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.

**We provide:**
- Personalized charitable services to our donors.
- Strategic grantmaking through our Community Needs grant program and special initiatives.
- Assistance to not-for-profits in building and administering endowments.

### Who We Help

**Donors**
Whether you’re looking to give today or leave a legacy for the causes that matter most to you, we provide the highest degree of efficiency, flexibility, and personalized service to help you achieve your goals and maximize your tax benefits.

**Not-For-Profits**
For more than 30 years, we’ve supported our community’s not-for-profits’ efforts to raise the quality of life for DuPage County residents. We strive to help strengthen our partners and aid them in achieving their missions.

**Professional Advisors**
We support attorneys, financial advisors, accountants, trust officers, and life underwriters in helping their clients accomplish their goals. Services include in-person consultations, educational seminars, charitable planning resources, and visits to charities.

### From July 1, 2017 - June 30, 2018

- **$5.9M** Contributions Received
- **$4.8M** In Grants Awarded
- **$94.9M** Assets Under Management

### What’s Inside?

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Dear Friends,

Thank you for all you have done to make this another great year for our community through your support of the DuPage Foundation. Through our leadership role, we are pleased to advocate for and work toward an enhanced quality of life for all DuPage County residents.

From July 2017 - June 2018, you helped us achieve a new record in charitable assets under management of nearly $95 million. We also surpassed 150 members of our Legacy Society with tens of millions of dollars in pledged estate gifts. Why is that important? Because the larger our endowment, the more grants we can make and the larger impact we can have on issues affecting DuPage County.

Speaking of grants, we also surpassed more than $35 million in cumulative grants awarded in our 32-year history. Nearly $5 million of that was granted in fiscal year 2018 alone.

And what does asset growth and increased grantmaking mean to our community? It means greater impact in early childhood care and education, in the arts, in addressing basic human needs, and in raising the quality of life for our residents.

Keep in mind there is much that our Board, committee members, and staff do that isn't reflected on our financial statements. We make referrals, connect donors to critical needs and funding opportunities, convene groups working in similar areas, counsel, and coach.

Let us know if there is more we can do for you, and thank you again for supporting us in our mission to foster philanthropy, connect donors to area needs, and build community partnerships.

Sincerely,

Denice A. Gierach
Board Chair

David M. McGowan, CFRE
President & CEO

Kaitlyn M. Balsewicz
Development Officer
Winfield

Laura R. Ernst
Program Associate
Wheaton

Melissa C. Fischer
Marketing Manager
Lemont

Michael R. Sitrick, JD
Vice President for Advancement
Lombard

Barbara S. Szczepaniak
Vice President for Programs
Elmhurst

Deborah L. Venezia
Director of Arts DuPage
Naperville

Karen L. Vicary
Office Manager
Carol Stream

David A. Weisz
Vice President for Finance
Carol Stream
Giving Opportunities

One advantage of giving through the DuPage Foundation is flexibility. We offer a variety of tax-effective ways to make charitable gifts. Donors may establish or add to a fund with gifts of one or more of the following:

**Cash**
Qualifies for the maximum allowable income tax deduction.

** Marketable or Closely-Held Securities**
May be given directly, allowing you to deduct their current market value as a charitable contribution and avoid capital gains tax on the appreciation.

**Real Estate**
May be given at its current market value allowing a full deduction and avoiding capital gains tax on the appreciation.

**Life Insurance**
The simplest way is to designate the Foundation as a policy beneficiary. You can also transfer ownership of a paid-up policy, donate policy dividends, or name us as a policy's designated owner and beneficiary, making annual tax-deductible gifts to us in the amount of the premium. Under this arrangement, the Foundation would pay the annual premium.

**Retirement Plans**
Donors can make contributions from an IRA or other retirement assets such as a 401(k), Keogh, or 403(b).

**Business Interests, Including Partnerships and Interests in C Corporations, S Corporations, and LLCs**
Contributions of privately-held business interests can make highly tax-efficient gifts. You may receive a charitable deduction for the full fair market value of the donated assets and avoid capital gains tax that would be incurred if sold. Gifting such assets has requirements and rules that must be followed. Consult your advisors.

**Transfer from an Existing Private Foundation**
Administering a private foundation under IRS rules can be burdensome and expensive. Transferring the assets into a donor-advised fund provides a simpler, cost-effective alternative.

**Charitable Gift Annuities**
In exchange for cash or property, the Foundation pays the donor or beneficiary guaranteed fixed payments for life or a term of years. The size of the payments depends on age; however, a portion may be tax-free. The gift portion of the annuity will be tax deductible.

**Charitable Lead Trusts**
Trusts provide income to a Foundation fund for a set number of years, the lives of individuals, or a combination of both as specified by the donor. At the end of that time, the remaining principal of the trust and any accumulated appreciation is distributed to children, grandchildren, or other beneficiaries, often with significant tax savings.

**Charitable Remainder Trusts**
Donors receive income for life or a number of years. At death or term expiration, the remainder passes to the Foundation for the donors’ charitable goals.
Welcome, New Fund Partners

We are grateful to our many donors and agency partners for their confidence and trust in our stewardship. Welcome, new fundholders!

Agency Endowment & Designated Funds

- Arts DuPage Endowment Fund
- Bob “Doc” Adams Legacy Fund (Midwest Shelter for Homeless Veterans)
- Bridge Communities, Inc. Founders’ Fund
- FORWARD Fund
- Glen Ellyn Fund
- Kiwanis Club of Central DuPage Agency Fund
- NAMI DuPage Charitable Gift Annuity Fund
- West Suburban Philanthropic Network Agency Fund
- Wheaton Community High Schools Alumni Club Youth Wrestling Fund
- Wheaton Public Library – Adams Memorial Fund

Donor-Advised Funds

- Beck Family Foundation
- Effort Counts Twice Fund
- Kohl Family Fund
- Linnea Rutkowski Smile Fund
- Mrozek Family Fund
- Ritzman Family Fund

Types of Funds

Unrestricted
Allows donors to pool gifts of all sizes into a permanent endowment designed to provide the Foundation maximum flexibility in meeting the most pressing needs of our community today and in the future.

Field-of-Interest
Allows donors to pool their gifts into common funds to generate perpetual support for a shared area of interest (e.g. the arts, children and youth, the environment, seniors, etc.)

Donor-Advised
Allows donors to streamline their giving and grantmaking through one fund to recommend grants to their favorite causes and charities on their timetable.

Agency & Designated
Provides perpetual support for specific not-for-profits. They can be established by the agency or a donor.

Operating Funds
Support general Foundation operations.

To learn more, contact Michael Sitrick, JD, vice president for advancement, at mike@dupagefoundation.org or 630.598.5285.
Leave a Lasting Legacy

The DuPage Foundation’s Legacy Society honors those generous, forward-thinking donors who made a commitment to secure DuPage County’s future by including the Foundation in their estate plans. These planned gifts have the impact to do something truly transformative in the community and for the causes they love most.

You can create a lasting legacy by 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 your intentions are honored.

Our most sincere thanks to our special partners below, and to our many friends who wish to remain anonymous, for their generosity. Members as of June 30, 2018 are as follows.

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 and Megan Bradshaw Memorial Scholarship Fund
- John J. Bryant*
- John J. Bryant 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 Family 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. Gibli
- 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 Eisle, Mary and Arthur Kolar Endowed Fund
- Kathleen Lamonica Krochock
- Joseph P. and Margery E. Lamonica Family Fund
- Richard W. and Mary S. Kuhn
- Richard and Susan 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 History DuPage Fund
- Nancy E. Sindelar*
- Freedman/Sindelar Family Fund
- Michael R. and Elizabeth E. Sitrick
- Dianne M. Skeet*
- Donald and Dianne Skeet Fund and Donald and Dianne Skeet Scholarship Fund
- 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
When Joseph and Margery Lamonica committed to something, they were all in. That’s one thing that the youngest of their six children, Kathleen Lamonica Krochock, remembers about her parents: their commitment. “It’s why I want to give back and support the community in which they raised me,” she explained. “For me, that’s both personal and professional.”

As a trust officer and attorney for 34 years, currently at The State Bank of Geneva, Krochock has spent her career helping families at what are often the most difficult times in their lives. She works closely with their professional advisors to create estate plans and ensure that those plans are executed in accordance with the decedents’ wishes. For her, implementing the charitable giving part of their plan with the organizations they care about most is a joy.

From an advisor’s standpoint, Krochock speaks highly of donor-advised funds (DAFs) as an effective charitable tool. It’s why she recently took her own advice and opened a DAF with the DuPage Foundation. “The Foundation is the right partner to honor my parents because of their local expertise in community needs,” she said. “This fund will honor the great life they gave us in DuPage County.”

“Donor-advised funds are easy,” Krochock said. “You don’t need to have an estate plan done in order to start one. You can fund it during your lifetime or at time of death.” That is why she’ll continue contributing to this fund and increase it through her estate plan. She hopes to introduce her nieces and nephews to the process of deciding where current contributions will go, with the intention they’ll carry on the fund after her death. “When they remember me, I hope they’ll remember what I valued and what my parents valued: giving back,” she said. “That makes me happy.”

Joseph and Margery Lamonica, pictured in 1945, raised six children in DuPage County. Their daughter Kathleen Krochock honors them with the recently-opened Joseph P. and Margery E. Lamonica Family Fund.

Opening a donor-advised fund, and including the Foundation in her estate plan, is all about her parents. “It’s my gift to them and their legacy,” she said. “It’s my gift to the community they loved so much and to the following generations.” Krochock recognizes that her ability to finance this fund comes back to her parents who afforded her a wonderful career. “The inheritance I have from them is thankfully not something I need to incorporate into my daily finances,” she said. “It’s because of my parents that I don’t need to, and I could use the money to open this legacy fund instead.”

The Foundation’s Legacy Society provides a meaningful way to recognize the generosity of those who have made planned gift commitments to benefit our community and the causes they love most. The Foundation is honored to have Krochock’s trust in stewarding her planned gift.

“My parents would be proud,” Krochock concluded.
The Foundation supported DuPage County’s FORWARD initiative to increase healthy food choices and physical activity throughout DuPage County.

Personal stories from a range of Foundation constituents were recorded to create videos highlighting how the Foundation helps donors, not-for-profits, professional advisors, and our community.

In partnership with the Village of Glen Ellyn, the Foundation launched the Glen Ellyn Fund Initiative to support unique projects aimed at preserving and enhancing the quality of life throughout Glen Ellyn.

Phil Cabrera, Marilyn Gaston, and Dick Kuhn retired from the Board of Trustees.

The Foundation welcomed William Blum, Denise Horne, John Kaiser, and Dorothy O’Reilly to the Board of Trustees.


More than 250 people attended the Foundation’s Annual Benefit Bonne Soirée celebrating the arts. Nearly $350,000 was netted for Foundation operations with an additional $79,000 raised to create a permanent endowment fund for Arts DuPage.

The Foundation awarded more than $240,000 in Community Needs grants to 24 DuPage not-for-profit organizations working in the areas of Arts and Culture, Education, and the Environment.

The Foundation supported National Estate Planning Week by encouraging residents to include philanthropy in their plans.

Arts DuPage sent its first eNewsletter to 417 people and doubled its monthly recipients by year end.
Across Our Community

January 2018
The Next Generation Initiative’s inaugural Charity Trivia Night at Empire in Naperville was a success with 150 participants. Team Here-for-Phil-and-a-Trophy won bragging rights and secured a $1,500 grant for their selected charity, Bridge Communities, Inc.

February 2018
Kait Balsewicz was hired as development officer.
Arts DuPage celebrated its one-year anniversary with representatives from more than 50 local arts, philanthropic, and government entities.

March 2018
The Foundation hosted a special performance by the Chicago Symphony Orchestra at Wheaton College.
Debbie Venezia received the Lifetime Membership Award from the Naperville Art League in recognition for her outstanding contributions.
Arts DuPage hosted internationally-recognized author Wayne Breitbarth for the “Five Best Ways to Use LinkedIn to Grow Your Art Business.”

April 2018
Our 6,000th grant was awarded to Outreach Community Ministries to support its programs for at-risk students, marking $35 million in cumulative grants awarded by the Foundation!
Dave McGowan was interviewed by Sean Sebold of Sebold Capital Management for a series of videos on planned giving trends, multi-generational philanthropy, and the Tax and Jobs Act signed in 2017.

May 2018
More than 40 Trustees, committee members, and staff attended a strategic planning retreat led by David Bennett of Community Foundation Research and Training Institute.
Melissa Fischer was hired as marketing manager.

June 2018
A record-breaking $500,000 in Community Needs grants was awarded to 36 DuPage not-for-profits working in health and human services.
$270,000 in Bright & Early DuPage grants was awarded to six early childhood collaborations.
Karen Vicary was hired as office manager.
Mike Sitrick received a Board of Director’s Award from the DuPage County Bar Association in recognition for his distinguished service.
Grantmaking: Connecting Dollars with Impactful Causes

During this past fiscal year, $4.8 million was awarded from the Foundation’s more than 300 funds on behalf of our donors and community.

Our Community Needs grant program addresses critical community issues and raises the quality of life for residents. The program accepts applications in two cycles from not-for-profits serving in:

- Animal Welfare (added in 2018)
- Arts & Culture
- Education
- Environment
- Health & Human Services

Donor-Advised Fund Impact

Some grants were partially- or fully-funded from Foundation donor-advised funds upon recommendations by their fund advisors. Donor-advisors were responsible for supporting an additional $235,900 in grants, above and beyond our Community Needs budget.

In total, 91 not-for-profits applied for Community Needs grants in FY2018. By combining Community Needs funding with donor-advised fund contributions, the Foundation was able to fund 60, or 66%, of these proposed projects.

Community Needs Grant Total: $747,708

Community Needs grants are funded from earnings on permanent endowment funds established by corporations, foundations, individuals, and organizations wishing to make a lasting impact for our county:

Unrestricted Funds
- Conrad & 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
- Children and Youth Fund
- Ruth and Hugh Christ Fund
- Companions’ Fund
- Environmental Fund
- Glen Ellyn 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

“I was broken, lost, overwhelmed, scared, and I needed help. I made one phone call to Bridge Communities. That call changed my life and my four children’s lives.

With the help of multiple local organizations, our basic needs of shelter, food, and clothing were met. Eventually we found permanent housing. We received counseling. Camp for the kids was provided. Neighbors and friends helped where they could. I took financial literacy classes. Every day was hard. And it’s still hard. But my family’s situation did not define who we were.

I’m grateful to live in DuPage County where there’s a network of good people who want to help. Together we can achieve more. As giving patterns and state funding changes, having a support system for our local organizations, like the DuPage Foundation provides, is invaluable.

My life is meant to give to others. I received support from others when I needed it, so my biggest gift is to return that gift now. I do that in every way I can. Most importantly, I’m a mouthpiece for services that are available to those in need.”

- Ann Marie Andexler,
Former Client of DuPage Foundation
Grant Recipient Organizations
Community Needs Grants

Arts & Culture: $113,350

Addison Center for the Arts (Funded by JCS Fund): $3,500
To support “Arts Alive: An After School Program” for students at Indian Trail Junior High School covering the disciplines of creative writing, music, theater, and visual arts.

American Wind Band: $2,350
To support rental costs of four concert venues in an effort to expand the band’s reach throughout DuPage County.

Buffalo Theatre Ensemble: $20,000
To support operations.

Chicago Sinfonietta (Funded by JCS Fund): $15,000
To support community engagement concerts and five concerts at North Central College’s Wentz Concert Hall and Pfeiffer Hall.

DuPage County Historical Museum Foundation (Funded by History DuPage Fund): $2,500
To support two exhibits highlighting individuals who have shaped culture through architecture and athletic sports.

DuPage Symphony Orchestra: $10,000
To make symphonic orchestra concerts and educational music programs accessible to young people, families, and seniors regardless of background, age, or race.

Elmhurst Art Museum (Funded by JCS Fund): $20,000
To support “Art is for Everyone” in providing students with direct exposure to art, including creation and appreciation.

Elmhurst Symphony Association (Funded by JCS Fund): $2,500
To support the School Outreach program in bringing professional string musicians into 20 schools in and around Elmhurst.

First Folio: $5,000
To provide match funding to create a cash reserve fund.

Opera for the Young: $2,500
To support the adaptation of Dvorák’s “Rusalka” in six elementary schools, featuring a student chorus.

Salt Creek Ballet: $20,000
To support live music during Hinsdale’s performances of The Nutcracker and live musical accompaniment during ballet classes.

Senior Suburban Orchestra (Funded by JCS Fund): $2,500
To provide support for live orchestral concerts for seniors and innovative workshops for school children.

St. Andrew Lutheran Church: $2,500
To support the DuPage Multicultural Dance Troupe in teaching children and youth synchronized international dances and youth synchronized international dance.
Community Needs Grants

Education: $90,500

Alive Center: $15,000
To support the After School Drop-In program that will provide a place for students to learn, create, and be empowered in a welcoming, safe, and supervised environment.

The Community House: $10,000
To provide educational, recreational, and arts opportunities to families in the low-income/high-need Willowbrook Corner neighborhood.

Dare to Dream: Get Educated! (Funded by Betty W. Smykal, Donor-Advised Fund for Needy Children, and Perma-Seal Fund): $13,000
To support a conference focused on educating 8th-grade Latinas and their mothers about the value of higher education.

Glen Ellyn Children’s Resource Center (Funded by JCS Fund): $20,000
To support after-school and summer academic programming for low-income Glen Ellyn students at three learning sites.

I Support Community: $20,000
To support the Inside Out Club where children learn character traits through lessons on local charities and volunteer activities.

Naperville Area Humane Society: $2,500
To support Paws for Tales in providing certified volunteer dog visits to schools to help children feel more comfortable reading aloud in a non-judgmental, supportive environment.

School and Tutors on Wheels (Partially-funded by Perma-Seal Fund): $10,000
To develop a worksite-based one-on-one tutoring program for DuPage County residents with limited English proficiency to increase workplace literacy.

Environment: $37,000

The Conservation Foundation: $2,000
To support the 2018 Environmental Summit.

The Morton Arboretum: $15,000
To support STEM (Science, Technology, Education, Math) programs that enable students to experience nature, be mentored, and learn about careers in science and the environmental field.

SCARCE: $20,000
To support reusing, recycling, composting, and pollution prevention programs that will improve the air, water, and soil quality in DuPage County.
Health & Human Services: $506,858

360 Youth Services (Funded by Betty M. Bock Fund): $15,000
To provide housing and support to homeless youth ages 18-24 to help them improve their life skills, develop employment goals, and forge an educational path leading to self-sufficiency.

Action for Healthy Kids: $20,000
To help students develop lifelong healthy behaviors by implementing nutrition and physical activity programs.

Bridge Communities, Inc. (Funded by Snodgrass Family Fund): $20,000
To support the Children’s Services Program that promotes resiliency and self-sufficiency to break cycles of poverty.

Care For Cars (Funded by Betty W. Smykal and The McWethy Foundation): $10,000
To provide low-cost car repair for low-income job seekers and employees who live and work in DuPage County.

CareNet Pregnancy Services of DuPage (Funded by Betty M. Bock Fund): $7,000
To support free pregnancy tests, ultrasounds and counseling for women who experience an unplanned pregnancy.

CASA of DuPage County, Inc.: $20,000
To provide child advocacy to abused, neglected, dependent, and vulnerable children who find themselves in the court system.

Catholic Charities, Diocese of Joliet: $20,000
To provide financial support and case management to residents who are homeless or at risk of homelessness.

Community Career Center: $2,500
To educate and empower job seekers to improve their careers and quality of life.

DuPage Federation on Human Services Reform: $20,000
To help clients navigate public benefits and emergency financial assistance as well as increase providers’ ability to understand and plan for complex human services issues.

DuPage Health Coalition (Funded by DuPage Medical Group Charitable Fund): $20,000
To support the Silver Access Premium Assistance Program, helping low-income residents get insured, by paying a portion of their premiums for high-quality health insurance.

DuPagePads: $20,000
To support the Family Outreach Program that provides stabilizing services and consistent case management to end family homelessness.

DuPage Senior Citizens Council: $10,000
To support the Friendly Visits & Assistance Program that prevents senior isolation.

Easter Seals DuPage & Fox Valley: $14,778
To support the iPads for Success project that empowers children with special needs through mobile touch-device technology, helping them achieve a variety of learning and rehabilitative therapy goals.

Equine Dreams, Inc.: $20,000
To purchase a van for therapeutic miniature horse visits to individuals with special needs in area hospitals.

Family Focus (Funded by Betty M. Bock Fund): $10,000
To support Healthy Families DuPage, an evidence-based early intervention program reducing child abuse and neglect in low-income Spanish-speaking families.

Family Shelter Service: $20,000
To support emergency shelter refuge to victims of domestic violence.

Freedom Golf Association (Funded by Linda and Clark G. Carpenter Fund): $2,500
To support adaptive golf that teaches golf basics to disabled and at-risk youth.

HCS Family Services: $2,430
To purchase eight shopping carts and additional shelving for the school-based food pantry at the Anne M. Jeans School.

H.O.M.E. DuPage (Funded by Betty W. Smykal): $20,000
To provide financial literacy and one-on-one coaching to low-to-moderate income individuals and families to achieve financial self-sufficiency.

Hope’s Front Door (Funded by Louise Ingalls MacArthur Fund and Edward & Minnie Ceragioli Fund): $2,500
To purchase a computer and printer for workshops and the Pathways to Employment program.
Community Needs Grants

Health & Human Services (Continued)

Loaves & Fishes Community Services: $27,500
To support the Emergency Assistance Program and the merging of food operations and CARES client databases.

Mayslake Village (Funded by Edward & Minnie Ceragioli Fund): $5,000
To provide low-income residents with hearing, dental, and vision services for which Medicare does not pay.

NAMI DuPage: $20,000
To support peer counseling to at-risk populations, and to implement a pilot project, in collaboration with Good Samaritan Hospital, that will place peers in the Emergency Room.

Naperville Elderly Homes: $7,500
To provide rental assistance for low-income residents.

Neighborhood Food Pantries: $20,000
To support the purchase of a high-top cargo van for pick-up of recovered food from area grocery retailers.

Outreach Community Ministries Inc.: $20,000
To serve young adults at risk of chronic unemployment and equip them for meaningful work and self-sufficiency.

The Outreach House (Funded by Jim & Jan Dondlinger): $2,500
To support First Things First that will provide an additional 15,000 disposable diapers to low-income infants and toddlers.

People’s Resource Center: $12,650
To replace an aging boiler system, resolving internal temperature inconsistencies and ensuring a dignified environment for clients.

SamaraCare: $15,000
To provide fee-subsidized counseling for low-income clients on site at Loaves & Fishes Community Services.

Sharing Connections (Funded by Snodgrass Family Fund): $10,000
To provide mattresses and box springs for at-risk children who do not have beds of their own.

Special Kids Day (Funded by Andi Stelzner Fund): $6,000
To support a holiday party for families who have children with special needs.

Teen Parent Connection (Funded by Betty M. Bock Fund): $20,000
To support Adolescent Family Strengthening programs, which provide education and resources to teenage parents and their children.

Western DuPage Special Recreation Association: $14,000
To provide scholarships to adults with disabilities enabling them to participate in accessible recreational activities by attending the Rec & Roll Day Program.

World Relief DuPage (Partially funded by Betty M. Bock Fund): $10,000
To support early childhood and case management services that prepare refugee children for kindergarten.

Youth Outlook: $20,000
To support programs for LGBTQ+ youth and educate youth-serving adults to create a more welcoming, tolerant, and safe community.

YWCA Metropolitan Chicago: $20,000
To support the Project HELP Parent Mentor Program and Parent Education Workshops to increase family strength and resilience and minimize the risk of neglect.
County-Wide Arts Connections Soar in 2018

Arts DuPage, a county-wide arts council launched in 2016, was formed under the umbrella of the DuPage Foundation with funding from the JCS Fund to promote engagement and investment in the arts.

During its second year, Arts DuPage devoted significant energy to strengthening its online presence in the hopes of connecting more DuPage County residents and visitors to the vast number of arts and culture events available in the area. And connect them it did!

The comprehensive website calendar at artsdupage.org lists hundreds of upcoming events, at one point totaling more than 700! Between website traffic and social media engagement through Facebook and Instagram, thousands of people discovered plays, concerts, exhibits, tours, and classes taking place right in their backyards.

“Artists and organizations are reporting increased event attendance and attributing this upsurge to Arts DuPage, their go-to guide for all things art.”

- Debbie Venezia,
  Director of Arts DuPage
  DuPage Foundation
When Bright & Early DuPage was launched in 2012, there was only one community in DuPage County with a formal early childhood collaboration. By 2017, that same early childhood landscape had changed significantly.

Bright & Early DuPage has directly supported 10 (shown in green) of the 14 communities with active early childhood outreach systems in place. Four communities (shown in purple) receive assistance from the county-wide DuPage Early Childhood Collaborative, which receives Bright & Early DuPage funds. With your support, we hope to fund collaborations in every DuPage community to ensure all children receive the education and services that prepare them to succeed in kindergarten.

“The success that DuPage communities have had in recent grant competitions for state funds shows the power of having community collaborations focused on early childhood that are working together and continually planning for the future. These groups are ready to respond when opportunities for new funding come along. The Bright & Early DuPage investment has more than paid off! ”

-Theresa Hawley, Ph.D.
Illinois Action for Children

$2.4 M
Increase in State Grants Awarded for DuPage Early Childhood Programs

$2.4 M
Increase in State Grants Awarded for DuPage Early Childhood Programs

“...”

- Theresa Hawley, Ph.D.
Illinois Action for Children
Working Together to Improve Early Childhood Care and Education

It takes a village to prepare children for kindergarten and to launch them on the road to success, and our Bright & Early DuPage initiative is doing its part! By supporting local early childhood collaborations, we are increasing access to services, coordination of programs between agencies, and family connectivity to foster healthy development for our children. These connections are the backbone of our local collaborations’ early childhood work.

Connecting Community Partners
Collaborations engage partners from multiple sectors (schools, not-for-profits, hospitals, libraries, daycares) to build coordinated systems that provide quality early childhood education and support. Many of these partners are not intrinsically focused on early childhood issues but are learning from their partners how they too can play a key role in supporting at-risk children and families in their community.

Connecting Parents
Parents, particularly those who are low-income or have limited English skills, are often unaware of the importance of engaging their children in early childhood programs or are fearful to do so for a variety of reasons. Finding the most isolated parents through extensive outreach and establishing a comfortable rapport with them has resulted in more at-risk children connected to local resources and services.

Connecting Parents to Resources
Collaboration partners are connecting families to developmental screenings, high-quality early childhood care and education programs, home visiting services, mental health services, food pantries, libraries, and literacy programs. Without this guidance, parents are unaware that these critical early childhood development resources are available to them. This connection is vital to their child’s kindergarten readiness.

In 2018, the Foundation provided a total of $288,050 in grants to six early childhood collaborations:

Addison Early Childhood Collaboration: $50,000
Bensenville Early Learning Supporters: $50,000
CCSD 93 Birth to Five Early Childhood Collaboration: $38,050
Glenbard Early Childhood Collaborative: $50,000
Wheaton Warrenville Early Childhood Collaboration: $50,000
Willowbrook Corner Coalition (Funded by the Snodgrass Family Fund): $50,000
# Statement of Financial Position

## ASSETS

<table>
<thead>
<tr>
<th></th>
<th>2018</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash</td>
<td>$1,303,196</td>
<td>$1,863,485</td>
</tr>
<tr>
<td>Fees Receivable</td>
<td>153,973</td>
<td>132,859</td>
</tr>
<tr>
<td>Prepaid Expenses</td>
<td>41,179</td>
<td>40,289</td>
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<tr>
<td>Charitable Lead Trust Receivable</td>
<td>170,281</td>
<td>178,659</td>
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<tr>
<td>Investments</td>
<td>90,764,543</td>
<td>82,311,597</td>
</tr>
<tr>
<td>Reinsurance Contract</td>
<td>38,167</td>
<td>67,219</td>
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<tr>
<td>Pledges Receivable</td>
<td>569,629</td>
<td>1,280,164</td>
</tr>
<tr>
<td>Cash Value of Life Insurance</td>
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<td>544,015</td>
</tr>
<tr>
<td>Property and Equipment</td>
<td>1,351,362</td>
<td>1,402,894</td>
</tr>
<tr>
<td><strong>Total Assets</strong></td>
<td><strong>$94,927,711</strong></td>
<td><strong>$87,821,181</strong></td>
</tr>
</tbody>
</table>

## LIABILITIES AND NET ASSETS

### Liabilities

<table>
<thead>
<tr>
<th></th>
<th>2018</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounts Payable</td>
<td>$20,285</td>
<td>$8,739</td>
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<tr>
<td>Agency Funds</td>
<td>16,201,773</td>
<td>14,427,215</td>
</tr>
<tr>
<td>Annuity Payable</td>
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<tr>
<td>Accrued Expenses</td>
<td>58,017</td>
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<td><strong>Total Liabilities</strong></td>
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<td><strong>$14,670,707</strong></td>
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### Net Assets

<table>
<thead>
<tr>
<th></th>
<th>2018</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unrestricted</td>
<td>$7,040,248</td>
<td>$6,823,203</td>
</tr>
<tr>
<td>Temporarily Restricted</td>
<td>32,191,971</td>
<td>28,553,055</td>
</tr>
<tr>
<td>Permanently Restricted</td>
<td>39,258,482</td>
<td>37,774,216</td>
</tr>
<tr>
<td><strong>Total Net Assets</strong></td>
<td><strong>$78,490,701</strong></td>
<td><strong>$73,150,474</strong></td>
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</table>

### Total Liabilities and Net Assets

<table>
<thead>
<tr>
<th></th>
<th>2018</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>$94,927,711</strong></td>
<td><strong>$87,821,181</strong></td>
</tr>
</tbody>
</table>

---

**Pie Chart**

- **Donor-Advised**: 47%
- **Operating**: 16%
- **Agency Partner**: 17%
- **Designated**: 12%
- **Field-of-Interest**: 8%
- **Scholarship**: 4%
- **Unrestricted**: 3%

---

18 DuPage Foundation
### Statement of Activities

#### Revenue

<table>
<thead>
<tr>
<th></th>
<th>Unrestricted</th>
<th>Temporarily Restricted</th>
<th>Permanently Restricted</th>
<th>Total</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gifts, Bequests, and Grants</td>
<td>$661,457</td>
<td>$3,211,090</td>
<td>$2,075,254</td>
<td>$5,947,801</td>
<td>$21,137,341</td>
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<tr>
<td>Net Investment Gains (Losses)</td>
<td>655,068</td>
<td>3,831,808</td>
<td>-</td>
<td>4,486,876</td>
<td>5,239,226</td>
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<tr>
<td>Interest and Dividend Income</td>
<td>254,858</td>
<td>1,190,131</td>
<td>-</td>
<td>1,444,989</td>
<td>1,042,473</td>
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<tr>
<td>Fee Revenue</td>
<td>202,501</td>
<td>-</td>
<td>-</td>
<td>202,501</td>
<td>111,846</td>
</tr>
<tr>
<td>Net Assets Released from Restrictions</td>
<td>4,057,950</td>
<td>(4,057,950)</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td><strong>Total Support and Revenue</strong></td>
<td><strong>$5,831,834</strong></td>
<td><strong>$4,175,079</strong></td>
<td><strong>$2,075,254</strong></td>
<td><strong>$12,082,167</strong></td>
<td><strong>$27,530,886</strong></td>
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</tbody>
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#### Expenses

<p>| | | | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
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<th></th>
<th></th>
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</thead>
<tbody>
<tr>
<td>Grants Awarded</td>
<td>$4,819,615</td>
<td>-</td>
<td>-</td>
<td>$4,819,615</td>
<td>5,163,818</td>
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<td>Grantmaking Activities</td>
<td>1,046,772</td>
<td>-</td>
<td>-</td>
<td>1,046,772</td>
<td>853,013</td>
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<tr>
<td>Management and General</td>
<td>413,824</td>
<td>-</td>
<td>-</td>
<td>413,824</td>
<td>392,290</td>
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<tr>
<td>Fundraising</td>
<td>461,729</td>
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<td>-</td>
<td>461,729</td>
<td>443,194</td>
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<tr>
<td><strong>Total Expenses</strong></td>
<td><strong>$6,741,940</strong></td>
<td>-</td>
<td>-</td>
<td><strong>$6,741,940</strong></td>
<td><strong>6,852,315</strong></td>
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</tbody>
</table>

#### Assets - Before donor-approved changes

<p>| | | | | | |</p>
<table>
<thead>
<tr>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td>Donor-Approved Changes in Restrictions</td>
<td>$ (910,106)</td>
<td>$4,175,079</td>
<td>$2,075,254</td>
<td>$5,340,227</td>
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<tr>
<td><strong>Increase (Decrease) in Net Assets</strong></td>
<td><strong>$217,045</strong></td>
<td><strong>$3,638,916</strong></td>
<td><strong>$1,484,266</strong></td>
<td><strong>$5,340,227</strong></td>
<td><strong>$20,678,571</strong></td>
</tr>
<tr>
<td>Net Assets - Beginning of Year</td>
<td><strong>$6,823,203</strong></td>
<td><strong>$28,553,055</strong></td>
<td><strong>$37,774,216</strong></td>
<td><strong>$73,150,474</strong></td>
<td><strong>$52,471,903</strong></td>
</tr>
<tr>
<td>Net Assets - End of Year</td>
<td><strong>$7,040,248</strong></td>
<td><strong>$32,191,971</strong></td>
<td><strong>$39,258,482</strong></td>
<td><strong>$78,490,701</strong></td>
<td><strong>$73,150,474</strong></td>
</tr>
</tbody>
</table>

#### Assets

<table>
<thead>
<tr>
<th></th>
<th>FY14</th>
<th>FY15</th>
<th>FY16</th>
<th>FY17</th>
<th>FY18</th>
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</thead>
<tbody>
<tr>
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<td>FY15</td>
<td>$62,815,765</td>
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<td>FY16</td>
<td>$64,455,964</td>
<td></td>
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<tr>
<td>FY17</td>
<td>$87,821,181</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>FY18</td>
<td>$94,927,711</td>
<td></td>
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</tbody>
</table>

#### Contributions

<table>
<thead>
<tr>
<th></th>
<th>FY14</th>
<th>FY15</th>
<th>FY16</th>
<th>FY17</th>
<th>FY18</th>
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</thead>
<tbody>
<tr>
<td>FY14</td>
<td>$9,090,740</td>
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<tr>
<td>FY15</td>
<td>$6,810,927</td>
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<tr>
<td>FY16</td>
<td>$7,320,162</td>
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</tr>
<tr>
<td>FY17</td>
<td>$21,137,341</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>FY18</td>
<td>$5,947,801</td>
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<td></td>
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</tbody>
</table>

#### Grants

<table>
<thead>
<tr>
<th></th>
<th>FY14</th>
<th>FY15</th>
<th>FY16</th>
<th>FY17</th>
<th>FY18</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY14</td>
<td>$3,095,458</td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>FY15</td>
<td>$3,598,673</td>
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<tr>
<td>FY16</td>
<td>$3,672,065</td>
<td></td>
<td></td>
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<td></td>
</tr>
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<td>FY18</td>
<td>$4,819,615</td>
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</tr>
</tbody>
</table>

The fiscal year 2018 audit for the DuPage Foundation was performed by Plante Moran PLLC. These summarized financial statements are condensed from the audited statements, which are available at dupagefoundation.org.
Katelyn & Devon Moon Establish a Multi-Generational Giving Trend

With two-year-old son DJ, and another baby on the way, Katelyn and Devon Moon are committed to raising their family as philanthropists. “I want them to know early on that it’s important to give and actively participate as community members,” Katelyn said. “As parents, we plan to lead by example.”

Born and raised in Naperville, the Moons’ DuPage County roots are deep. After attending Southern Illinois University, they returned home to continue their life together. “Naperville’s social resources are incredible,” Devon explained. “Residents are willing to come together and help others; that’s one of the reasons we love it and chose to raise our family here.”

Service to others played a role in their lives growing up, and as adults, remains important to the Moons. Both became active members of the Foundation’s Next Generation Initiative (NGI) in 2017 after Devon attended a DuPage County Estate Planning Council meeting sponsored by the DuPage Foundation. “I won a raffle and got to select an organization of my choice to receive $1,000,” said Devon. “That was an excellent way to increase awareness for what the Foundation is all about.” Mike Sitrick introduced Devon to NGI and since joining, the Moons have recruited new members, given to featured not-for-profits, and attended social events and volunteer opportunities offered.

“The DuPage Foundation is a facilitator,” Devon continued. “It serves the important function of knowing which issues our community is facing and connecting individuals, organizations, and dollars with those issues.” For a more hands-on perspective, the Moons are involved directly with individual charities. They engage with and volunteer for multiple organizations including DuPage PADS, Little Friends, Suburban Chicago Planned Giving Council, and West Suburban Philanthropic Network.

In addition to personal giving through NGI, serving on planning committees, and attending events, their careers have intersected with Foundation partnerships as well. Katelyn is the Manager of Communications & Administration of The Driskill Foundation, a grantmaking organization that facilitates innovative programs that encourage curiosity for young learners. The Driskill Foundation is supporting the Foundation’s 2018 Imagination Ball. Devon is the Marketing Manager of Sebold Capital Wealth Management, a shared family-office style firm that places emphasis on intelligent charitable planning.

Katelyn and Devon hope their children will continue their giving trend by cultivating their own relationships with philanthropy. “You never know what someone else is struggling with,” Katelyn said. “We hope they learn about others’ needs, and then help however they can. We hope they’ll find causes that matter to them.” She thinks of the DuPage Foundation as her catalog of giving opportunities and will continue to utilize the Foundation as a resource moving forward. “You’re in touch with so many organizations,” she said. “I can call you for guidance.”

In addition to being a resource for individuals looking to give back, Devon stressed the Foundation’s resourcefulness to other charities as well. “If you’re struggling with staffing, organizational development, funding, whatever, the Foundation can assist as an expert resource in these areas,” Devon explained.

Both Katelyn and Devon plan to continue their involvement with NGI and the DuPage Foundation. By pairing volunteers like themselves with Foundation leadership, the Moons are confident in our ability to make a difference across DuPage County. “We’re proud to be part of an organization that connects the right resources to the right needs at the right time,” Katelyn concluded.

“Whichever cause or community you care about, get involved with it. Do something for somebody else, and see how it feels. Try it on for a minute; I think you’ll be glad you did.”

- Devon Moon
NEXT GENERATION INITIATIVE

Empowering our county’s next generation of philanthropic leaders by providing them with the chance to connect, learn, and give back. Join us for social events, organization meet and greets, and volunteer opportunities!

$20,730
TOTAL DOLLARS RAISED IN FY18

$9,135
TOTAL GRANTED IN FY18

- Bridge Communities, Inc.
- Family Shelter Service
- Linden Oaks Behavioral Health
- Ronald McDonald House Charities
- Western DuPage Special Recreation Association
- World Relief DuPage

136
VOLUNTEER HOURS SERVED IN FY18

- Organizing the food pantry
- Making stress blankets
- Baking cookies for children battling severe illness
- Washing windows
- Community cookout for at-risk kids

“So many people I talk to want to make a philanthropic impact in DuPage but don’t know how. For myself and my family, I have found no better way to learn about the opportunities than by working with the Foundation. I truly feel what I’ve supported through NGI is making an impact in the county.”

- Brendan Connolly, NGI Steering Committee Chair
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Aurora
The Gierach Law Firm

Vice Chair
Ernest J. Mrozek
Hinsdale
St. Rita High School

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Joseph L. Weidenbach
Naperville
U.S. Bank

Treasurer
Charles B. McKenna
Wheaton
Crowe Horwath, LLP (Retired)

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Hinsdale
Capital Group

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Glen Ellyn
Aon Benfield
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Members as of June 30, 2018.

Fiscal Year 2018 Committees

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Dorothy O’Reilly+
Norman Beles
Barry Horek
John Kaiser, Jr.

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Betsy Brosnan^  
Christopher Janc  
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Dorothy O’Reilly+
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William Blum
Patricia deRosset
Christine Fenne
Katelyn Moon
Tamara Ortegel
Peter Paolilli
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Erin Cetera
Patti Gustafson
Theresa Hawley
Janet Hodge
Andrew Johnson
Peter Noronha
Marcia Tomnare
Nathaniel Wasson
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Denise Horne
John Kaiser, Jr.
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Matthew Booth
Donald Fischer
Adam Hill
John Kaiser, Jr.
Laurie McMahon
Eugene Ognibene
Steven Shebik

Grant
Joseph Weidenbach^  
Megan Shebik+
Ruth Carlson
Lamounte Coleman
Deborah du Vair
Dianne Engram
Supriya Jasuja
Andrew Johnson
Mary Kay Kluge
Gerald Lewis
Roger McDougal
Laurie Reifel

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Patricia deRosset
Michael Havaia
Timothy Jensen
Daniel Maguire
Charles McKenna
Ernest Mrozek
Kevin Phillips
James Snodgrass
Braden Waverley

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Jim Myers^  
Matthew Biespiel
Anna Clarke
Dusty Holoubek
Joyce Hothan
Joyce Webb

Next Generation Initiative
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Karen Fleming+
Adam Brigham-Althoff
J. Amber Drew
Timothy Fitzgerald
Dusty Holoubek
Derek Johnson
Henry Kaskov
Megan Lynch
Juliana Maller
Katie Michel
Devon Moon
Michael Morrissey
Tamara Ortegel
Amit Thaker

Professional Advisor
Delrose Koch^  
Neil Goltermann+
Denise Gierach
William Hassett
Nancy Hermann
Karl Maurer
Brien Nagle
Alice Wood

Strategic Planning
William Kennedy^  
Ernest Mrozek+
Stephen Burt
Deborah du Vair
Denise Gierach
Charles McKenna
Joan Morrissey
Jim Myers
Joseph Weidenbach

Trustees Emeriti

It’s easy to donate to the DuPage Foundation.
Visit dupagefoundation.org.

2018 Annual Report  23
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.