

Fiscal Year 2019
Annual Report



Building a Foundation for the Future

DuPage
Foundation 

From July 1, 2018 - June 30, 2019:

Contributions Received

Grants Awarded

Assets Under Management

\$7.0 M

\$6.8 M

\$98.9 M



What's Inside

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Letter from Our Chair & President

Dear Friends,

The fiscal year ending June 30, 2019 was a big year for the DuPage Foundation, granting nearly \$6.8 million to strengthen our community and the causes that matter most to you. Our Community Needs grant program supported area not-for-profits, helping them meet the unique needs of their clients. Our first annual Arts DuPage Month highlighted the many arts activities available throughout our county. And our Bright & Early DuPage initiative supported thousands of children and their families, significantly improving their chances of succeeding in kindergarten.

This impact was made possible by steady asset growth, including the addition of 18 new funds, more than \$7 million in contributions, and 11 new Legacy Society members, a special circle of nearly 170 Foundation friends, whose commitments represent tens of millions of dollars in pledged estate gifts.

We spent much of the year determining how we can become even more effective in meeting the needs of our community and partners. Through a robust strategic planning initiative, we connected with hundreds of constituents, engaged consultants, and held internal discussions about how to best enhance our services and increase our impact as DuPage County's philanthropic leader.

In October 2018, our Board unanimously approved an exciting five-year strategic plan with an ambitious goal to double community impact. In the pages that follow, we illustrate our plan's priority areas. We will continue to support the great work of our area not-for-profits, be our community's champion for charitable giving, and grow our partnerships to address critical areas of need.

We invite you to join us in our efforts to build a foundation for the future—a Foundation that fosters philanthropy, connects donors to area needs, and builds community partnerships.

Thank you for all you have done to make this another great year. We appreciate your continued support and look forward to the impact we will achieve together in the years ahead!

Sincerely,

Denice



Denice A. Gierach
Board Chair
FY16 - FY19

Dave



David M. McGowan, CFRE
President & CEO

Foundation Staff



Kaitlyn M. Balsewicz, CFRE
Development Officer
Winfield



Laura R. Ernst
Program Associate
Lisle



Melissa C. Fischer
Marketing Manager
Lemont



Matti F.D. Oshin
Marketing Intern
Addison



Michael R. Sitrick, JD, CFRE
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
Elmhurst



David A. Weisz
Vice President for Finance
Carol Stream



Matt S. Wilson
Accounting Associate
Westchester



STRATEGIC PLAN

OUR IMPACT

Strategic Grantmaking

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

Through our grantmaking and leadership initiatives, we will become even more strategic in addressing our community's most pressing needs. In particular, we will focus on expanding the breadth and impact of our Community Needs grant program and lead initiatives—Bright & Early DuPage, and Arts DuPage.

Our top priority over the next five years is to become the leader in effectively responding to the unmet needs of DuPage County residents. “We will research and revise focus areas for our Community Needs grant program to ensure we are directing maximum funds to current and emerging critical issues,” said Barb Szczepaniak, vice president for programs. “We will also educate our donors and community partners to engage them in our work and expand our support.”

With Bright & Early DuPage funding, seven local early childhood collaborations are actively expanding the resources available to help young children and families. We will continue to foster the collective growth of these collaborations, as well as new ones, to increase the number of publicly-funded early childhood seats that are available in DuPage County, moving toward the goal that all children have the resources they need to be ready for kindergarten and succeed in school and beyond.

Additionally, we will actively seek funding for our Arts DuPage endowment to secure its long-term sustainability. Our goal is to ensure creative opportunities are supported throughout our community for years to come.

2020 - 2024

OUR CAPACITY Endowment Growth

Expand our role as DuPage County's philanthropic leader.

As DuPage County's most comprehensive grant maker, our residents and not-for-profit partners look to the DuPage Foundation to champion charitable giving and lead in building an area-wide culture of collective, coordinated impact. Over the next five years, we will seek to grow our assets in order to expand our impact and role as DuPage County's philanthropic leader.

To achieve this goal will require significant charitable capital and our community's full engagement in our vision. As such, we will focus on: 1) working to build the capacity and breadth of our endowments, programs, and initiatives; 2) improving our services to our donors, not-for-profits, and other partners to become DuPage's premier charitable resource; and 3) actively educating and involving community leaders, area businesses, and our network of professional advisors in our mission and efforts to raise the quality of life throughout the county.

"Philanthropy is already deeply ingrained in the hearts of our residents," said Mike Sitrick, vice president for advancement. "You can see it at work throughout each of our municipalities—it's what makes DuPage County special. Our aim is to harness that energy and passion on a county-wide level and focus it to do even more good for our community and the not-for-profits serving us."



A woman with blonde hair, wearing a bright yellow sleeveless dress and a necklace, stands in a modern interior space. She is positioned on the left side of the frame, looking towards the camera. The background features large windows and colorful, translucent glass partitions in shades of purple, pink, yellow, and green. The floor is dark and reflective. The overall atmosphere is bright and contemporary.

STRATEGIC PLAN

OUR VOICE

Community Engagement

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

With the tremendous amount of good that we are accomplishing, the DuPage Foundation's story can sometimes be difficult to focus. "As our county's philanthropic leader, we're experts in a myriad of ways," said Melissa Fischer, marketing manager. "We're experts on charitable giving strategies; we're familiar with the needs our neighbors are struggling with; we know the organizations that are providing the most impactful solutions for our residents; and we're committed to helping our donors and partners achieve their goals. That's a lot to communicate to our constituents and to those unfamiliar with our services."

To engage more people and organizations in our vision to raise the quality of life throughout DuPage County, we will enhance our storytelling and focus our messages more clearly for different audiences. You will begin to see that much of our work is tied to local data about DuPage needs and you will receive timely updates on charitable giving strategies and opportunities that are available to you. Most importantly, we will feature compelling stories about our donors, grantees, professional advisors, and other community partners who have been transformed by their engagement with us.

"We no longer want to be the 'best-kept secret' in DuPage County," said Fischer. "We want to deepen our community's understanding that there is an opportunity for us all to do a world of good, right here in our own backyard." And the Foundation is here to help you do that.

A woman with dark hair, wearing a black top, is smiling broadly while talking on a black telephone. She is in an office environment with shelves and a flag visible in the background.

2020 - 2024

OUR HOUSE

Organizational Development

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

The effectiveness of the systems and resources that an organization has in place are vital to its growth and success. This is true for the DuPage Foundation, too. From the expertise of staff and those in leadership roles to the technology utilized for grant applications, audience communications, and donor services, each element is critical to achieve maximum impact. By enhancing these areas, we will ensure our foundational structure is strong and positioned to support our donors, partners, and community for years to come.

We will continue to expand the development, training, and diversity of our board and other volunteer leaders to ensure we are governed prudently in accordance with the needs and interests of our county. We will improve our information technology systems by consolidating current software into an integrated platform to enhance services to our constituents and provide greater efficiencies to our staff. We will analyze personnel and facilities needs to ensure our staffing and space are commensurate with our expected growth. Additionally, we will review our compensation and benefits to allow the Foundation to recruit and retain top talent.

“Investing in foundational components of an organization makes the work we do possible,” said David Weisz, vice president for finance. “By aligning strategy, individuals, and processes, we can provide the best stewardship of our charitable assets, the highest level of service for our donors, and the greatest impact toward our community’s needs.”

Why I Give: Donor Story



A Commitment to Multi-Generational Giving: The Beck Family

The Beck family, from left to right: John, Jennifer, Erin, Margie, Karl, Marty, and Kelly.

“Live fun, do good” is the personal motto of **Margie Beck**. “It fits our family,” Margie said. “We get along, we have fun together, and we give charitably.”

The family that Margie speaks of is herself, her husband **Marty**, and their four children and one son-in-law—**Erin**, (31), **Jennifer** (28) and **John** (30), **Kelly** (26), and **Karl** (23). Giving to charity wasn’t something that Marty or Margie grew up doing regularly, but they’ve made a commitment to it as adults and have encouraged their children to get involved, too. “We knew our children were watching us, and that they’d mimic our actions,” said Marty. “So if we’re having fun and doing good, they’ll do the same. That’s what we wanted.”

Residents of Naperville for the last 25 years, the Becks were drawn to the community’s commitment to education and family values. The Becks had been adding to a personal account designated for charitable giving and were casually aware of the DuPage Foundation’s

services. “We finally made the commitment to move our charitable giving fund to an organized donor-advised fund at the DuPage Foundation,” said Marty. “The Foundation is a trusted partner that is helping us achieve what we want with our giving—it’s a tremendous confidence builder to have the Foundation’s expertise on our side.”

Doing due diligence about the organizations they support is important to the Beck family. Each of their children is allotted an amount of money from which to recommend a grant. Part of the children’s responsibility is to review the finances of the charitable organization they select. “We look for programs that operate efficiently so the maximum amount of the grant goes to those in need.” said Margie.

When the **Beck Family Foundation** makes a donation, those in need receive a tangible benefit. But these grantees aren’t the only recipients of something.

“Our family gets the amazing feeling of doing good,” said Margie. “Giving to others is an uplifting experience that Marty and I want our children to turn to throughout their lives.”

As a financial planner, Marty is confident with the selection of a donor-advised fund as a giving vehicle, which ensures that the growth of the fund is significantly more tax efficient than a personal account. “With the DuPage Foundation as our partner, we have made more money available for the fun part—the giving!”

Marty and Margie are committed to philanthropy and hope their children will continue following in their footsteps. “Taking our children with us on this journey is the first step to ensuring that the DuPage Foundation will be able to respond to the needs of our community for generations to come.”

Living fun and doing good is a legacy worth leaving.

Why I Give: Donor Story



Giving From the Heart: Dr. Asok K. Ray

*Dr. Asok K. Ray and his daughter,
Mallika.*

The story of philanthropist **Dr. Asok K. Ray** began from humble beginnings in Calcutta, India. He earned his medical degree from Calcutta University in 1968, followed by surgical training in the United Kingdom, fellowships in Scotland and the United States, and a tenure as chief resident of Cook County Hospital, before entering private practice to serve patients at MacNeal Hospital and Loyola University Medical Center.

“Helping people has always been my passion,” said Dr. Ray. “It is why I chose a career in medicine, and why I believe so strongly in philanthropy. After working very hard to establish myself, I started giving to charity in 1981 by supporting Mother Teresa’s work.”

With Mother Teresa as inspiration, Dr. Ray continued giving to many causes she led and established his own charitable foundation, the **Indima Foundation**, to help the poor of India. Founded in 1992 in memory of his late parents, **Indira and Manik Lal Ray**, the Indima Foundation has addressed needs throughout India and beyond,

including the construction of medical facilities and support for underprivileged students and disadvantaged youth.

“My father was a very hard worker and my mother was extremely generous and would always help the less fortunate,” said Dr. Ray. “They instilled their values in me, and I know they would be proud of the work I have done to help the indigent.”

Over the years, the scope of Dr. Ray’s philanthropy has expanded to those in other corners of the world—including here in Illinois. Suburban-based organizations like Helping Hand Center and the Blind Foundation for India have been among the many local beneficiaries of the Indima Foundation.

While continuing to give through the Indima Foundation, Dr. Ray recently opened a donor-advised fund at the DuPage Foundation to supplement his giving and ensure that he and his family have a knowledgeable partner to help preserve the charitable legacy he created. “I’ve been impressed with the work of the DuPage

Foundation for a long time,” said Dr. Ray. “I now have a trusted partner committed to honoring my intentions who can help my family identify impactful opportunities.”

Recognizing the importance of passing on his charitable values, Dr. Ray involves his daughter, **Mallika**, in his philanthropy. “I want Mallika and my grandchildren to continue addressing poverty and hunger for people of all backgrounds and religions. I also hope that my commitment will inspire my brothers and sisters within our communities to give locally and toward the causes they love.”

Of his own legacy, Dr. Ray said: “Amassing wealth is not my personal idea of happiness. True happiness comes from helping others, particularly those who are in need. Through my giving, I hope to engage more of the ‘haves’ in serving the needs of the ‘have-nots’ of the world. With the DuPage Foundation as my partner, I know that my family and I will succeed in supporting many life-changing solutions.”

Ways to Give

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 to donate life insurance 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 any required premium. Under this arrangement, the Foundation would pay the annual premium.

Retirement Plans and Qualified Charitable Distributions (QCDs)

Donors can make contributions from an IRA or other retirement assets such as a 401(k), Keogh, or 403(b). Donors 70 ½ or older can also make tax-free Qualified Charitable Distributions (QCDs) of up to \$100,000 per individual or \$200,000 per married couple from their traditional IRAs to satisfy their Required Minimum Distributions (RMDs) while lowering their Adjusted Gross Income. Distributions to any Foundation fund except donor-advised funds will qualify, but must be made directly from the donor's IRA account.

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 the asset was 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.



Foundation Grant Committee member Dianne Engram with Lucy Tarabour and Debbie Fulks of DuPage Sponsors.

The Impact of Our Grantmaking

In FY19, nearly \$6.8 million was awarded from the Foundation's more than 300 funds on behalf of our donors and community.

DuPage Foundation grants come in different forms. Some are awarded through our competitive Community Needs grant application process, while others reflect donors' recommendations, or support designated organizations based on their passions.

In FY19, donor-advisors recommended \$5.5 million to not-for-profits of their choosing to enhance the quality of life through the hands-on work of local and national organizations. Through the Community Needs grant program, local not-for-profits received grants totaling more than \$790,000 to address critical issues in DuPage County.

A generous estate gift from long-time Glen Ellyn resident Ron Bork established a fund wholly-focused on animal welfare projects. The nearly \$1 million gift is being distributed over five years with 50% of annual grants supporting Willowbrook Wildlife Center and 50% benefiting other local agencies. The first grant cycle in 2019 focused on transportation-related projects, awarding a total of \$94,750 to support the purchase of vehicles and maintenance expenses for four organizations.

Our Emergency Fund provides a way for the Foundation and our donors to act immediately in times of crisis. When the Evangelical Child and Family Agency's Wheaton building experienced a fire in 2018, a \$5,000 grant from the Foundation was used as a match to garner additional donations. More than \$12,000 was raised to repair the damages.

Through a grant from the JCS Arts, Health and Education Fund, WTTW News is expanding its *Chicago Tonight* arts coverage with an endowed, full-time arts correspondent. The arts correspondent produces exclusive on-air and digital content, covering the gamut of Chicago's rich and diverse arts scene.

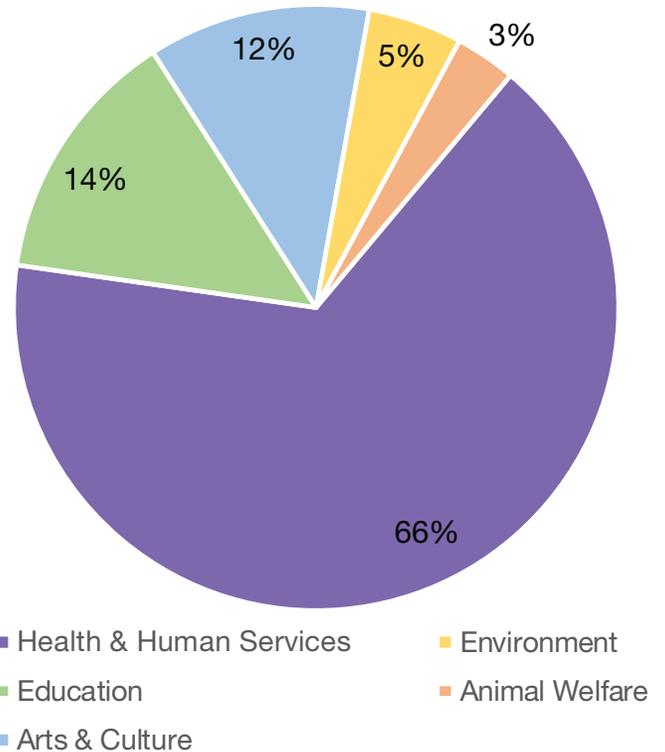
Award events connected donors with grant recipients, sparking new, unexpected opportunities. After the Perma-Seal Fund partially funded Literacy DuPage's tutoring program for non-English speaking adults, Perma-Seal explored the possibility of a future partnership with Literacy DuPage's work-based literacy program.



Community Needs Grant Program

Community Needs FY19 Grant Total: \$792,155

As the Foundation’s flagship grant program, the Community Needs grant program supports the great work of local organizations that are addressing critical issues throughout DuPage County. The grant process also serves as a research and development tool for the Foundation, as we learn about and track the effectiveness of services offered in various issue areas. This helps us connect local donors, who seek our guidance, to the organizations doing work that aligns with their interests.



In FY19, the Community Needs grant program funded applications supporting:

- | Health & Human Services | Education | Arts & Culture | Environment | Animal Welfare |
|---|---|--|--|---|
| <ul style="list-style-type: none"> Behavioral health Disability services Emergency assistance Food pantries Homeless prevention Senior services | <ul style="list-style-type: none"> After-school programs Literacy tutoring Nutrition/health education Youth education | <ul style="list-style-type: none"> Arts participation Senior outreach Youth art education | <ul style="list-style-type: none"> Conservation Environmental education Habitat restoration | <ul style="list-style-type: none"> Pet care during temporary crises Rescue dog training for veterans Veterinary care for cats and dogs |

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
- John J. Bryant Fund
- Children and Youth Fund
- Ruth and Hugh Christ Fund
- Companions’ Fund
- Environmental Fund
- Glen Ellyn Fund

- Health Fund
- Martha McCormick Hunt Fund
- The John and Elsie, Mary and Arthur Kolar Fund
- Wesley E. Luehring Foundation Fund
- Abigail Catherine Mueller Children’s Fund
- Douglas A. Schooley Memorial Fund
- Sindelar Family Fund
- Donald and Dianne Skeet Fund

In total, 119 not-for-profits applied for Community Needs grants in FY19. By combining Community Needs funding with donor-advised fund grant recommendations, the Foundation funded 57% of the proposed projects, for a total of \$792,155 in grants. See dupagefoundation.org for complete program descriptions.

Health & Human Services Total: \$523,880

- 360 Youth Services: \$15,000
- Bridge Communities, Inc.: \$20,000
- Care for Cars: \$10,000
- CASA of DuPage County, Inc.: \$20,000
- Catholic Charities, Diocese of Joliet: \$20,000
- Chicago Dental Society Foundation: \$15,000
- Community Adult Day Center: \$2,880
- Donka, Inc.: \$7,500
- DuPage Federation on Human Services Reform: \$20,000
- DuPage Health Coalition: \$20,000
- DuPage Senior Citizens Council: \$10,000
- DuPage Sponsors: \$2,500
- DuPagePads: \$20,000
- Easter Seals DuPage & Fox Valley: \$10,000
- Elmhurst Walk-in Assistance Network: \$10,000
- Evangelical Child & Family Agency: \$7,500
- Friends for Therapeutic Equine Activities: \$15,000
- H.O.M.E. DuPage: \$20,000
- HCS Family Services: \$2,500
- Healthcare Alternative Systems: \$5,000
- Hope's Front Door: \$2,000
- Loaves & Fishes Community Services: \$28,000
- Mayslake Village: \$5,000
- Metropolitan Family Services DuPage: \$20,000
- Neighborhood Food Pantries: \$20,000
- Northeast DuPage Family and Youth Services: \$20,000
- Northeast DuPage Special Recreation Association: \$20,000
- Northern Illinois Food Bank: \$20,000
- Riverwalk Adult Day Services: \$10,000
- SamaraCare: \$20,000
- Serenity House Counseling Services: \$2,500
- Sharing Connections: \$20,000
- Special Kids Day: \$6,000
- Teen Parent Connection: \$20,000
- Wayne/Winfield Area Youth/Family Service: \$2,500
- World Relief DuPage: \$15,000
- Youth Outlook: \$20,000
- YWCA Metropolitan Chicago: \$20,000

Education Total: \$108,500

- Alive Center NFP: \$10,000
- Community House: \$10,000
- Dare to Dream: Get Educated!: \$8,500
- DuPage Children's Museum: \$10,000
- The GardenWorks Project: \$2,500
- Glen Ellyn Children's Resource Center: \$15,000
- KidsMatter: \$20,000
- Literacy DuPage: \$20,000
- North Central College: \$2,500
- Robert Crown Center for Health Education: \$10,000

Arts & Culture Total: \$94,100

- Century Walk Corporation: \$20,000
- Chicago Sinfonietta: \$15,000
- ClaySpace: \$2,500
- College of DuPage Foundation: \$16,000
- DuPage Art League: \$9,100
- DuPage County Historical Museum Foundation: \$2,500
- DuPage Symphony Orchestra: \$10,000
- Elmhurst Choral Union: \$2,500
- Glen Ellyn-Wheaton Chorale: \$2,000
- Paramount Arts Centre: \$4,500
- Senior Suburban Orchestra: \$2,500
- St. Andrew Lutheran Church: \$2,500
- Storycatchers Theatre: \$2,500
- Young Naperville Singers: \$2,500

Environment Total: \$40,000

- Conservation Foundation: \$14,000
- Fermlab Natural Areas: \$12,000
- SCARCE: \$14,000

Animal Welfare Total: \$25,675

- A.D.O.P.T. Pet Shelter: \$7,500
- Naperville Area Humane Society: \$10,675
- West Suburban Humane Society: \$7,500



Our sincere thanks to the donors and donor-advised fund representatives who recommended grants totaling \$231,580 to support FY19 Community Needs.

- Betty M. Bock Fund
- Edward & Minnie Ceragioli Fund
- Donor-Advised Fund for Needy Children
- History DuPage Fund
- JCS Arts, Health and Education Fund
- Robert and Laurie McMahon Family Fund
- The McWethy Family Foundation
- Perma-Seal Fund
- Shebik Family Fund for Basic Human Needs
- Betty W. Smykal
- Snodgrass Family Fund
- Andi Stelzner Fund
- Mary Eleanor and James M. Wall Fund

The Impact of Our Initiatives:



Through Bright & Early DuPage, the DuPage Foundation is changing the landscape of early childhood throughout DuPage County. The system has evolved into a collaborative network of partners working to ensure that all children in DuPage are ready to succeed when they enter kindergarten. The DuPage Foundation's financial support and leadership have been key factors in breaking down the silos that were impeding true progress in the early childhood environment.

Collective Early Childhood "Wins" In FY19:

396 MORE CHILDREN

whose families have limited financial resources, now spend their day in publicly-funded, high-quality early childhood programs.



345 FAMILIES

now receive home visiting services by a trained professional to assist in providing a safe and supportive environment for their children.



1,632 CHILDREN

were screened for developmental delays.



580 OF THOSE SCREENED

were referred for early intervention, with the hope of reducing the need for specialized instructional support during their school years.



ORGANIZING LEADERS

"We worked with local schools and the Cooperative Association for Special Education to implement Glenbard Parents as Teachers, an evidence-based program serving parents and families with children ages birth to three living in Glendale Heights, Glen Ellyn, and Lombard. The funding we received from the State of Illinois to implement the program allowed us to serve 110 new families. Working as a collaborative—an efficient, organized group of early childhood leaders—was the key factor in our receipt of this funding, and that collaboration exists because of Bright & Early DuPage."

- Jeanine Woltman, Glenbard Early Childhood Collaborative

LEVERAGING FUNDS

"Our growing partnerships have leveraged more than \$1 million annually in state and federal grants to support high-quality, publicly-funded early childhood programs, such as Preschool for All, Prevention Initiative, and HeadStart. Responsible use of these funds encourages continued receipt of them, which means we can serve more children and families, connecting them to critical resources for which they are eligible."

- Christy Poli, Bensenville Early Learning Supporters

CONNECTING COMMUNITY PARTNERS

"Our partnership with Northwestern Medicine and DuPage Medical Group educates pediatricians and medical personnel about early childhood community partnerships, screenings, and parent education. Through face-to-face meetings, and a one-year commitment from Northwestern Medicine to participate on our coalition, we receive a medical expert's voice and can better serve our families. Quarterly, we'll further educate pediatricians in their wide network about the benefits our families reap from collaboration between early childhood and medical professionals."

- Michelle Scharinger,
CCSD93 Birth to 5 Community Collaboration



STRENGTHENING PARENT RELATIONS

“Through a series of informational parent breakfasts held while kindergarteners attended summer camp, important relationships were developed. More than 125 parents learned tips to working with the school system, how to support their children’s learning, and the best ways to advocate for their children during the course of their education. Establishing trusted relationships with parents early on promotes easy access to needed resources in the future.”
 - Mary Haley, Addison Early Childhood Collaborative

STANDARDIZING OUTCOMES

“We researched and adopted the Ready Child Equation as a unified approach to kindergarten readiness across DuPage County. A defined approach ensures all early childhood collaboratives and partners are collectively focused on the same positive outcomes. We’re strengthening partnerships with our health systems, K-12 schools, early care and education providers, community members, and parents with the same goals in mind, which is more efficient, more economically beneficial and more impactful.”
 - Fakelia Guyton, DuPage County Early Childhood Collaboration



INCREASING HIGH-QUALITY EDUCATION SEATS

“Community Unit School District 200 and Metropolitan Family Services added a new early childhood classroom for 3- to 5-year-old children with significant needs. Collaboration members were instrumental in securing space for 19 children, previously on a waitlist, to a high-quality early childhood education program. Finding appropriate space for new classrooms in our community has long been a struggle, so we’re thrilled to see this opportunity come to fruition because of our collaborative efforts. We also added 60 new home-visiting spots for 0-3 year olds.”
 - Elise Schram, Wheaton/Warrenville Early Childhood Collaboration



RAISING AWARENESS

“Our coalition is bringing attention to issues and challenges experienced by the residents of the unincorporated Willowbrook Corner community, such as violence, drug use, lack of transportation, and poor living conditions. These challenges are having a direct impact on family well-being and student school readiness. There have been many efforts in the past to strengthen this community; however we’ve determined a systems-level approach is required, providing residents a voice at the table and supporting residents as leaders in this work. We are grateful for the partnership and dedication of CCSD #180 and the DuPage Foundation for supporting this life-changing work.”
 - Marianne Pokorny, Willowbrook Corner Coalition



The Impact of Our Initiatives:



Arts DuPage is a community connector that supports, promotes, and advocates for the arts throughout DuPage County. Our comprehensive online resource, artsdupage.org, continues to grow as the go-to events guide for more than 42,000 users. The inaugural Arts DuPage Month celebration

in October of 2018 highlighted the region's rich artistic landscape and boosted participation in events hosted by more than 60 local organizations.

"When in need of an art instructor, Arts DuPage connected us to the perfect match! The artist completed the program and continued bi-weekly classes for our clients. It reminds me of Helen Keller:

Alone we can do so little; together we can do so much."

- Marian Stricker,
Riverwalk Adult
Day Services

"Arts DuPage builds esprit de corps among local presenters, galleries, and artists. We are blessed to have Arts DuPage leading a **renaissance of the arts** in our community, and **I'm all in!**"

- Tony Payne, Wheaton College
Artist Series

"A grant from the JCS Fund of the DuPage Foundation supported a mixed media art project that impacted our community in ways we didn't anticipate. The process of creating incredible art, by engineers, gardeners, chefs, students, factory workers, grandparents, writers, and teachers, forged new friendships, **bringing our community together across age, social, and ethnic boundaries.** That's what art has the power to do—and we commend Arts DuPage for encouraging creative opportunities around us."

- Frank DeSimone,
Village of Bensenville

"Arts DuPage connected our music writing program with Elmhurst College and worked tirelessly as our advocate to pave the way for an expansion of this program to other area colleges. **A real-life musical success story and a win-win for all!**"

- Larry Collins, Acapellago

"What's become more evident to me in the last year are the relationships that have developed or deepened within our arts community. The MAC's recent collaboration with the Mexican Cultural Center in West Chicago is an Arts DuPage-inspired connection. **Arts DuPage is the conduit driving an increased camaraderie and communication** between the arts and DuPage County residents."

-Diana Martinez, McAninch
Arts Center

"**We're committed to raising the profile of the local arts scene** through artsdupage.org and social media, so we launched a storytelling series featuring DuPage County organizations and artists. The videos generated more than 70,000 views by local Facebook users in just a few weeks."

- Ryan Green, Iron Light



The Impact of Our Initiatives:



Next Generation Initiative (NGI) engages our county's next generation of philanthropic leaders by providing opportunities to connect, learn, and give back. Because of the generosity of our sponsors, members, and event attendees during FY19, we:

GRANTED \$11,000 TO:

- The GardenWorks Project
- Little Friends, Inc.
- Loaves & Fishes Community Services

PROVIDED A SPECIAL COMMUNITY INNOVATION GRANT OPPORTUNITY, AWARDING \$37,500 TO:

- Little Friends, Inc.
- NAMI DuPage
- Teen Parent Connection

in support of their innovative work to transform the lives of DuPage residents.



"After moving to DuPage County in 2015, I looked for a way to **connect with local not-for-profits and other like-minded philanthropists.** I found that in NGI and its 80+ members, all passionate about giving back. I appreciate the window NGI provides into the needs of our community, and I'm blessed to be a part of the great work we're doing."
 - Karen Fleming,
 NGI Vice Chair

"NGI opened my eyes to the underserved in DuPage County. Through fundraising and family-friendly volunteer opportunities, I'm proud to engage my young children in the next generation of philanthropists. **It's a privilege to call myself a member of NGI.**"
 - Derek Johnson,
 NGI Steering Committee Member

"We received a grant and volunteer service hours from the NGI team, building and refreshing gardens for families and children facing hunger. Our organization was founded on the principle of volunteerism as a means to engaging the community on broader issues; NGI is living this. What an energizing way to equip our **future philanthropic leaders with a vision for giving!**"
 - Jeannie Iseman,
 The GardenWorks Project

Thank you to our 2019 Annual Corporate Sponsors for your support of NGI!



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!

Unrestricted Funds

- Johansen Family Fund

Agency Endowment & Designated Funds

- Bridge Communities, Inc. Charitable Gift Annuity Fund III
- DuPage River Preservation Fund of The Conservation Foundation
- ESSE Adult Day Services Agency Fund
- H.O.M.E. DuPage Agency Fund
- Maple Street Chapel Agency Fund II
- Mental Health Awareness Fund of Central DuPage Pastoral Counseling Center
- Turning Pointe Autism Foundation Agency Fund
- Wyndemere Donor Fund

Donor-Advised Funds

- Michael E. and Nancy E. Drevalas Foundation
- Grover Hermann Sunset Fund
- Joseph P. and Margery E. Lamonica Family Fund
- A. George and Patricia C. Pradel Fund
- Asok K. Ray, MD Fund
- Trabilsy Fund

Scholarship Funds

- James R. Bonde Memorial Scholarship Fund
- Jim Tyree Excellence in Coaching Scholarship Fund

Operating Funds

- Strategic Plan Implementation 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.

Remember Us in Your Estate Plan

When making or updating your will, consider a gift to the DuPage Foundation. Consult your estate planning attorney to assist in adding one of the following 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}).”

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

Leave a Lasting Legacy

The DuPage Foundation's Legacy Society honors our generous and forward-thinking donors who have included the Foundation in their estate plans. By utilizing a will, living trust, charitable remainder trust, charitable gift annuity, insurance policy, or qualified retirement plan, you can ensure that your legacy will have a transformational impact on our community for generations to come.

We sincerely thank our partners, those listed below, and those who choose to remain anonymous, for their generosity and commitment to our community. Members as of June 30, 2019 are as follows.

Remembered	Alan D. and Jane M. Hoffmann Alan D. and Jane M. Hoffmann Fund	Jean C. Neill Lewis E. and Jean C. Neill Fund
Anonymous (91)		
Phillip L. and Judith E. Barnett Phil and Judy Barnett Family Fund	James M. and Sharon A. Huck General Endowment Fund and Wheaton Public Library Endowment Fund	Timothy J. Newmann Janice Newmann Memorial Scholarship Fund
Howard C.* and Shirley A.* Benson Shirley and Howard Benson Fund	Elizabeth L. Jens* Mental Health Association of DuPage County Endowment Fund	Ellen Noth
Herbert J. Bock* Betty M. Bock Fund	Melvin E.* and M. Joyce Johnson Melvin E. and M. Joyce Johnson Fund	Alyse S. and Jeffrey A. Pleiter Pleiter Family Fund
Ronald R. Bork* Ronald R. Bork Fund	Arthur J.* and Mary* Kolar John and Elsie, Mary and Arthur Kolar Endowed Fund	Steven J. and Laurie Reitman
Jerry C.* and Betty J. Bradshaw Jerry Bradshaw Memorial Scholarship Fund and Megan Bradshaw Memorial Scholarship Fund	Kathleen Lamonica Krochock Joseph P. and Margery E. Lamonica Family Fund	Albert A.* and Mimi Rose
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Linda S. Carpenter Linda S. and Clark G. Carpenter Fund	Paul F. and Eileen M. LeFort LeFort-Martin Family Donor-Advised Fund	Nancy E. Sindelar* Freedman/Sindelar Family Fund
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Ruth* and Hugh* Christ Ruth and Hugh Christ Fund	Estate of Grace Lopatka* General Endowment Fund	Dianne M. Skeet* Donald and Dianne Skeet Fund and Donald and Dianne Skeet Scholarship Fund
Edward S. and Shirley J. Crawford Shirley and Ed Crawford Fund	David M. and Mary A. McGowan	James M. and Ruth Ann Snodgrass Snodgrass Family Fund
Donald T. Dennerlein Donald T. Dennerlein Fund	Charles M. and Kathleen A. McKenna	John W. "Bill" Squire* John W. Squire Fund
Lloyd E.* and Mary C.* Eckerson Monarch Landing Benevolent Care Fund	Robert V.* and Laurie K. McMahon Robert and Laurie McMahon Family Fund	David A. Stelzner and Nicki J. Krafft Andi Stelzner Fund
Burton E.* and Patricia A. Ericson Burton E. and Patricia A. Ericson Family Fund	Jack E. and Kathleen G. Mensching General Endowment Fund	Lenora J. Su, M.D.
Douglas G. and Martha R. Eyles Gene Ball Eyles Fund	William H. Mitchell	Daniel R. and Adele M.* Szymanski Szymanski Family Fund
James Gates* Health Fund	Joseph S. and Joan S. Morrissey Morrissey Family Fund	Charlie A. Thurston
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Willis M. Gillett Willis M. Gillett Family Fund	Ramon A. Mulholland* Mulholland Family Fund	Mary Eleanor and James M. Wall Mary Eleanor and James M. Wall Fund
Howard G. Goldstein and Margaret A. McGrath	Gwendolyn S. Mundell Gwen Mundell Memorial Scholarship Fund	Donald* and Dorothy B.* White General Endowment Fund and B.R. Ryall Designated Fund
Jane Henderson* Rotary Club of Lombard Endowment Fund	Charlotte L. Mushow Mushow Fund for Human Services	Leslie A. and Mary E. Wiberg Leslie A. and Mary E. Wiberg Fund
	Brien J. and Carolyn J. Nagle	Carson R. and Dawn C. Yeager

Statement of Financial Position

ASSETS

	<u>2019</u>	<u>2018</u>
Cash and Equivalents	\$ 2,978,663	\$ 1,303,196
Investments	93,215,390	90,764,543
Pledges Receivable	533,879	569,629
Charitable Lead Trust Receivable	167,472	170,281
Fees Receivable	159,718	153,973
Prepaid Expenses	35,078	41,179
Cash Value of Life Insurance	525,206	535,381
Reinsurance Contract	9,116	38,167
Property and Equipment	1,303,753	1,351,362
Total Assets	\$ 98,928,275	\$ 94,927,711

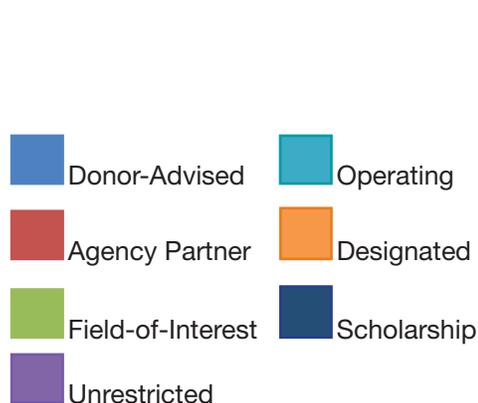
LIABILITIES AND NET ASSETS

Liabilities

Accounts Payable	\$ 3,963	\$ 20,285
Agency Funds	18,153,225	16,201,773
Annuity Payable	121,326	156,935
Accrued Expenses	56,624	58,017
Total Liabilities	\$ 18,335,138	\$ 16,437,010

Net Assets

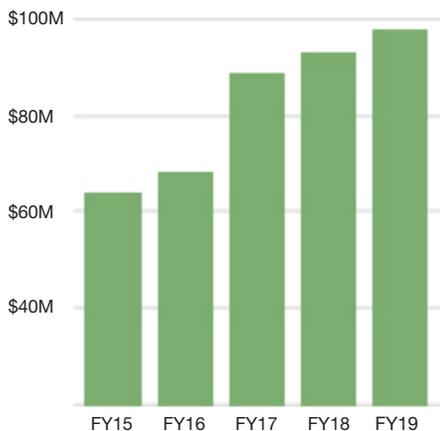
Without Donor Restrictions	\$ 13,285,103	\$ 13,104,517
With Donor Restrictions	67,308,034	65,386,184
Total Net Assets	\$ 80,593,137	\$ 78,490,701
Total Liabilities and Net Assets	\$ 98,928,275	\$ 94,927,711



Statement of Activities

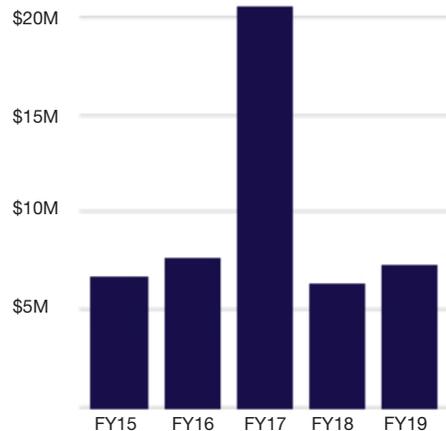
	Without Donor Restrictions	With Donor Restrictions	Total	2018
Revenue				
Gifts, Bequests, and Grants	\$ 603,637	\$ 6,415,982	\$ 7,019,619	\$ 5,947,801
Net Investment Gains (Losses)	210,226	1,494,649	1,704,875	4,486,876
Investment Income	35,713	1,739,452	1,775,165	1,134,875
Fee Revenue	165,883	-	165,883	202,501
Net Assets Released from Restrictions	7,728,233	(7,728,233)	-	-
Total Support and Revenue	\$ 8,743,692	\$ 1,921,850	\$ 10,665,542	\$ 11,772,053
Expenses				
Grants Awarded	\$ 6,756,791	-	\$ 6,756,791	\$ 4,819,615
Grantmaking Activities	896,820	-	896,820	752,164
Management and General	409,381	-	409,381	398,318
Fundraising	500,114	-	500,114	461,729
Total Expenses	\$ 8,563,106	-	\$ 8,563,106	\$ 6,431,826
Increase (Decrease) in Net Assets	\$ 180,586	\$ 1,921,850	\$ 2,102,436	\$ 5,340,227
Net Assets - Beginning of Year	\$ 13,104,517	\$ 65,386,184	\$ 78,490,701	\$ 73,150,474
Net Assets - End of Year	\$ 13,285,103	\$ 67,308,034	\$ 80,593,137	\$ 78,490,701

Assets



FY15	\$ 62,815,765
FY16	\$ 64,455,964
FY17	\$ 87,821,181
FY18	\$ 94,927,711
FY19	\$ 98,928,275

Contributions



FY15	\$ 6,810,927
FY16	\$ 7,320,162
FY17	\$ 21,137,341
FY18	\$ 5,947,801
FY19	\$ 7,019,619

Grants



FY15	\$ 3,598,673
FY16	\$ 3,672,065
FY17	\$ 5,163,818
FY18	\$ 4,819,615
FY19	\$ 6,756,791

The fiscal year 2019 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.

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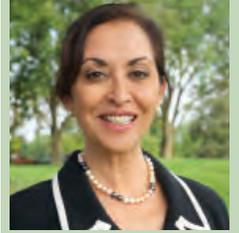


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Visit dupagefoundation.org.

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* Remembered



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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.

