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

Mission: To foster philanthropy, connect donors to area needs and build community partnerships.
Letter From The Board Chair & CEO

Dear Friends,

The fiscal year ending June 30, 2020, demonstrated the impact DuPage Foundation is having on our community and highlighted more than ever the benefits of a strong community foundation in DuPage County. During the first three quarters of the fiscal year, DuPage Foundation was on a trajectory toward growth based on the work our Board and committees completed for a new strategic plan and creative messaging that was planned to launch us into a successful 2020. But then, like everywhere else in the world, March of 2020 happened: COVID-19. The global pandemic caused a hard pivot affecting the final quarter and is still shaping our future, as it is everyone’s.

Despite the pandemic, DuPage Foundation granted nearly $8.8 million to strengthen our community and the causes that matter most to you. Of that total, $1.4 million was quickly raised and distributed to qualifying not-for-profits from mid-March through November, 2020, to fight the COVID-19 pandemic locally.

At the same time, our Community Needs grant program also supported area not-for-profits, helping them meet the unique and shifting needs of their clients. Our second annual Arts DuPage Month in October 2019, highlighted the many arts activities available throughout DuPage County. And our Bright & Early DuPage initiative supported thousands of children and their families, significantly improving their chances of succeeding in kindergarten and in life.

This impact was made possible by steady asset growth, including $9.1 million in deposits and contributions, and seven new Legacy Society members, a special circle of 166 Foundation friends, whose commitments represent tens of millions of dollars in pledged estate gifts.

When the pandemic hit, we didn’t miss a step even as we transitioned our staff to a safe, work-from-home model in just a few days. Then we took aim with the DuPage Foundation COVID-19 Response Fund. The impact we delivered to our community was unmistakable. We invite you to See More Impact with us—a community foundation that fosters philanthropy, connects donors to area needs and builds community partnerships to address critical areas of need.

Thank you for all you have done to make this another great year. We appreciate your continued support and look forward to Doing a World of Good In Our Own Backyard.™

Sincerely,

Joseph L. Weidenbach
Board Chair
FY20-FY21

David M. McGowan, CFRE
President & CEO
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Who’s on the cover?
DuPage Foundation is about connecting donors and grantees to see more impact. On the cover, real people are depicted who are representative of our community and are connected through DuPage Foundation. They are (from top left):

First Row:
Amina Saeed – Referring Attorney
Chris Ellerman – Grantee
Wes Becton – Board Member

Second Row:
Dianne Engram – Committee Member
Al and Patti Gustafson – Donors
Betsy Goltermann – Board Member

Third Row:
Megan Lynch – Committee Member
Gerald Lewis – Board Member
Jim Myers – Board Member
Fiscal Year 2020 Board Of Trustees

Officers

Chair  
Joseph L. Weidenbach  
Naperville  
U.S. Bank

Vice Chair  
Nathaniel P. Wasson  
Hinsdale  
Capital Group

Secretary  
Delrose A. Koch  
Glen Ellyn  
Clingen Callow & McLean, LLC

Treasurer  
Ernest J. Mrozek  
Hinsdale  
St. Rita High School

Welcome New FY21 Trustees

Julius W. (Wes) Becton III  
Elmhurst  
George Washington Street Partners

Betsy Goltermann  
Elmhurst  
KI Industries

Gerald E. Lewis Jr.  
Naperville  
BMO Harris Bank U.S.

James G. Myers  
Glen Ellyn  
Simon/Myers

Mary Kay Kluge  
Naperville  
Morgan Stanley (Retired)

Betsy K. Brosnan  
Naperville  
Sassetti, LLC (Retired)

Denise A. Horne  
Naperville  
McDonald’s Corporation

Denise A. Gierach  
Aurora  
The Gierach Law Firm

John W. Kaiser Jr.  
Glen Ellyn  
Cray, Kaiser Ltd.

William E. Blum  
Naperville  
Anthony Auto Group

Dorothy I. O’Reilly  
Wheaton  
NAMI DuPage

Diana L. Martinez  
Glen Ellyn  
McAninch Arts Center

Kevin J. Phillips  
St. Charles  
Savant Wealth Management

Charles E. Saul Jr.  
Glen Ellyn  
Bank of America Merrill Lynch (Retired)

Paul C. Miles  
Naperville  
We Raise Foundation

Peter A. Paolilli  
Naperville  
Altair Advisors

Megan M. Shebik  
Wheaton  
Kemper Insurance (Retired)

Joyce A. Webb  
Glen Ellyn  
Aon (Retired)

Roger P. McDougal  
Glen Ellyn  
Northern Trust

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

Paula A. Schaefer  
Rosemont  
Dominion National Life Insurance

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

Betsy Goltermann  
Elmhurst  
KI Industries

Gerald E. Lewis Jr.  
Naperville  
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Megan M. Shebik  
Wheaton  
Kemper Insurance (Retired)

Joyce A. Webb  
Glen Ellyn  
Aon (Retired)
Fiscal Year 2020 Committee Members

Members who served July 1, 2019 - June 30, 2020

<table>
<thead>
<tr>
<th>Arts DuPage</th>
<th>Bright &amp; Early DuPage</th>
<th>Grant</th>
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<td>Megan Shebik‡</td>
<td>Neil Goltermann†</td>
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<td>Joyce Webb‡</td>
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It's easy to donate! Visit dupagefoundation.org.
Development Revenue For FY20 Totaled: $7,769,826

July 2019
Angel Idowu installed as first JCS Fund of the DuPage Foundation Arts Correspondent at WTTW-Channel 11 on Chicago Tonight
Next Generation Initiative & DuPage County Bar Association jointly hosted a Summer Happy Hour at Chicago Golf Club that sold out to benefit CASA DuPage and raised $7,240
Hosted Chicago Symphony Orchestra at Wyndemere
Landed on Crain’s Chicago Business top 25 Chicago area foundations list at number 21
Surpassed $50 million in cumulative grants

August 2019
Diana Martinez, Paul Miles, Peter Paolilli, Kevin Phillips, and Ted Saul joined Board of Trustees.
Second Arts DuPage Month a big hit with high profile speaker Randy Cohen
Bright & Early DuPage sponsored premier of No Small Matters film
Sponsored Frida Fest at the MAC
Past Board Chair advisory luncheon hosted

September 2019
Masquerade Ball, the fall benefit fundraiser, broke all records: raised more than $480,000
Sponsored DuPage County Estate Planning Council breakfast
Dave McGowan presented to the DuPage Mayors and Managers Conference
Celebrated National Philanthropy Day and National Community Foundation week

October 2019
Holiday open house held to distribute Community Needs Grants totaling $310,000 to DuPage not-for-profits
This would be the last in-person event to be held at the Foundation before the pandemic

November 2019

December 2019

NGI fall social held at Alter Brewing Company, benefitting Cosley Zoo, raised $2,700
DuPage County Historical Society presented its Recognition Award to DuPage Foundation
Arts DuPage Month generates buzz with mentions on:
• Arts Alliance Illinois
• WDCB 90.9 FM
• Backstage Buzz with McAninch Arts Center’s Diana Martinez
• Hinsdale Living magazine
• Positively Naperville newspaper
• West Suburban Living magazine
Joe Weidenbach elected 11th chair of DuPage Foundation board

dupagefoundation.org
Hosted a presentation on the “Setting Every Community Up for Retirement Enhancement” (SECURE) Act

Kait Balsewicz moderated a “Not-for-Profit Career” panel discussion for the West Suburban Philanthropic Network

Next Generation Initiative Charity Trivia sold out, raising over $8,000. The winning team bestowed a $2,000 grant to North Central College’s Center for Financial Literacy

Les and Mary Wiberg demonstrated their support for DuPage Foundation’s Arts DuPage initiative with a $100,000 Matching Gift Challenge

Ronald Bork estate granted $40,000 toward the introduction of Hinsdale Humane Society and A.D.O.P.T. Pet Shelter’s new van for safe animal transport

Celebrated co-founder Mary Eleanor Wall’s 90th birthday

The Foundation and Arts DuPage proudly sponsored (and attended!) the College of DuPage Foundation’s “For the Love of Frida Gala” on February 14 with award-winning Chicago chef Rick Bayless

Two grants totalling $500,000 were received by the Foundation from the Illinois COVID-19 Response Fund ensuring a third round of grant awards for DuPage not-for-profits

In total the Foundation raised and granted $1.4 million from the COVID-19 Response Fund

DuPage Foundation featured on WDCB and WBBM reporting on its COVID-19 response in DuPage County

Recognized more than 150 volunteers with National Volunteer Week

Transitioned all meetings to virtual Zoom format

Hosted webinar featuring Dan Cronin: “Answering the Call: A Coordinated Response to the COVID-19 Crisis for DuPage County” to help residents better understand the impact of COVID-19 on DuPage County and how the community was responding

Awarded 31 not-for-profits $500K in Spring Community Needs Grant Program

Ginger Wheeler joins staff as director of communications, creating a new department as envisioned by the 2020-2024 Five-Year strategic plan

Hosted a webinar: “Navigating a New Charitable Tax Landscape” featuring Amy Van Polen of Bridge Communities, Terry Cicero of DHJJ and Mike Sitrick

As it became more clear that all in-person arts events were being cancelled and there was no end in sight to the pandemic, Arts DuPage shifted to an advocate role to help arts organizations survive the pandemic financially
Community Needs Grant Program

Community Needs, DuPage Foundation’s flagship grant program, supports the dedicated work of local not-for-profits that are addressing critical issues throughout DuPage County.

Where the Funds Originated

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

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
- 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
- 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

FY20 Grant Total: $814,421/62 Grants

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>Health and Human Services</td>
<td>62%</td>
</tr>
<tr>
<td>Education</td>
<td>16%</td>
</tr>
<tr>
<td>Arts &amp; Culture</td>
<td>14%</td>
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<tr>
<td>Environment</td>
<td>6%</td>
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<tr>
<td>Animal Welfare</td>
<td>2%</td>
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</tbody>
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In FY20, the Community Needs grant program funded applications supporting:

Health & Human Services
- Behavioral health
- Disability services
- Emergency assistance
- Food pantries
- Healthcare access
- Homeless prevention

Education
- After-school programs
- Literacy tutoring
- Nutrition/health education
- Youth education

Arts & Culture
- Arts participation
- Senior outreach
- Youth art education

Environment
- Conservation
- Environmental education
- Recycling

Animal Welfare
- Veterinary care for cats and dogs

Donor-Advised Funds

In addition, the following donors and donor-advised fund representatives helped to increase the available grant amount with $220,733 in additional support for the FY20 Community Needs grant budget.

- Phil and Judy Barnett Family Fund
- Betty M. Bock Fund
- Linda and Clark G. Carpenter Fund
- Edward & Minnie Ceragioli Fund
- Donor Advised Fund for Needy Children
- Effort Counts Twice Fund
- Harbaugh Family Fund
- Kenneth Brooks Holland Memorial Fund
- JCS Arts, Health and Education Fund
- Morrissey Family Fund
- Betty W. Smykal
- Snodgrass Family Fund
- Andi Stelzner Fund
Where the Funds Were Disbursed

In total, 95 not-for-profits applied for Community Needs grants in FY20. By combining Community Needs funding with donor-advised fund grant recommendations, the Foundation funded 65 percent of the proposed projects, for a total of $814,421 in grants.

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 the Foundation connect donors to the local organizations doing work that aligns with their interests.

See dupagefoundation.org/Grants for program descriptions.

**Health and Human Services: $505,483**
- 360 Youth Services: $20,000
- Bridge Communities, Inc.: $20,000
- Care for Cars: $12,000
- CASA of DuPage County, Inc.: $20,000
- Chicago Dental Society Foundation: $20,000
- Donka, Inc.: $15,000
- DuPage Health Coalition: $20,000
- DuPage Sponsors: $10,000
- DuPagePads: $20,000
- Easter Seals DuPage & Fox Valley: $20,000
- Evangelical Child & Family Agency: $10,000
- Friends for Therapeutic Equine Activities: $15,000
- Healthcare Alternative Systems, Inc.: $10,000
- Little Friends, Inc.: $10,000
- Mercy Housing Lakefront: $15,000
- Metropolitan Family Services DuPage: $20,000
- NAMI DuPage: $20,000
- Neighborhood Food Pantries: $20,000
- Northern Illinois Food Bank: $20,000
- Outreach Community Ministries: $20,000
- People’s Resource Center: $9,983
- Ray Graham Association: $20,000
- Roselle UMC Community Food Pantry: $20,000
- SamaraCare: $20,000
- Sharing Connections: $20,000
- Special Kids Day: $6,000
- Syrian Community Network: $10,000
- Teen Parent Connection: $20,000
- Wayne/Winfield Area Youth/Family Service: $2,500
- World Relief DuPage: $20,000

**Education: $128,738**
- Alive Center: $15,000
- The Community House: $10,000
- Dare to Dream: Get Educated!: $14,500
- The GardenWorks Project: $5,000
- Giant Steps: $14,238
- Glen Ellyn Children’s Resource Center: $20,000
- KidsMatter: $20,000
- Literacy DuPage: $20,000
- Robert Crown Center for Health Education: $10,000

**Arts & Culture: $112,950**
- Addison Center for the Arts: $3,750
- Anima – Glen Ellyn Children’s Chorus: $3,000
- BrightSide Theatre: $5,000
- Buffalo Theatre Ensemble: $10,000
- Chicago Sinfonietta: $15,000
- ClaySpace: $5,000
- College of DuPage Foundation: $20,000
- Covenant Living Communities and Services: $5,000
- DuPage Symphony Orchestra: $10,000
- Elmhurst Art Museum: $20,000
- Elmhurst Symphony Association: $2,500
- Glen Ellyn-Wheaton Chorale: $2,000
- Music Institute of Chicago: $2,000
- Reclaim 13: $2,200
- Spirito!: $5,000
- St. Andrew Lutheran Church: $2,500

**Environment: $52,250**
- The Conservation Foundation: $12,000
- Morton Arboretum: $13,000
- SCARCE: $20,000
- Village of Glen Ellyn: $7,250

**Animal Welfare: $15,000**
- West Suburban Humane Society: $15,000
COVID-19 Response

The fourth quarter of FY20 truly showed the DuPage County community why a community foundation is needed and how it makes an enormous difference to the quality of life for all residents. See more information about DuPage Foundation’s COVID-19 response and community support at dupagefoundation.org/COVID.

COVID-19 Relief Fund
Gifts as of 6/30/20: $1,217,014

COVID-19 Relief Fund
Grants as of 6/30/20: $1,000,000

Number of Organizations Receiving Relief: 60
At the time of publication $1.4 million had been raised and granted to 80 organizations.

Leadership: DuPage Foundation hosted a webinar titled Answering the Call: A Coordinated Response to the COVID-19 Crisis for DuPage County featuring DuPage County Board Chair Dan Cronin. More than 500 attended.

“During this unprecedented time of the COVID-19 pandemic, the Foundation’s leadership in rallying private and corporate resources to support vulnerable families through the nonprofit community makes a profound difference.”

- Chris Ellerman
Chief Executive Officer and Chief Development Officer, Outreach Community Ministries
### COVID-19 Response Fund Grants Made as of June 30, 2020:

#### Access to Healthcare: $111,000
- Access Community Health Network: $10,000
- Almost Home Kids: $15,000
- DuPage Health Coalition: $45,000
- DuPage Health Matters: $1,000
- Ray Graham Association: $10,000
- United Cerebral Palsy Seguin of Greater Chicago: $10,000
- VNA Health Care: $20,000

#### Childcare for Essential Workers: $10,000
- Tri-Town YMCA: $10,000

#### Employment Support: $10,000
- Career & Networking Center: $10,000

#### Food and Emergency Financial Assistance: $550,000
- Caring Network: $2,500
- Catholic Charities, Diocese of Joliet: $30,000
- College of DuPage Foundation: $20,000
- DuPage Senior Citizens Council: $50,000
- Educare West DuPage: $20,000
- Elmhurst Walk-in Assistance Network: $15,000
- Family Focus: $20,000
- Farmworker and Landscaper Advocacy Project: $5,000
- Glen Ellyn Food Pantry: $20,000
- HCS Family Services: $15,000
- HOME DuPage: $20,000
- Hope’s Front Door: $10,000
- Humanitarian Service Project: $7,000
- Immigrant Solidarity DuPage: $5,000
- Indian Prairie Educational Foundation: $4,500
- Loaves & Fishes Community Services: $35,000
- LOVE Christian Clearinghouse: $2,500
- Metropolitan Family Services DuPage: $15,000
- Naperville Education Foundation: $9,500
- Neighborhood Food Pantries: $15,000
- People’s Resource Center: $35,000
- Serenity House Counseling Services, Inc.: $20,000
- Student Excellence Foundation for Wheaton Warrenville District 200: $9,500
- Teen Parent Connection: $10,000
- The Salvation Army: $20,000
- Tri-Town YMCA: $15,000
- United Community Concerns Association: $9,500
- West Suburban Community Pantry: $35,000
- World Relief DuPage: $35,000
- Xilin Association: $10,000
- YWCA Metropolitan Chicago: $30,000

#### Housing: $116,000
- 360 Youth Services: $15,000
- Bridge Communities, Inc.: $25,000
- ChildServ (now Kids Above All): $6,000
- DuPagePads: $25,000
- H.O.M.E. DuPage, Inc.: $20,000
- Metropolitan Family Services DuPage: $20,000
- Senior Home Sharing, Inc.: $5,000

#### Mental Health Services: $94,500
- NAMI DuPage: $25,000
- Northeast DuPage Family and Youth Services: $6,500
- Outreach Community Ministries: $18,000
- SamaraCare: $45,000

#### Technology to Support Virtual Health and Education: $108,500
- Alive Center: $5,000
- B.R. Ryall YMCA : $20,000
- Easter Seals DuPage & Fox Valley: $20,000
- Glen Ellyn Children’s Resource Center: $5,000
- KidsMatter: $5,000
- Little Friends, Inc.: $7,500
- Northeast DuPage Special Recreation Association: $14,000
- Spectrios Institute for Low Vision: $10,000
- The Community House: $6,000
- Turning Pointe Autism Foundation: $3,000
- Wellness House: $8,000
- Youth Outlook: $5,000
We are grateful to DuPage Foundation for its support that has enabled our partnership group to be in place for several years. Had the AECC not been in place as a community hub, able to coordinate immediate collaborative action, hundreds of fragile families (impacted by poverty, unemployment, or being “essential workers”) would not have been able to meet all their basic needs for food, diapers and wipes, or to access critical family support services.

— Mary Haley
Project Director, Addison Early Childhood Collaborative

Studies show the single most important thing a community can do to prepare for the future is to educate children. Families are eager for their children to succeed. But for families who live in poverty, who may be immigrants and don’t speak the language well, who lack basic transportation and/or who have never experienced a supportive family network, the struggle is real. For these families, a simple thing like preparing a four-year-old for kindergarten can seem an insurmountable task. These families need our help. That’s where Bright & Early DuPage comes in.

Bright & Early DuPage funds networks that bring together social services, school districts, private and public daycares and other organizations on the front lines working with children. Bright & Early DuPage is a game-changer.

Joan Morrissey is a member of the DuPage Foundation Board of Trustees and serves on the Bright & Early DuPage Committee. She said, “The collaboratives have been a critical lifeline for these parents. They’ve been able to connect these families who desperately needed food, shelter, clothing, medicine and more. These families have a lot of fear, but they’ve learned to trust us. Through the collaboratives, they’re getting educational assistance to help their kids prepare for school. It’s providing screenings for delays and issues which are so correctable with early interventions. We’re really showing impact. We know that it’s essential and it’s working to help the whole community and all our schools do better.”

“Investing in early childhood development of disadvantaged children will produce great returns to individuals and society in better education, health, economic and social outcomes – not only saving taxpayers money but increasing our nation’s economic productivity.”

— James Heckman, Nobel Prize Winner
Strengthening Communities

Research shows that children who participate in quality early learning experiences during their first five years of life are better prepared to succeed in kindergarten which ultimately puts them on the path for lifelong success.

Raising Quality of Life for All

Helping those with the fewest resources raises the level of education for the entire class thus impacting every child’s educational career. Ultimately, everyone living in the community enjoys a raised quality of life when every child is prepped and ready for kindergarten.

Seven Collaborative Networks

- DuPage Early Childhood Collaboration (DECC)
  DECC is the county-wide umbrella organization that works with the local collaboratives in DuPage County, six of which are funded by Bright & Early DuPage including:
    - Addison Early Childhood Collaborative
    - Bensenville Early Learning Supporters
    - Birth to 5 Community Coalition (Bloomingdale, Carol Stream and Hanover Park)
    - Glenbard Early Childhood Collaborative
    - Wheaton/Warrenville Early Childhood Collaborative
    - Willowbrook Corner Coalition

Screening for Developmental Delays

Developmental delays in children can derail educational achievements. Early intervention can change a child’s developmental path and can often reduce the long-term effects of a disability or delay if needs are identified early. In FY20, 43% of children screened for special needs or developmental delays were referred for intervention. Many conditions are correctible and the child goes on to a successful educational experience. 878 children were referred for intervention in FY20, a 52% increase.

Increasing Access to Quality Programs

FY20 saw a 6% increase in the number of children enrolled in publicly-funded early childhood programs, which is 121 more than in FY19. It happened with diligence, commitment and relationship-building.

Strengthening Communities

Research shows that children who participate in quality early learning experiences during their first five years of life are better prepared to succeed in kindergarten which ultimately puts them on the path for lifelong success.

Connecting with Families

The first step in improved outcomes is finding new families who need help. The six collaborative networks identified and screened 2,050 children in FY20, a 26% increase over FY19.

Building Trust

Reaching out, promoting and engaging with families builds the trust needed to provide the services that ensure littles are getting the support they need. It starts with trust. Regular home visits promote positive parenting practices that help parents better prepare their children for school. There were 1,083 home visiting slots in FY20, a 55% increase over the past two years.

Legend

<table>
<thead>
<tr>
<th>Bright &amp; Early Grantee</th>
<th>No</th>
<th>Yes</th>
<th>Newly added to Bensenville Collaborative in FY20</th>
</tr>
</thead>
</table>

• DuPage Early Childhood Collaboration (DECC)
  DECC is the county-wide umbrella organization that works with the local collaboratives in DuPage County, six of which are funded by Bright & Early DuPage including:
    - Addison Early Childhood Collaborative
    - Bensenville Early Learning Supporters
    - Birth to 5 Community Coalition (Bloomingdale, Carol Stream and Hanover Park)
    - Glenbard Early Childhood Collaborative
    - Wheaton/Warrenville Early Childhood Collaborative
    - Willowbrook Corner Coalition
Advocating For The Arts Community

Arts DuPage jumped into FY20 powered by the success of the previous year. October 2019 witnessed a well-received second Arts DuPage Month, beginning with a kick-off celebration that brought nationally recognized arts advocate Randy Cohen to the region. Arts DuPage continued its ongoing efforts to forge connections between artists, venues, organizations and the community resulting in record numbers of participation, impressions, reach and event postings at ArtsDuPage.org. When COVID-19 struck, closing all venues, Arts DuPage was quick to respond and pivot to an advocacy role. The result was instant gratitude from the arts community as Arts DuPage assisted its survival of the pandemic. Learn more at DuPageFoundation.org/ArtsDuPage.

Weekly Email Communication resulted in
53,599 ↑ Impressions

Facebook
Annual Impressions
1,584,863 ↑ 25.8%

October 2019 Arts DuPage Month
50 participating organizations

Featuring nationally-known arts advocate Randy Cohen
Vice President of Research, Americans For The Arts

4 sessions/2 workshops:
• Building a Better Community through the Arts
• Partnering with the Arts: An Rx for a Healthy Community

In-person reception: Engaged leaders in government, education, arts and the DuPage community.

In such times as we are experiencing, the arts are generally adversely affected and we need to push forward together so that we all come out for the better when we have left these travails behind us.”

- W. Brand Bobosky, President, Naperville Century Walk Corporation

I am most grateful to you, Arts DuPage.”

– Bernard J. Kleina, award-winning local artist

“Hands Good by Bernard J. Kleina

dupagefoundation.org
Engaging Next Generation Donors

The power of passion has never been more visible than in the work of one special group of people: DuPage Foundation’s Next Generation Initiative (NGI). Consisting of members from all ages and backgrounds, NGI empowers our county’s next generation of philanthropic leaders by providing them with opportunities to connect, learn and give back. While in-person events were suspended after the outbreak of COVID-19, NGI resumed with virtual activities in July enabling its members to continue connecting and making a difference.

Next Generation Initiative (NGI) Highlights:

Hosted third annual Charity Trivia Night in January 2020 with 33 trivia teams (200+ attendees), selling out Empire Burgers & Brew. Raised more than $8,000.

Hosted 2 social events (in July and September 2019). The July event was hosted at Chicago Golf Club in partnership with DuPage County Bar Association and featured CASA of DuPage County. The September event featured Cosley Zoo and had a corresponding volunteer project.

Grants Awarded: $11,940
- CASA of DuPage County: $7,240
- Cosley Zoo: $2,700
- North Central College’s Center for Financial Literacy: $2,000

Memberships: 79 individuals and families joined NGI in calendar year 2019 and 50 have joined in 2020 as of 11/2020.

NGI Endowment: Raised $25,931 for the NGI Fund in sponsorships, membership dues, and gifts to defray the cost of NGI events and build its grant making endowment.

“"I've loved being part of the Next Generation Initiative community! It’s such an engaging way to support the not-for-profits doing important work right here in my own backyard in DuPage County."”

-Megan Lynch
NGI Steering Committee Member

2020 Corporate Sponsors:

Pictured above (from L to R): Cathy Mousseau (Cosley Zoo), Amber Drew (NGI Steering Committee), Jenny Theuman (Cosley Zoo)

DuPage Medical Group
Charitable Fund

Aon
Empower Results

Donation Realty
Your Home | Our Community
**Advancement Team Highlights**

Donor engagement and stewardship are the cornerstone of a successful community foundation. The Advancement Team works diligently throughout the year to educate and support area residents, businesses, and their advisors to help them maximize the effectiveness and efficiency of their giving.

### Hosted 8 successful educational events reaching 1000s of DuPage residents

### ANNUAL BENEFIT HIGHLIGHTS:
The 2019 Annual Benefit DuPage Foundation **Masquerade Ball**

<table>
<thead>
<tr>
<th>Record</th>
<th>Gross Revenue</th>
<th>Net Increase for Operating Fund Over 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>$87K</td>
<td>$480K+</td>
<td>16%</td>
</tr>
</tbody>
</table>

**Paddle Raise**

**Welcome Fund Partners: 12 new funds established**

DuPage Foundation is grateful to our many donors and agency partners for their confidence and trust in our stewardship.

#### Agency Endowment & Designated Funds

- Alive Center Agency Fund
- The Conservation Foundation Unrestricted Endowment Fund
- Educational Assistance, LTD. Designated Fund
- Glen Ellyn Children’s Resource Center Agency Fund
- Glen Ellyn Children’s Resource Center Expansion Fund

#### Donor-Advised Funds

- Alexandra’s Purse Fund
- Amethyst Fund
- Kaelan Mondragon Memorial Fund
- Paula K. Partipilo Fund
- Reedy-Williams Family Fund
- Sinnott Family Fund

#### Field-of-Interest Fund

- COVID-19 Response 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.

### 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

Supports 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:

1. "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})."

2. "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.
Legacy Society Ensures Future Impact

The DuPage Foundation Legacy Society honors our generous and forward-thinking donors who have included the Foundation in their estate plans. You can ensure your legacy will have a transformational impact on our community for generations to come by naming DuPage Foundation as a beneficiary in your estate plan. 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, 2020, are as follows:

Anonymous (95)
Phillip L. and Judith E. Barnett
Howard C.* and Shirley A.* Benson
Herbert J. Bock*
Ronald R. Bork*
Jerry C.* and Betty J. Bradshaw
John J. Bryant*
Stephen M. and Emily L. Burt
Cleve E. Carney*
Linda S. Carpenter
Susanne S. Cassell*
Ruth* and Hugh* Christ
Edward S. and Shirley J. Crawford
Donald T. Dennerlein
Lloyd E.* and Mary C.* Eckerson
Burton E.* and Patricia A. Ericson
Douglas G. and Martha R. Eyles
Vincent J. and Susan L. Furman
James Gates*
Leonard J.* and Barbara A. Giblin
George N. Gilkerson Jr.
Willis M. Gillett
Howard G. Goldstein and Margaret A. McGrath

Jane Henderson*
Alan D. and Jane M. Hoffmann
James M. and Sharon A. Huck
Elizabeth L. Jens*
Melvin E.* and M. Joyce Johnson
Arthur J.* and Mary* Kolar
Kathleen Lamonica Krochok
William E. Kronenberg
Richard W. and Mary S. Kuhn
Richard J. and Susan M. Lamb
Paul F. and Eileen M. LeFort
Paul J. and Coleen J. Lehman
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Charlotte L. Mushow
Brien J. and Carolyn J. Nagle
Jean C. Neill*
Timothy J. Newmann
Ellen Noth
Alyse S. and Jeffrey A. Pleiter
Steven J. and Laurie Reitman
Albert A.* and Mimi Rose

Michael J. and Mary T. Schroeck
F. Ron and Carol L. Seager
Steve E. and Megan M. Shebik
Nancy E. Sindelar*
Michael R. and Elizabeth E. Sitrick
Dianne M. Skeet*
James M. and Ruth Ann Snodgrass
John W. “Bill” Squire*
David A. Stelzner and Nicki J. Krafft
Lenora J. Su, M.D.
Daniel R. and Adele M.* Szymanski
Charlie A. Thurston
Mark M. and Barbara L. Turner
Theodore M. Utchen
Mary Eleanor and James M. Wall
Donald* and Dorothy B.* White
Leslie A. and Mary E. Wiberg
Carson R. and Dawn C. Yeager

NEW LEGACY SOCIETY MEMBERS:
- Anonymous (6)
- Vincent J. and Susan L. Furman

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*Remembered
Ways to Give

One advantage of giving through 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 70½ and 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. For donors 72 and older, QCDs can count toward 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 at DuPage Foundation provides a simpler, cost-effective alternative. A donor-advised fund can also be set up at the Foundation to work as a side-car to a private foundation to facilitate grant anonymity when desired, receive support in the identification and vetting of charitable opportunities, and to provide the potential for more favorable tax-deductibility on new charitable gifts.

**Charitable Gift Annuities**
In exchange for cash or property, the Foundation pays the donor or beneficiary guaranteed fixed payments for life or a term of years. 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**
Charitable Lead 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 or beneficiaries such as children and grand children or others named by the 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.
Why I Give/ Why I Refer

Dr. Sunil Chand
Retired: Former president, College of DuPage; Former professor, Benedictine University

Passion: **Providing immigrant assistance; Women, children and family needs; Early childhood education**

“**DuPage Foundation** serves the people of **DuPage County** as nimbly and efficiently as possible. They have a broad and sharp understanding of where the most compelling needs are and act with great speed and compassion.”

Dick Kuhn, JD
Partner, Kuhn, Heap & Monson

Passion: **Helping senior citizens locally; Music; the Arts**

Donor-Advised Fund: **Richard and Mary Kuhn Family Fund**

“When clients come to me for financial direction and are interested in philanthropy, **I tell them to look to DuPage Foundation**. Anyone can set up a donor-advised fund with a well-known national financial institution, but do their advisors know the local landscape? Do they care about it?

With DuPage Foundation, you get people who really care. You get like-minded local philanthropists and volunteers with nothing to gain but the same goal as you: To raise the quality of life for all DuPage County residents.”

Maureen Sullivan Taylor, JD
Partner: Sullivan Taylor, Gumina & Palmer, P.C.

Passion: **Helping families with the fewest resources**

Donor-Advised Fund: **Sullivan Taylor Family Fund**

“I consider it a privilege and a responsibility to be able to give back. It brings Terry and me great joy. When others are looking for a conduit where their gifts can have the most impact, I refer them to DuPage Foundation.”

Roger Ritzman, JD
Partner: Peregrine, Stime, Newman, Ritzman & Bruckner, Ltd.

Passion: **Supporting organizations to help those with special needs and sustaining the environment**

Donor-Advised Fund: **Ritzman Family Fund**

“Everybody, whether able-bodied or with special needs, deserves the opportunity for interaction with the great outdoors for health, fresh air, sunshine and camaraderie. I believe in supporting organizations that make that happen. Through Field-of-Interest and Donor-Advised funds, that’s exactly what you can do through the guidance and commitment of DuPage Foundation. They make it easy.”
## Statement of Financial Position

### ASSETS

<table>
<thead>
<tr>
<th>Description</th>
<th>2020</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash and Equivalents</td>
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<td>$2,978,663</td>
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<tr>
<td>Investments</td>
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<td>Pledges Receivable</td>
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<td>Charitable Lead Trust Receivable</td>
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<td>Fees Receivable</td>
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<td>Prepaid Expenses</td>
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<td>Cash Value of Life Insurance</td>
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<td>Property and Equipment</td>
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<td><strong>Total Assets</strong></td>
<td><strong>$97,402,516</strong></td>
<td><strong>$98,928,275</strong></td>
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### LIABILITIES AND NET ASSETS

#### Liabilities

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<tr>
<th>Description</th>
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<td>Annuity Payable</td>
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<td>Accrued Expenses</td>
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<td>Other Liabilities</td>
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<tr>
<td><strong>Total Liabilities</strong></td>
<td><strong>$18,413,931</strong></td>
<td><strong>$18,335,138</strong></td>
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#### Net Assets

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<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Without Donor Restrictions</td>
<td>$13,463,417</td>
<td>$13,285,103</td>
</tr>
<tr>
<td>With Donor Restrictions</td>
<td>65,525,168</td>
<td>67,308,034</td>
</tr>
<tr>
<td><strong>Total Net Assets</strong></td>
<td><strong>$78,988,585</strong></td>
<td><strong>$80,593,137</strong></td>
</tr>
</tbody>
</table>

**Total Liabilities and Net Assets**

<table>
<thead>
<tr>
<th>Description</th>
<th>2020</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>$97,402,516</strong></td>
<td><strong>$98,928,275</strong></td>
<td></td>
</tr>
</tbody>
</table>
## Statement of Activities

### INCOME AND EXPENSE

<table>
<thead>
<tr>
<th></th>
<th>Without Donor Restrictions</th>
<th>With Donor Restrictions</th>
<th>Total 2020</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Revenue</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gifts, Bequests, and Grants</td>
<td>$2,354,877</td>
<td>$5,414,949</td>
<td>$7,769,826</td>
<td>$7,019,619</td>
</tr>
<tr>
<td>Net Investment Gains (Losses)</td>
<td>(374,907)</td>
<td>(121,982)</td>
<td>(496,889)</td>
<td>1,704,875</td>
</tr>
<tr>
<td>Investment Income</td>
<td>48,225</td>
<td>1,501,934</td>
<td>1,550,159</td>
<td>1,775,165</td>
</tr>
<tr>
<td>Fee Revenue</td>
<td>177,615</td>
<td>-</td>
<td>177,615</td>
<td>165,883</td>
</tr>
<tr>
<td>Net Assets Released from Restrictions</td>
<td>8,577,767</td>
<td>(8,577,767)</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td><strong>Total Support and Revenue</strong></td>
<td>10,783,577</td>
<td>(1,782,866)</td>
<td>9,000,711</td>
<td>10,665,542</td>
</tr>
</tbody>
</table>

| **Expenses**              |                            |                         |            |      |
| Grants Awarded            | 8,814,664                 | -                       | 8,814,664  | 6,756,791 |
| Grantmaking Activities    | 633,058                   | -                       | 633,058    | 896,820 |
| Management and General    | 569,319                   | -                       | 569,319    | 409,381 |
| Fundraising               | 588,222                   | -                       | 588,222    | 500,114 |
| **Total Expenses**        | 10,605,263                | -                       | 10,605,263 | 8,563,106 |

| **Increase (Decrease) in Net Assets** | 178,314                   | 1,782,866              | (1,604,552) | 2,102,436 |

| **Net Assets** - Beginning of Year | 13,285,103                | 67,308,034             | 80,593,137 | 78,490,701 |

| **Net Assets** - End of Year | **$13,463,417** | **65,525,168** | **$78,988,585** | **$80,593,137** |

---

**Assets**

<table>
<thead>
<tr>
<th>Year</th>
<th>Total Assets</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY16</td>
<td>$64,455,964</td>
</tr>
<tr>
<td>FY17</td>
<td>$87,821,181</td>
</tr>
<tr>
<td>FY18</td>
<td>$94,927,711</td>
</tr>
<tr>
<td>FY19</td>
<td>$98,928,275</td>
</tr>
<tr>
<td>FY20</td>
<td>$97,402,516</td>
</tr>
</tbody>
</table>

**Contributions**

<table>
<thead>
<tr>
<th>Year</th>
<th>Total Contributions</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY16</td>
<td>$7,320,162</td>
</tr>
<tr>
<td>FY17</td>
<td>$21,137,341</td>
</tr>
<tr>
<td>FY18</td>
<td>$5,947,801</td>
</tr>
<tr>
<td>FY19</td>
<td>$7,019,619</td>
</tr>
<tr>
<td>FY20</td>
<td>$7,769,826</td>
</tr>
</tbody>
</table>

**Grants**

<table>
<thead>
<tr>
<th>Year</th>
<th>Total Grants</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY16</td>
<td>$3,672,065</td>
</tr>
<tr>
<td>FY17</td>
<td>$5,163,818</td>
</tr>
<tr>
<td>FY18</td>
<td>$4,819,615</td>
</tr>
<tr>
<td>FY19</td>
<td>$6,756,791</td>
</tr>
<tr>
<td>FY20</td>
<td>$8,814,664</td>
</tr>
</tbody>
</table>

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*The fiscal year 2020 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.*
Engaging DuPage Residents

It takes hundreds of people working together to make a community foundation work. When people come together with the intention of raising the quality of life in a community, issues that need attention and collaboration become a rallying point toward common ground.

Coordinated, Collective Impact

Through committees and task forces, initiatives and programs, sourcing the organizations and people who can make a difference, then developing action steps and finding the funds needed to effect positive change, translate to a non-profit ecosystem for good.

Deep and Local Expertise

Thirty-five years of experience and connection with the providers and change makers who effect the most impact yield a differentiator that is attractive to those who want action.

Inspired, Personalized Counsel

Becoming a giver has never been easier, more seamless or offered the opportunity to be more effective. A meeting with DuPage Foundation’s team yields choices and programs for the goals that can be carried out for maximum impact.

Effective Philanthropy

The goal of DuPage Foundation’s marketing is to inform, educate, engage and ultimately for donor dollars to be put to use in the community where it is making a difference.

Awards and Recognition

DuPage Foundation was listed by Crain’s Chicago Business among the leading Chicagoland foundations according to the ranking of its 2019 assets.

At its Annual Meeting in September, 2019, the DuPage County Historical Society bestowed its Recognition Award to DuPage Foundation. President & CEO Dave McGowan attended the meeting to accept the award which was subsequently highlighted in the Historical Society’s email blast following the meeting. The Historical Society’s capital campaign was the recipient of the first grant DuPage Foundation made in 1987.
**Foundation Staff**

DuPage Foundation staff members have a sincere and common sense of giving back to the community and a devotion to charity in general. Yusra Javed Chaudhry and Alice Wood joined the staff after FY20, but prior to publication of this annual report.
Electronic Service Requested

Please contact our office if you have corrections to your address information. Thank you!

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.