

2020 Fiscal Year Annual Report

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, workfrom-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,

an

Joseph L. Weidenbach Board Chair FY20-FY21

David M. McGowan, CFRE President & CEO



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

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DuPage Foundation

Fiscal Year 2020 Board Of Trustees

Officers



Chair Joseph L. Weidenbach *Naperville* U.S. Bank

Trustees



Vice Chair Nathaniel P. Wasson *Hinsdale* Capital Group



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



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



William E. Blum Naperville Anthony Auto Group



Betsy K. Brosnan *Naperville* Sassetti, LLC (Retired)



Denise A. Horne *Naperville* McDonald's Corporation



Denice A. Gierach *Aurora* The Gierach Law Firm



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



Mary Kay Kluge Naperville Morgan Stanley (Retired)



Diana L. Martinez Glen Ellyn McAninch Arts Center



Roger P. McDougal *Glen Ellyn* Northern Trust



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



Paul C. Miles *Naperville* We Raise Foundation



Joan S. Morrissey Wheaton Retired



Dorothy I. O'Reilly Wheaton NAMI DuPage



Peter A. Paolilli *Naperville* Altair Advisors



Kevin J. Phillips St. Charles Savant Wealth Management



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



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

Arts DuPage

Dorothy O'Reilly^ Diana Martinez⁺ Julie Curran Brian Lynch John McKinnon Joan Morrissey Tony Payne Sara Phalen David Rice Sheila Rutledge Christina Salerno James Sheehan Margaret Sindelar Robin Tryloff

Audit

Betsy Brosnan^ John Kaiser Jr.⁺ Norman Beles Barry Horek Christopher Janc

Benefit

Nathaniel Wasson^ Dorothy O'Reilly⁺ Carol Adams June Barnard William Blum Christine Fenne Arica LeFevour Katelyn Moon Tamara Ortegel Peter Paolilli Nathan Ronchetti Kim Ulfig Amy Weidenbach Cherri Zboril

Board Development

Roger McDougal^ William Blum Delrose Koch Peter Paolilli Nathaniel Wasson

Bright & Early DuPage

Joan Morrissey^ Joyce Webb⁺ Sandra Biegel Cleo Burtis Erin Cetera Deborah du Vair Theresa Hawley Janet Hodge Candace King Peter Noronha Marcia Tornatore Nathaniel Wasson Sally Winger

Bylaws

Delrose Koch^ Denise Horne⁺ Norman Beles John Kaiser Jr. Megan Shebik

Executive

Joseph Weidenbach^ Nathaniel Wasson⁺ Denice Gierach Delrose Koch Charles McKenna Ernest Mrozek Kevin Phillips Megan Shebik

Financial Operations

Charles McKenna^ John Kaiser Jr.+ William Blum Matthew Booth Laurie McMahon Eugene Ognibene Peter Paolilli Steven Shebik

Glen Ellyn Fund

Michael Malone^ Adrianne Gregory Phillip Hartweg Joyce Webb

Grant

Megan Shebik^ Roger McDougal⁺ Ruth Carlson Deborah du Vair Dianne Engram Betsy Goltermann Supriya Jasuja Mary Kay Kluge Paul LeFort Gerald Lewis Laurie McMahon Laurie Reifel

Investment

Kevin Phillips^ Braden Waverley⁺ Daniel Bukowski Patricia deRosset Michael Havala Daniel Maguire Charles McKenna Ernest Mrozek Charles Saul Jr. James Snodgrass

Marketing

James Myers^ Matthew Biespiel William Blum Anna Clarke Dusty Holoubek Joyce Hothan Margie Lawless Paul Miles Joyce Webb

Next Generation Initiative

Brendan Connolly^ Karen Fleming⁺ Kate Bousum J. Amber Drew Dusty Holoubek John Hughes Derek Johnson Henry Kaskov Megan Lynch Juliana Maller Devon Moon Tamara Ortegel Luke Widmer

^ Chair

Professional Advisor

+ Vice Chair

Neil Goltermann^ Alice Wood⁺ Brandy Harrington William Hassett Nancy Hermann Delrose Koch Brien Nagle Natalie Perry

Strategic Planning

Ernest Mrozek^ Deborah du Vair Denice Gierach Delrose Koch Charles McKenna Joan Morrissey James Myers Megan Shebik Nathaniel Wasson Joseph Weidenbach

Trustees Emeriti

David P. Aldridge Norman J. Beles Betty J. Bradshaw Jerry C. Bradshaw* Stephen M. Burt Cleve E. Carney* Carole J. Cline Brett M. Dale Elizabeth D. Eben* George N. Gilkerson Jr. Willis M. Gillett Janet A. Hodge Joseph F. Kindlon* Jack T. Knuepfer* Paul J. Lehman **Daniel Maguire** Brooks McCormick* Laurie K. McMahon Vincent A. Naccarato Nancy E. Sindelar* Ralph Smykal* Charlie A. Thurston Mary Eleanor Wall Carson R. Yeager

* Remembered



Development Revenue For FY20 Totaled: \$7,769,826



July 2019 August 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

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



September 2019 October 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

DuPage Foundation sponsored Continuing Education for Professional Advisors – "From Philanthropy to Social Investing: A New Way of Giving" by Avery Tucker Fontaine, head of strategic philanthropy, BNY Mellon Wealth Management

Sponsored Frida Fest at the MAC

Past Board Chair advisory luncheon hosted

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



November 2019 December 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

Holiday open house held to distribute Community Needs Grants totaling \$310,000 to DuPage not-for-profits

This would be the last inperson event to be held at the Foundation before the pandemic

- Positively Naperville
 newspaper
- West Suburban Living magazine

Joe Weidenbach elected 11th chair of DuPage Foundation board

Total Grants Awarded: \$8,814,664



January 2020 February 2020

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



March 2020



Transitioned all staff to emergency work from home model

Launched *DuPage Foundation COVID-19 Response Fund* with support led by Birck Family of Hinsdale and Naperville through a \$150K gift, along with \$100,000 gifts from the Hyett family and an anonymous corporate foundation

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



May 2020 June 2020

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:

Alan D. and Jane

Joseph and Bess

Jack and Virginia

Knuepfer Fund

John W. Squire Fund

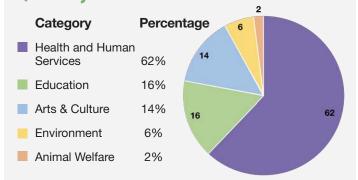
Kindlon Fund

M. Hoffmann Fund

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
- 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



In FY20, the Community Needs grant program funded applications supporting:

Health & Human Services

- Behavioral healthDisability services
- Emergency assistance
- Food pantries
- Healthcare access
- Homeless prevention

Education

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

Donor-Advised Funds

In addition, the following donors and donoradvised 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

- Animal Welfare
- Veterinary care for cats and dogs

Arts & Culture
 Arts participation

Environment

Recycling

Conservation

- Senior outreach
- Youth art education

Environmental education

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 Northeast DuPage Family and Youth Services: \$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 <u>Gifts</u> as of 6/30/20:



COVID-19 Relief Fund Grants as of 6/30/20:



Number of Organizations Receiving Relief:

60

\$1,217,014

\$1,000,000

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.

ANSWERING

A COORDINATED RESPONSE TO THE COVID-19 CRISIS FOR DUPAGE COUNTY





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



Impacting Communities By Preparing Children For Kindergarten



An Initiative of the DuPage Foundation



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

S tudies 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.

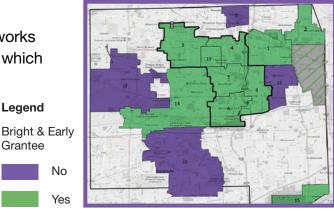
Joan Morrissey is a member of the DuPage Foundation Board of Trustees and serves on the Bright & Early DuPage Committee. She said, "The collaboratives have been a critical lifeline for these parents. They've been able to connect these families who desperately needed food, shelter, clothing, medicine 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

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



Newly added to Bensenville Collaborative in FY20



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.

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.

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.



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.

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



A DuPage Foundation Initiative

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.



dupagefoundation.org

Hands Good by Bernard J. Kleina

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-forprofits doing important work right here in my own backyard in DuPage County.

CASA of DUPAGE COUNTY

-Megan Lyncn NGI Steering Committee Member

NORTH CENTRAL III COLLEGE

2020 Corporate Sponsors:



Donation Realty



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

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

Record

Paddle Raise



16%



net increase for operating fund over 2018.

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

Field-of-Interest Fund

COVID-19 Response Fund

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

Types of Funds

Unrestricted

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

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:

"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.

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:

NEW LEGACY SOCIETY MEMBERS:

- Anonymous (6)
- Vincent J. and Susan L. Furman

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 Krochock 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 Estate of Grace Lopatka* David M. and Mary A. McGowan Charles M. and Kathleen A. McKenna Robert V.* and Laurie K. McMahon Jack E. and Kathleen G. Mensching William H. Mitchell Joseph S.* and Joan S. Morrissey Ernest J. and Diane M. Mrozek Karl W. and Jeanne M. Mueller Ramon A. Mulholland* Gwendolyn S. Mundell 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.* Szvmanski 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



Sue and Vince Furman

Foundation

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, recieve 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.

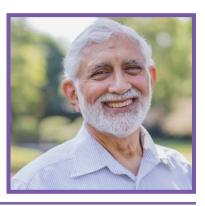


Why I Give/ Why I Refer

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

⁴⁴ 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*

⁴⁴ 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 likeminded 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

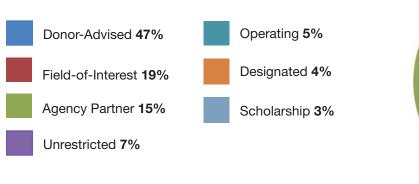
Everybody, whether able-bodied or with special needs, deserves the opportunity for interaction with the great outdoors for health, fresh air, sunshine and camaraderie. I believe in supporting organizations that make that happen. Through Field-of-Interest and Donor-Advised funds, that's exactly what you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

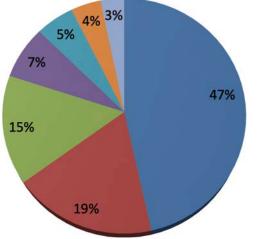


Statement of Financial Position

ASSETS

Cash and Equivalents Investments Pledges Receivable Charitable Lead Trust Receivable Fees Receivable Prepaid Expenses Cash Value of Life Insurance Reinsurance Contract Property and Equipment	2020 \$ 3,856,813 91,286,128 188,211 121,455 153,523 34,299 505,942 - 1,256,145	2019 \$ 2,978,663 93,215,390 533,879 167,472 159,718 35,078 525,206 9,116 1,303,753
Total Assets	\$ 97,402,516	\$98,928,275
LIABILITIES AND NET ASSETS		
Liabilities Accounts Payable Agency Funds Annuity Payable Accrued Expenses Other Liabilities	\$ 3,789 18,071,527 90,451 73,864 174,300	\$ 3,963 18,153,225 121,326 56,624 -
Total Liabilities	\$ 18,413,931	\$ 18,335,138
<u>Net Assets</u> Without Donor Restrictions With Donor Restrictions Total Net Assets	\$ 13,463,417 65,525,168 78 988 585	\$ 13,285,103 67,308,034 \$ 80,593,137
Total Liabilities and Net Assets	\$ 97,402,516	\$ 98,928,275





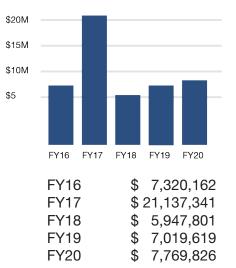
Statement of Activities

INCOME AND EXPENSE	Without Dono Restrictions		Total <u>2020</u>	<u>2019</u>
Revenue				
Gifts, Bequests, and Grants	\$ 2,354,877	\$ 5,414,949	\$ 7,769,826	\$ 7,019,619
Net Investment Gains (Losses)	(374,907)	(121,982)	(496,889)	1,704,875
Investment Income	48,225	1,501,934	1,550,159	1,775,165
Fee Revenue	177,615	-	1 77,615	165,883
Net Assets Released from Restrictions	8,577,767	(8,577,767)	-	-
Total Support and Revenue	10,783,577	(1,782,866)	9,000,711	10,665,542
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



Contributions



Grants



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.

DuPage Foundation

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

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1	JOHN O. & CATHERINE T. MACARTHUR FOUNDATION 140 5. Dearborn St. Sale 1200. Chicago 50602: Machound.org	Julia M. Stauch President	54,099.8	1304.8 5256.5	*	Y	-	-	200	1		No.	\$15.0; Siema Dule Foundation	184	. 23
2	CHICAGO COMMUNITY TRUST ⁴ 225 N. Michigan Ave., Suite 2206, Chicago 60601; CCT.org	Holena D. Gayle President, CRO	12,626.2	5363.7 5308.1	a				1		-		535-3 Dube University		24
3	JEWISH UNITED FONO/JEWISH FEDERATION OF CHICAGO ⁴ 30 S. Web St, Chicago 60606; All any	Loroile Nasatir President	63,348,4 51,876,2	£218.5 5192.9	"	1	-			10,000	-		e ² (34.7; leadsh federations of North America	336	25
4	ROBERT A. INCOMPLEX FOUNDATION ⁴ 205 N. Michigan Awe, Suite 4006, Chicago 60601, McCarmick/Foundation.org	Bavid D. Hiller Freident, CIO	\$1,616.5" \$1,782.4"	\$46.6 \$89.2	n	Č		-		· CHORE	*	*	51.5. United Way-McCarmics Pertnership for Strong Neighborhoods Inc.	113	26
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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.



David M. McGowan, CFRE President & CEO *Lisle*



Kaitlyn M. Balsewicz, CFRE Development Officer *Winfield*



Yusra Javed Chaudhry Graphic Designer Oak Brook



Laura R. Ernst Program Associate Arlington Heights



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



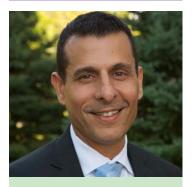
Barbara S. Szczepaniak Vice President for Programs *Elmhurst*



Deborah L. Venezia Director of Arts DuPage Naperville



Karen L. Vicary Office Manager *Elmhurst*



David A. Weisz Vice President for Finance *Carol Stream*



Ginger Wheeler Director of Communications *Glen Ellyn*



Matt S. Wilson Accounting Associate *Westchester*



Alice M. Wood, JD Director of Gift Planning *Naperville*





3000 Woodcreek Dr., Suite 310 Downers Grove, IL 60515 630.665.5556 dupagefoundation.org



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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.



