were opened to the amount of need in DuPage County," said Megan Shebik. "We knew we wanted to provide for individuals and families in need of the basics of food, shelter and clothing." In 1996, they established the Shebik Family Fund for Basic Human Needs. Through this fund, they have annually recommended grants to organizations such as Bridge Communities, Inc.; Family Shelter Service; Northern Illinois Food



The Shebik family is committed to helping individuals and families in need. (Left to right) Brian, Megan, Steve, Sarah and Matt support Lurie Children's Hospital at the First Look for Charity.

Bank and the People's Resource Center.

In 2012, the Shebiks established a second fund at the Foundation, the History DuPage Fund, to honor their family's history. Through this fund, the Shebiks have recommended grants to support the DuPage Historical Museum and the Wheaton Historical Preservation Council.

In addition to establishing funds with the Foundation, Steve and Megan have been dedicated volunteers to the organization. Steve has served on the Foundation's Financial Operations Committee since 2012 and Megan has served on the Grant Committee since 2015. She recently joined the Board of Trustees and Bylaws Committee this past September.

"The Shebiks' passion for helping others in need perfectly reflects the Foundation's mission," said Dave McGowan, Foundation president & CEO. "We are honored to play an active role in helping them accomplish their charitable giving. In addition, we are pleased that the Shebiks have made commitments through the Foundation's Legacy Society for their two funds."

"We are pleased that the Foundation allows our family to support the community and keep it vibrant," said Megan Shebik. "Our family's connection to the Foundation has inspired our children to seek opportunities to help others continuing the legacy."

Fiscal Year 2017: A Year of Gr



July 2016

The Foundation celebrated its one-year anniversary at its new home, 3000 Woodcreek Drive, Suite 310, in Downers Grove.

Sabrina Lear was promoted to office manager.

August 2016

Laura Ernst was hired as program associate.

Rachel Welling was hired as development associate.

The Foundation awards its 5,000th grant.

September 2016

The Foundation celebrated its 30th Anniversary at Medinah Country Club.

Stephen Burt and Daniel Maguire retired from the Board and were named Trustees Emeriti.

Denise Gierach was named Board of Trustees chair.

The Foundation welcomed Delrose Koch to the Board.

The NGI hosted its Fall Fling at Rockwood Taphouse and showcased DuPage Senior Citizens Council and Turning Pointe Autism Foundation as its featured charities.

October 2016

Giving DuPage recognized five Foundation volunteers at Volapalooza: Dusty Holoubek, Derek Johnson, Jim Myers, Marcia Tornatore and Kat Yelle.

The Chicago Symphony Orchestra recognized the JCS Fund of the DuPage Foundation for its extraordinary history of support.

November 2016

The Foundation's Annual Benefit, "The Pearl Ball" raised nearly \$380,000 in total charitable capital.

The Foundation hosted nationally-recognized charitable planning expert Bryan Clontz, for a professional advisor seminar and Board workshop.

The Foundation and representatives from the Andi Stelzner Fund celebrated the opening of Elmhurst's Playground for Everyone.

December 2016

The Foundation awarded more than \$207,000 in Community Needs grants to 26 DuPage County not-for-profit organizations working in the areas of Arts & Culture, Education and the Environment.

The Foundation's Next Generation Initiative (NGI) hosted a holiday celebration and membership drive at The Morton Arboretum.



Great Partnerships



June
2017

The Gustafson Family Foundation voted to transfer its nearly \$17 million private foundation to establish a donor-advised fund at the DuPage Foundation.

The NGI hosted its Sizzlin' Summer Mixer at Topgolf Naperville and showcased Linden Oaks Behavioral Health and World Relief DuPage/Aurora as its featured charities.

The Foundation awarded more than \$800,000 in Community Needs/ Bright & Early DuPage grants to 37 health & human services organizations and six local collaborations during the Spring Grant Breakfast at Glen Oak Country Club.

The 2017 Spirit of Volunteerism Awards were granted to Glen Ellyn Children's Resource Center, Access DuPage, and DuPage Habitat for Humanity.

January
2017

The Foundation sponsored The Conservation Foundation's DuPage Environmental Summit for the 11th consecutive year.

Michael Sitrick, Foundation vice president for advancement, was named president of Suburban Chicago Planned Giving Council (SCPGC).

February
2017

The Foundation hosted a launch party for ArtsDuPage.org, an online resource for DuPage arts and cultural events, at the College of DuPage's McAninch Art Center.

The Foundation remembered Co-Founder Brooks McCormick on what would have been his 100th birthday.

The Foundation welcomed Roger McDougal and Megan Shebik to the Board of Trustees.

March
2017

The Next Generation Initiative (NGI) hosted its Spring Soirée at Emmett's Brewing Company in Downers Grove and showcased DuPagePads and The Conservation Foundation as its featured charities.

Arts DuPage hosted its first convening for visual artists and exhibitors.

April
2017

The Foundation published Bright & Early DuPage's first community report celebrating the accomplishments of its first five years.

Foundation Trustee Dick Kuhn presented "Estate Planning for Second Marriages: *The Dos, Don'ts and Opportunities Not to Overlook*" as part of the Foundation's Continuing Education Series for Professional Advisors.

May
2017

The Foundation launched its newly rebranded website.

Debbie Venezia was hired as the new director of Arts DuPage.

The Foundation surpassed \$100 million in charitable capital: \$70 million in total assets, and \$30 million in cumulative grants.

Arts DuPage hosted a convening for performing artists and presenters.

Grantmaking:

The Foundation's Heart & Soul

Through our **Community Needs Grant Program**, the DuPage Foundation supports programs and projects aimed at improving and enriching the quality of life for DuPage County residents. During our two grant cycles each year, we accept applications from local not-for-profits serving our community in the areas of: **Arts & Culture, Education, the Environment, and Health & Human Services.**

"During these challenging times with many organizations feeling the effects of cut backs, the Foundation is pleased to provide support and much needed resources to effectively serve their constituents," said **Barb Szczepaniak**, Foundation vice president for programs.

Serving on the Grant Committee is an eye-opening experience and emphasizes how the Foundation empowers local not-for-profits to effect change. "I knew DuPage County was great, but I didn't know how rich it is in services until I joined the Committee," said **Dianne Engram**, Grant Committee member.

Recently, several members of the Foundation's Grant Committee reflected upon the selection process and provided tips to make applications resonate.

What makes a quality grant application?

"A quality application has a budget that makes sense relative to the scope of the project and clearly outlines what is being requested," said **Ruth Carlson**, Grant Committee member.

"Show us specifics about the project such as who it will impact and how it will be achieved," said **Joe Weidenbach**, Foundation Grant Committee chair. "Requests should clearly outline what the need is and how the organization is working to solve it."

"I want to see details about who will benefit from the services the Foundation funds," said **Lamonte Coleman**, Foundation Trustee. "Let us know who the audience is."

"We look at the follow-up from previous grants to ensure that organizations are accountable and showed the results of the program," said **Supriya Jasuja**, Grant Committee member.

Why do some applications stand out over others?

"We look at the amount of each request compared to the scope of the project," said **Roger McDougal**, Foundation Trustee. "We like seeing that our grant is making an impact and not just a drop in the bucket. The request should also be appropriate and achievable, not too ambitious."

"We have been directed by the Foundation's Board to make strategic grants," said **Betsy Brosnan**, Foundation Trustee. "We like to see our grants giving a 'seal of approval' to organizations and help grantees leverage additional funds."

What is most satisfying about being on the Grant Committee?

"Grantmaking is the heart and soul of why the Foundation exists," said **Mary Kay Kluge**, Foundation Trustee.

Types of Grants

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

Unrestricted Funds

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

Field-of-Interest Funds

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

Community Needs Grants

Arts & Culture

American Wind Band: \$2,350

To support the rental costs of four concert venues in an effort to expand the Band's reach throughout DuPage County.

Anima-Glen Ellyn Children's Chorus: \$10,000

To support music education and performance opportunities for youth through music of 21st century composers and to engage the community with affordable/accessible programs and concerts.



Buffalo Theatre Ensemble: \$20,000

To support the reinstatement and continued operation of Buffalo Theatre Ensemble in its 30th anniversary season.

Downers Grove Choral Society: \$2,500

To support the "For the Love of Song" concert with the Spirito singers.

Lizzadro Museum of Lapidary Art: \$5,000

To support the educational and cultural programs, special exhibits, and events offered at the Lizzadro Museum.

One Voice Outreach Choir: \$2,500

To provide three scholarships for choir members and to support cultural enrichment activities to enhance performances.

Opera for the Young: \$2,500

To support six performances of Opera for the Young's adaptation of Donizetti's "The Elixir of Love" in DuPage County elementary schools, featuring a student chorus prepared by each school's music teacher.

The Naperville Men's Glee Club: \$2,000

To provide cancer survivors with complimentary tickets for the "Voices of Hope" concert featuring local singers affected by cancer.

Young Naperville Singers: \$2,500

To support "Diva Night," a one-day seminar, for girls in grades 3-5 to encourage awareness and appreciation of choral arts in our community.

Total Arts & Culture Grants: \$69,050*



Top: Downers Grove Choral Society

Middle: Lizzadro Museum

Bottom: Young Naperville Singers

***Please note that Community Needs Grant totals per category include fully-funded donor-advised grants found on pages 17-18.**

Community Needs Grants

Education

Bartlett Learning Center, Inc.: \$10,000

To support a Certified Art Therapist to provide creative and emotional outlets for students and residents with developmental, learning and behavioral disabilities.

DuPage Children's Museum: \$15,000

To support the Family Access Membership Program that will enable low-income families to have unlimited access to the DuPage Children's Museum's educational exhibits and programs.

Glen Ellyn Children's Resource Center (Partially funded by the Silver Heart Foundation): \$20,000

To support after-school and summer academic programming for low-income Glen Ellyn students.

I Support Community: \$10,000

To support the Inside Out Club, where children learn and put into practice key character traits through lessons on local charities and volunteer activities.

Junior Achievement of Chicago: \$11,500

To support Junior Achievement programs at a low-income school in Addison.

KidsMatter: \$9,000

To support the KidsMatter Job Fair that provides employment opportunities and workforce preparation via mock interviews, résumé building, social media/career information, and internship opportunities.

Literacy DuPage: \$17,500

To support the free, accessible and customized tutoring program for adult learners to increase their English language and literacy skills to help them become self-sufficient.

Total Education Grants: \$108,000*

***Please note that Community Needs Grant totals per category include fully-funded donor-advised grants found on pages 17-18.**



Top: I Support Community

Bottom: KidsMatter

Environment

The Conservation Foundation: \$20,000

To support the Conservation in Our Community program that is focused on increasing conservation practices based on the specific priorities of local municipalities.

The Morton Arboretum: \$10,000

To support the Macgyver program, a STEM program designed to increase science literacy, nature appreciation, and career modeling/mentoring for middle and high school students.

Total Environment Grants: \$30,000*

Health & Human Services

B.R. Ryall YMCA of Northwestern DuPage County: \$6,350

To support the Diabetes Prevention Program that will decrease or eliminate the risk of type II diabetes for Glendale Heights participants.

CareNet Pregnancy Services of DuPage: \$8,000

To support the expansion of CareNet's medical program that will provide free pregnancy tests and ultrasound services to an increasing number of women in need who experience an unplanned pregnancy.

Catholic Charities, Diocese of Joliet: \$20,000

To support emergency service and homeless prevention assistance to residents who are homeless or at risk of homelessness through the provision of financial support and case management.

Chicago Dental Society Foundation: \$20,000

To support the free dental clinic, which provides basic dental care to improve oral health in underserved individuals in DuPage County.

DayOne PACT: \$2,500

To support the Parent Support Project in assisting parents who encounter barriers to services for their disabled children.

Donka, Inc.: \$10,000

To support computer training with assistive technology for seniors with visual or physical disabilities.

DuPage Federation on Human Services Reform: \$15,000

To support the Welcoming Center that connects immigrant residents of DuPage County with culturally appropriate services and resources geared toward improving socioeconomic and health outcomes.

DuPage Senior Citizens Council: \$10,000

To support the Well Being Checks Program, a value-added program that accompanies all services to ensure seniors are in good mental and physical health and to assure their surroundings are safe and secure.

Elmhurst Walk-in Assistance Network: \$10,000

To provide emergency financial assistance to people in need in Elmhurst.

ESSE Adult Day Services: \$5,500

To purchase 12 recliner chairs to accommodate participants' medical conditions.

Family Focus: \$10,000

To support Healthy Families DuPage, an evidence-based early intervention program shown to reduce rates of child abuse and neglect in low-income Spanish-speaking families.

Family Shelter Service: \$20,000

To support the emergency shelter, which provides safe refuge to victims of domestic violence and their children.

The GardenWorks Project: \$2,304

To purchase supplies for the Home Gardening Program which teaches low-income families how to grow fruits and vegetables at home.

Giant Steps: \$20,000

To purchase program and technology supplies for the day school which provides social-emotional learning and specialized academic instruction for children and youth with autism.

Glen Ellyn Youth and Family Counseling Service: \$2,500

To supplement reduced fees charged to Community Counseling and Education Program clients, and to provide curriculum and materials for small group work with 30 high school students.

H.O.M.E. DuPage (Partially funded by the Sue Wallace Fund): \$20,000

To provide year-round financial literacy workshops and one-on-one counseling to empower low-to-moderate income individuals and families to achieve self-sufficiency and financial stability.

Loaves & Fishes

Community Services: \$20,000

To support the purchase of a food rescue truck for food distribution operations in DuPage County.

www.dupagefoundation.org

Community Needs Grants

Mayslake Village (Partially funded by the Linda & Clark G. Carpenter Fund): \$5,000

To support the Spread the Health Program, which provides low-income senior citizens with assistance for dental, vision and hearing aid needs that are not covered by Medicare.

NAMI DuPage: \$20,000

To provide wraparound education and supportive services targeting at-risk groups such as seniors, veterans, women and individuals in the criminal justice system due to their mental illness.

Northeast DuPage Family and Youth Services: \$10,000

To support the salary of a clinician for the SPARCS program, a group therapy intervention for adolescents dealing with chronic stress and/or trauma.

Northern Illinois Food Bank: \$20,000

To support the Take 50 Foods to Encourage Program where local food pantries get a 50% credit when selecting highly nutritious foods to distribute to clients.

People's Resource Center: \$9,734

To support the purchase of a new heating unit to replace a cracked unit at PRC-Southeast.

Project HELP

(Partially funded by the Betty M. Bock Fund): \$12,000

To support Project HELP's Parent Mentor Program and Parent Education Workshops that build on family strength and resilience, and minimize the risk of child abuse and neglect.

Ronald McDonald House Charities of Chicagoland & Northwest Indiana (Funded by a pass-through grant from The McWethy Foundation): \$3,400

To support the Ronald McDonald House, near Central DuPage Hospital, to provide DuPage County families the care and resources they need to keep close to their sick child receiving medical treatment.

Serenity House Counseling Services, Inc.: \$10,000

To support the Adolescent Intensive Outpatient Program, which is focused on reducing teen drug use in DuPage County through counseling, enrichment, and family support.

Sharing Connections: \$6,000

To support the Good Night's Sleep Program - Beds for At-Risk Children by funding twin mattresses and box springs for children in DuPage County who do not have beds of their own in which to sleep.



Above: Sharing Connections

UCP Seguin of Greater Chicago: \$17,500

To support the Building Bridges to the Future Transition Program that will facilitate the successful transition into adulthood of at least 42 DuPage County students with developmental disabilities.

Wayne/Winfield Area Youth/Family Services (WAYS): \$2,500

To provide low-income, high-risk youth with job readiness skills and career exploration and to provide youth and their families exposure to opportunities that increase long-term self-sufficiency.

Western DuPage Special Recreation Association: \$15,000

To support scholarships which will enable adults with disabilities to participate in accessible recreational activities.

Youth Outlook: \$20,000

To support wellness and educational programs for LGBTQ youth, as well as education to youth-serving adults, to create a more welcoming, tolerant, and safe community for all youth in DuPage County.

Total Health & Human Services Grants: \$483,288*

Donor-Advised Funds

The following grants were fully-funded from Foundation donor-advised funds upon recommendations by their fund advisors in response to Community Needs grant applications that were received.

Arts & Culture

Addison Center for the Arts (Funded by the JCS Fund): \$3,700

To support “Arts Alive: An After-School Program,” a free program for junior high students covering the disciplines of music, theater and visual arts.

BrightSide Theatre (Funded by the Michael J. Schroeck Fund): \$1,000

To partially support the organization’s website redesign.

Chicago Sinfonietta (Funded by the JCS Fund): \$10,000

To support community engagement concerts and a five-concert subscription season at North Central College’s Wentz Concert Hall.

ClaySpace NFP (Funded by the JCS Fund): \$2,500

To purchase a glaze table that will serve the resident artists, teachers and students by making the creation of glazes safer.

Elmhurst Symphony Association (Funded by the JCS Fund): \$2,500

To support the School Outreach program where professional musicians visit local schools to perform and teach students about their instruments.

Education

Dare to Dream: Get Educated! (Funded by the Donor-Advised Fund for Needy Children and the Snodgrass Family Fund): \$10,000

To support the Dare to Dream conference focused on educating 6th-8th grade Latina girls and their mothers about the value of higher education.



Above: Dare to Dream: Get Educated!

DuPage County Historical Museum Foundation (Funded by the Snodgrass Family Fund): \$2,500

To support the “1917: Catalyst for the Modern Era” exhibit and programming.

West Suburban Humane Society (Funded by the Companions’ Fund): \$2,500

To provide 25 scholarships for low-income children to attend a summer camp focused on teaching compassion, generosity and responsibility through a humane education program.

Health & Human Services

360 Youth Services (Funded by the Betty M. Bock Fund): \$15,000

To empower homeless youth, 18-24 years old, by providing housing and support that improve life skills, employment goals and an educational path leading to a lifetime of healthy self-sufficiency.

Bridge Communities, Inc. (Funded by the Snodgrass Family Fund): \$20,000

To support the Children’s Services Program that promotes children’s resiliency and self-sufficiency in order to break the cycle of poverty in the family.

***Please note that Community Needs Grant totals per category include fully-funded donor-advised grants found on pages 17-18.**

Community Needs Grants



Above: Friends for Therapeutic Equine Activities (FTEA)

DuPage Health Coalition/Access DuPage (Funded by the DuPage Medical Group Charitable Fund): \$20,000

To support the opening of a new pharmacy offering free medications to low-income and uninsured DuPage residents.

DuPagePads (Funded by the Betty M. Bock Fund): \$20,000

To support the Family Outreach program that focuses on ending homelessness for families by providing access to stabilizing services and consistent case management.

Friends for Therapeutic Equine Activities (Funded by the Edward & Minnie Ceragioli Fund): \$15,000

To support the Therapeutic Horseback Riding Program for children and adults with disabilities.

Outreach Community Ministries Inc. (Funded by the Snodgrass Family Fund): \$20,000

To support after school and summer programs that equip at-risk students from the Brandywine neighborhood for academic success and improve their future life options.

Teen Parent Connection (Funded by the Betty M. Bock Fund): \$20,000

To support Adolescent Family Strengthening programs, which provide a continuum of support, education, and resources to teenage parents and their children.

Total Donor-Advised Grants in Response to Community Needs Applications (Partial and Fully-Funded): \$189,000

Who We Help

Donors

When you have a desire to make a difference for the causes that matter most to you, we can help. As a community foundation, we can guide you, your family, or business in creating a charitable plan that will meet your unique needs. Whether you are looking to give today or leave a legacy, our professional staff is committed to providing you with the highest degree of efficiency, flexibility and personalized service to achieve your goals and help you enjoy the maximum tax benefits from your giving.

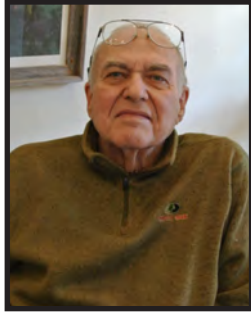
Not-For-Profits

For more than 30 years, the DuPage Foundation has worked closely with our community's not-for-profit sector to support their efforts and build meaningful partnerships aimed at raising the quality of life for the residents of DuPage County. From our grantmaking activities and other initiatives to our many collaborations and stewardship of endowment funds on behalf of scores of area organizations, we strive to help strengthen our partners and aid them in achieving their missions.

Professional Advisors

Whether you are an accountant, attorney, financial advisor, life underwriter or trust officer, the DuPage Foundation is here to support you in helping your clients accomplish their charitable goals. From offering back-office support and in-person consultations to providing continuing education seminars, helpful resources on charitable planning, and site visits to local charities, we welcome the opportunity to assist you in helping your clients explore and understand the full range of charitable opportunities available to them and the vehicles to best meet their needs.

Welcome, New Fund Partners



"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
Forum Financial Management**

The DuPage Foundation was pleased to welcome 14 new funds during the fiscal year ending June 30, 2017.

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

Agency Endowment & Designated Funds

- Adolescent Fund of Central DuPage Pastoral Counseling Center
- James R. Bonde Memorial Fund of Central DuPage Pastoral Counseling Center
- The Conservation Foundation Agency Fund
- Rotary Club of Wheaton A.M. Designated Fund II
- Trinity Episcopal Church Mortgage & Building Fund
- Wheaton Municipal Band Allan P. Loek Endowed Trombone Chair Fund
- Wheaton Public Library Agency Endowment Fund

Donor-Advised Funds

- Corrigan Family Fund
- Gustafson Family Foundation Fund
- Tyrrell Family Foundation

Field-of-Interest & Unrestricted Funds

- Ronald R. Bork Fund
- John J. Bryant Fund
- Douglas A. Schooley Memorial Fund

Scholarship

- Joe Newton Scholarship Award of Excellence



Statement of Financial Position

ASSETS (AS OF JUNE 30, 2017)

	2017	2016
Cash	\$ 1,863,485	\$ 2,332,839
Administrative Fees Receivable	132,859	122,363
Prepaid Expenses and Other	40,289	32,592
Charitable Lead Trust Receivable	178,659	183,525
Investments	82,311,597	59,659,664
Reinsurance Contract	67,219	96,271
Pledges Receivable	1,280,164	2,000
Cash Value of Life Insurance	544,015	544,284
Other Assets	-	28,000
Property and Equipment, Net	1,402,894	1,454,426
Total Assets	\$ 87,821,181	\$ 64,455,964

LIABILITIES AND NET ASSETS (AS OF JUNE 30, 2017)

Liabilities

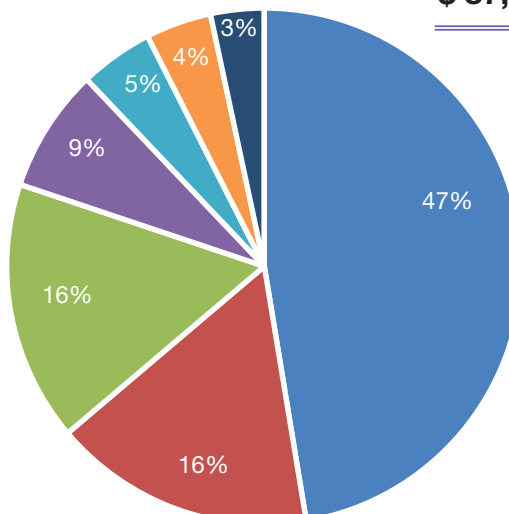
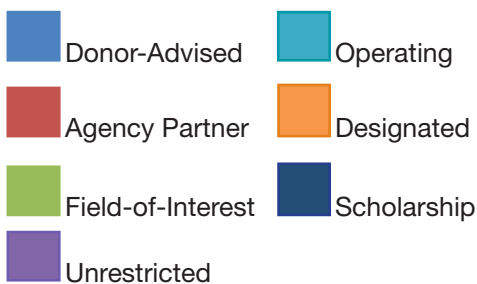
Accounts Payable	\$ 8,739	\$ 1,047
Agency Funds	14,427,215	11,712,752
Annuity Payable	193,379	241,533
Accrued Liabilities	41,374	28,729
Total Liabilities	\$ 14,670,707	\$ 11,984,061

Net Assets

Unrestricted	\$ 6,823,203	\$ 7,099,481
Temporarily Restricted	28,553,055	8,550,245
Permanently Restricted	37,774,216	36,822,177
Total Net Assets	\$ 73,150,474	\$ 52,471,903

Total Liabilities and Net Assets

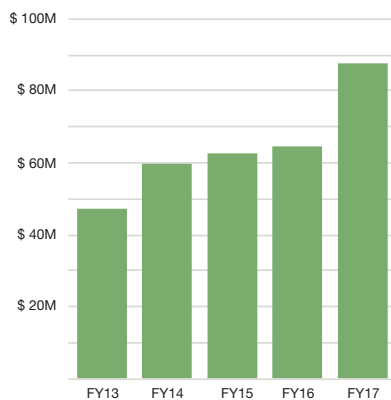
\$ 87,821,181	\$ 64,455,964
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Statement of Activities

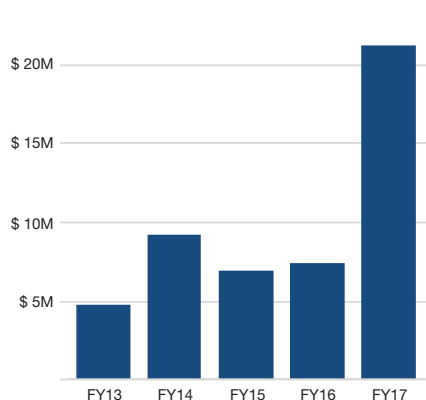
	<u>Unrestricted</u>	<u>Temporarily Restricted</u>	<u>Permanently Restricted</u>	<u>Total</u>	<u>2016</u>
Revenue					
Gifts, Bequests, and Grants	\$ 726,851	\$ 19,458,451	\$ 952,039	\$ 21,137,341	\$ 7,360,931
Interest and Dividend Income	215,768	826,705	-	1,042,473	983,365
Net Investment Gains (Losses)	915,382	4,323,844	-	5,239,226	(1,129,319)
Administrative Fees	111,846	-	-	111,846	105,185
Net Assets Released from Restrictions	4,606,190	(4,606,190)	-	-	-
Total Support and Revenue	\$ 6,576,037	\$ 20,002,810	\$ 952,039	\$ 27,530,886	\$ 7,320,162
Expenses					
Grants Awarded	\$ 5,163,818	-	-	\$ 5,163,818	\$ 3,672,065
Grantmaking Activities	853,013	-	-	853,013	808,878
Management and General	392,290	-	-	392,290	436,949
Fundraising	443,194	-	-	443,194	324,629
Total Expenses	\$ 6,852,315	-	-	\$ 6,852,315	\$ 5,242,521
Increase (Decrease) in Net Assets	(\$ 276,278)	\$ 20,002,810	\$ 952,039	\$ 20,678,571	\$ 2,077,641
Net Assets - Beginning of Year	\$ 7,099,481	\$ 8,550,245	\$ 36,822,177	\$ 52,471,903	\$ 50,394,262
Net Assets - End of Year	\$ 6,823,203	\$ 28,553,055	\$ 37,774,216	\$ 73,150,474	\$ 52,471,903

Assets



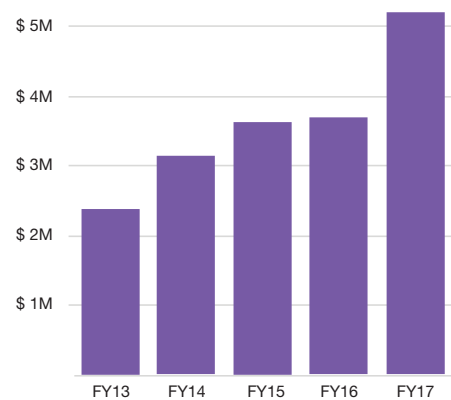
FY13	\$ 47,016,028
FY14	\$ 59,537,304
FY15	\$ 62,815,765
FY16	\$ 64,455,964
FY17	\$ 87,821,181

Contributions



FY13	\$ 4,603,110
FY14	\$ 9,090,740
FY15	\$ 6,810,927
FY16	\$ 7,360,931
FY17	\$ 21,137,341

Grants



FY13	\$ 2,360,061
FY14	\$ 3,095,458
FY15	\$ 3,598,673
FY16	\$ 3,672,065
FY17	\$ 5,163,818

The fiscal year 2017 audit for the DuPage Foundation was performed by Plante Moran PLLC. These summarized financial statements are condensed from the audited statements which are available on the Foundation's website.

Nagle Believes Charitable Giving Starts from the Heart

For more than three decades, the DuPage Foundation has flourished in large part due to the strong partnerships we have established with area professional advisors. Trusted advisors such as accountants, attorneys, life underwriters and wealth managers often play a critical role in helping their clients plan and implement their charitable giving. The Foundation recognizes this and strives to work closely with our donors and their advisors to help identify the most optional solutions to achieve their goals.

Brien Nagle, a Naperville-based attorney with **Nagle Obarski, PC**, has helped the Foundation accomplish its mission since before our doors opened in 1986.

“What most people don’t know is that Brien has been supporting the Foundation since even before our official founding,” said **Dave McGowan**, Foundation president & CEO. “He worked in a law firm with **Carleton Nadelhoffer**, who was one of the Foundation’s first Advisory Committee members from 1986-1988.” That association brought Nagle into the fold assisting Foundation Co-Founders **Brooks McCormick** and **Mary Eleanor Wall** from day one. Little did those original volunteers know that they had recruited one of the Foundation’s strongest planned giving advocates.

“Charitable giving starts from the heart,” said Nagle. “I like to ask clients what they are passionate about, and why that particular passion resonates with them. That begins dictating the direction of what they will ultimately choose to do and determining the best method to achieve their goals.”

Nagle understands that planned gifts are extremely powerful tools and that the Foundation can help people provide for the causes and organizations that matter most to them and their families through their wills, trusts, IRAs and other vehicles. “I have total confidence in working with the DuPage Foundation,” said Nagle. “Whenever I have referred clients to the DuPage Foundation, my clients have always come back and thanked me for making the referral.”

Recently, Nagle consulted with the family of a young woman afflicted with a serious illness. The



Brien Nagle (center), a Foundation Professional Advisor Committee member and attorney from Nagle Obarski PC, attends an installment of the Foundation's Continuing Education Series for Professional Advisors with Delrose Koch (left), Foundation Trustee, and Nancy Hermann (right), Professional Advisor Committee member.

family knew that they wanted to help their daughter, but they were inspired to assist other individuals who are experiencing this particular condition. “With limited research about this illness, they didn’t want to make a commitment to one particular institution,” said Nagle. “A DuPage Foundation donor-advised fund was the perfect solution for them. Now they are raising funds and recommending grants to the most current applicable research hospitals and organizations.”

“I truly enjoy the opportunity to consult with the DuPage Foundation,” said Nagle. “The staff’s expertise regarding the many unique ways to give and their deep familiarity with the local charitable landscape make them the ideal partner. They help my clients focus their objectives, learn more about various causes and not-for-profit organizations and how best to support them.”

The Foundation is privileged to work with a wide breadth of knowledgeable professional advisors, like Nagle, throughout DuPage County and the greater Chicago area who are committed to encouraging philanthropy and helping their clients realize their goals. We thank Brien and all of our advisor friends for their strong partnership and are proud to work with them on behalf of their clients and our communities.

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Changing of the Guard!



Denice Gierach, Foundation Board chair (far left) and Dave McGowan, Foundation president & CEO (far right), welcome four new Trustees during the Annual Meeting and Reception at Stonebridge Country Club in Aurora: John Kaiser (left), Denise Horne (center left), Bill Blum (center right), and Dorothy O'Reilly (right).



Denice Gierach, Foundation Board chair (center left) and Dave McGowan, Foundation president & CEO (far right), recognized three retiring Trustees during the Annual Meeting and Reception: Phil Cabrera (far left), Marilyn Gaston (center), and Richard Kuhn (center right).

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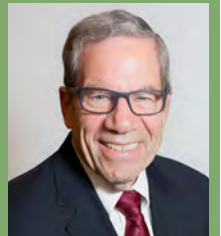
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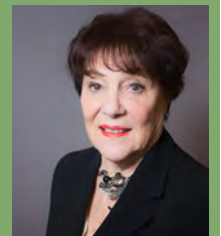
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Welcome New FY18 Trustees

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