

CELEBRATING



YEARS

1986 - 2021

ANNUAL REPORT

Fiscal Year 2021

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

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

DuPage
Foundation 
Doing a world of good in our own backyard®

Letter From the Board Chair & CEO

As we celebrate DuPage Foundation's 35th anniversary and reflect on our beginnings, we are inspired by the Foundation's history of tremendous growth, both in assets and charitable impact, made possible by the ongoing support of donors and community partners like you seeking to make a difference in DuPage County.

Without knowing its potential, the Foundation was a dream of three DuPage County residents who banded together 35 years ago and took their passion for helping others to create a vehicle to connect donors to local causes. The Foundation's first exploratory meeting was held on January 15, 1986 titled "Proposed DuPage County Charitable Fund." While there are notes of planning activity in the fall of 1985, this was the first official meeting to discuss creating a community foundation which would operate as a donor-advised fund of The Chicago Community Trust.

What started out as a \$50,000 permanent endowment in 1986 has grown into \$125 million in charitable assets and \$60 million distributed in cumulative grants. The generosity that flows into the Foundation has transcended our mission to raise the quality of life throughout DuPage County and beyond.

In the last fiscal year, the Foundation established 17 new funds, welcomed seven new members to our Legacy Society, and granted almost \$9 million through the *Community Needs Grant Program*, special initiatives, donor-advised grants and designated grants. Through the *COVID-19 Response Fund* that began in FY20, the Foundation deployed nearly \$1.8 million in assistance to the community after additional rounds of grantmaking in FY21.

DuPage Foundation's founders - the late **Jerry Bradshaw**, the late **Brooks McCormick** and **Mary Eleanor Wall** - had a vision to create an environment of community giving. Through their vision and the generous contributions of local philanthropists like you, the Foundation continues to be DuPage County's philanthropic leader and we are proud to celebrate these significant milestones with our community.

They say history repeats itself. If that philosophy holds true, we cannot wait to see what we can accomplish together for our community in the next 35 years. Thank you for supporting DuPage Foundation as we continue to advance our efforts of **doing a world of good in our own backyard.**®

Sincerely,



A handwritten signature in black ink, appearing to read "Joe Weidenbach".

Joseph L. Weidenbach
Board Chair, FY21



A handwritten signature in black ink, appearing to read "Dave McGowan".

David M. McGowan, CFRE
President & CEO

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About the cover

On September 30, 1986, The DuPage Community Foundation was officially introduced as the new charitable conduit for DuPage County.



Read about our history and milestones over the last 35 years on page 6.

Fiscal Year 2021 Board of Trustees

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Glen Ellyn
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Members who served July 1, 2020 - June 30, 2021

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Megan Shebik
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Nancy E. Sindelar*
Ralph Smykal*
Charlie A. Thurston*
Mary Eleanor Wall
Carson R. Yeager

* Remembered

It's easy to donate! Visit dupagefoundation.org.

Celebrating 35 Years of Raising the

From stepping stones to milestones, the Foundation's humble beginnings have grown into \$185 million in total charitable capital in the last 35 years. With \$60 million in cumulative grants distributed since 1986, the Foundation is poised to have an exponential impact on serving the growing needs of our community.

1986

The DuPage Community Foundation is formally established as a donor-advised fund of The Chicago Community Trust, starting out with a \$100,000 matching challenge grant. An advisory committee of community leaders is appointed to oversee the Foundation.

1992-1993

DuPage Foundation surpasses \$1 million in charitable assets.

1998

The Foundation celebrates \$1 million in grants awarded on behalf of DuPage County.

2007

The Next Generation Initiative is established as a way of endowing our future by cultivating our next generation of philanthropic leaders. The Foundation's assets grow to \$25 million.

2011

The Foundation celebrates its 25th anniversary surpassing \$30 million in assets and \$10 million in cumulative grants. The Legacy Society grows to more than 100 members.

2015

Arts DuPage is launched by the Foundation to support, promote, and advocate for the arts in DuPage County.



2020

DuPage Foundation sets up a *COVID-19 Response Fund* and awards nearly \$1.8 million in grants to DuPage not-for-profit organizations.

1987-1988

The Foundation awards its first grant to the DuPage County Historical Society for \$10,000. In 1988, the Foundation awards \$50,000 in grants to six area organizations.

1994

DuPage Foundation separates from The Chicago Community Trust and receives 501(c)(3) status.

2001-2004

The Foundation receives its first million-dollar gifts. After receiving several major gifts, the Foundation's charitable assets total \$15 million.

2010

The Foundation distributes more than \$1 million in grants in a single year for the first time and celebrates awarding more than \$10 million in its history.



2013

Bright & Early DuPage is launched, ensuring that children in DuPage are prepared to enter kindergarten and poised to succeed in life.

2017

The Gustafson Family Foundation makes a landmark investment in DuPage Foundation transferring its nearly \$17 million in assets to create our largest donor-advised fund and cement a longtime partnership. The Foundation surpasses \$70 million in assets and \$30 million in cumulative grants.

2021

The Foundation celebrates its 35th anniversary and surpasses \$125 million in assets and \$60 million in cumulative grants.

Quality of Life in DuPage County

Within the last four years, the Foundation doubled its charitable impact, distributing \$60 million in cumulative grants, compared to awarding \$30 million in cumulative grants as 2017 came to a close. Since its inception in 1986, the Foundation distributed 8,614 grants to 1,472 not-for-profit agencies serving the residents of DuPage County and beyond.

During the last decade, the Foundation's annual grant distributions have increased from \$1.4 million in 2011 to more than \$8.9 million today.

In 1987, the fifth grant awarded from the Foundation was for \$10,000 to Family Shelter Service (FSS) for a counselor to help victims of domestic violence. FSS is now a program of Metropolitan Family Services DuPage (MFS). During the 2021 spring grant cycle of *Community Needs*, a \$20,000 grant to MFS restricted for FSS is what pushed DuPage Foundation over the \$60 million mark of cumulative grants distributed.

Through the *Community Needs Grant Program*, special initiatives, donor-advised grants and designated grants, the Foundation is committed to supporting local not-for-profit organizations in all areas of service to help DuPage residents in need.

Doubled charitable impact in five years:

\$30 million
in grants as of FY16

\$60 million
in grants as of FY21

\$100,000
Starting grant

↓
\$125 Million
in assets

Since 1986:
8,614 grants
to **1,472**
not-for-profit
agencies

1999



During the 1999 grant breakfast, Trustee Emeritus David Aldridge presents a \$2,500 check to Karen Kuchar, former executive director of Family Shelter Service, to support a family-centered counseling program.

2014



Fifteen years later, in 2014, DuPage Foundation's VP for Programs Barb Szczepaniak presents a \$150,000 check to MFS to support the Addison Early Childhood Collaborative.

“

“Part of the Foundation's ongoing strategic plan is to grow our endowment to expand our role as the County's philanthropic leader. With increased capital, the Foundation can broaden the scope of our services, build additional community initiatives and provide greater support to not-for-profit organizations.”

-Dave McGowan, DuPage Foundation president & CEO

Community Needs Grant Program

DuPage Foundation's *Community Needs Grant Program* supports programs and projects that improve and enrich the quality of life for DuPage County residents. During two grant cycles each year, applications are accepted from local not-for-profits serving the DuPage County community in five areas of service: health & human services; education; arts & culture; environment; and animal welfare.

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 difference in DuPage County:

Unrestricted Funds

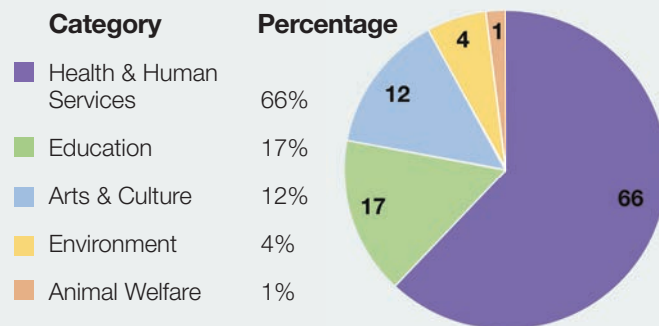
- Conrad and Doris Brassine Charitable Fund
- Cleve E. Carney Fund
- Lois L. and Edwin F. Deicke Fund
- DuPage Forever Fund
- Elizabeth D. Eben Memorial Fund
- Alan D. and Jane M. Hoffmann Fund
- Joseph and Bess Kindlon Fund
- Jack and Virginia Knuepfer Fund
- John W. Squire Fund

Field-of-Interest Funds

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

FY21 Grant Total: \$1,066,052

Up 31% from FY20 (total was \$814,421)



Fiscal Year	Grant Total
1988	\$60,000
1999	\$154,000
2010	\$380,650
2021	\$1,066,052

Donor-Advised Funds

Our sincere thanks to the donors and donor-advised fund representatives who recommended grants totaling \$412,213 to support the *Community Needs* program in FY21.

- Andi Stelzner Fund
- Beles Family Fund
- Beth and Daniel Maguire Family Fund
- Betty M. Bock Fund
- Dawn Carol Foundation
- Donor Advised Fund for Needy Children
- Effort Counts Twice Fund
- Harbaugh Family Fund
- History DuPage Fund
- Hynes Family Fund
- JCS Arts, Health and Education Fund
- Johansen Family Fund
- Paul and Dottie Foundation
- Robert and Laurie McMahon Family Fund
- Shebik Family Fund for Basic Human Needs
- Snodgrass Family Fund
- Sue Wallace Fund

Pass-Through Gifts From:

- Alan and Jane Hoffmann
- Betty W. Smykal
- Lorelei Foundation
- Martha Johnson
- Molex

Where the Funds Were Disbursed

In total, 101 not-for-profit organizations applied for *Community Needs* grants in FY21. By combining *Community Needs* funding with donor-advised fund grant recommendations, the Foundation funded 72 percent of the proposed projects, for a total of \$1,066,052 in grants distributed.

See dupagefoundation.org/grants for program descriptions.

Health & Human Services:

\$702,860

360 Youth Services	\$25,000
Bridge Communities, Inc.	\$25,000
Care for Cars	\$15,000
Caring Network	\$9,300
Catholic Charities, Diocese of Joliet	\$25,000
DayOne PACT	\$22,000
Donka, Inc.	\$7,500
DuPage Health Coalition	\$25,000
DuPage Senior Citizens Council	\$19,000
DuPage Sponsors	\$25,000
Elmhurst Walk-In Assistance Network	\$12,000
Evangelical Child & Family Agency	\$15,000
Friends for Therapeutic Equine Activities	\$15,000
Glen Ellyn Food Pantry	\$5,704
Hamdard Center for Health & Human Services	\$25,000
Healthcare Alternative Systems, Inc.	\$15,000
Little City Foundation	\$2,465
Loaves & Fishes Community Services	\$25,000
Metropolitan Family Services DuPage	\$25,000
National Alliance on Mental Illness DuPage	\$25,000
Neighborhood Food Pantries	\$25,000
Northeast DuPage Family and Youth Services	\$25,000
Northern Illinois Food Bank	\$25,000
Outreach Community Ministries	\$25,000
People's Resource Center	\$21,456
Play for All Playground & Garden Foundation	\$15,000
Ray Graham Association	\$24,835
Riverwalk Adult Day Services	\$10,000
Sharing Connections	\$20,000
Spectrios Institute for Low Vision	\$6,100
Teen Parent Connection	\$20,000
United Cerebral Palsy Seguin of Greater Chicago	\$25,000
Wellness House	\$2,500
West Suburban Community Pantry	\$25,000
World Relief Chicagoland	\$25,000
Youth Outlook	\$20,000
YWCA Metropolitan Chicago	\$25,000

Education

\$180,400

B.R. Ryall YMCA of Northwestern DuPage County	\$20,000
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Best Buddies	\$10,000
Candor Health Education	\$10,000
Career & Networking Center	\$10,000
Creating IT Futures Foundation Inc.	\$2,500
DuPage Children's Museum	\$20,000
Glen Ellyn Children's Resource Center	\$20,000
Green Halo Scholars	\$2,500
H.O.M.E. DuPage, Inc.	\$20,000
Inside Out Club DuPage	\$10,000
Naperville Heritage Society	\$18,000
Pathways for Achievement	\$2,500
Re:new Project	\$6,000
Tri-Town YMCA	\$20,000
Turning Pointe Autism Foundation	\$6,400
Your Children's Bookshelf	\$2,500

Arts & Culture

\$125,825

b.unify	\$11,000
BrightSide Theatre	\$10,000
Chicago Sinfonietta	\$15,000
ClaySpace	\$6,000
College of DuPage Foundation	\$20,000
DuPage County Historical Museum Foundation	\$2,500
Elmhurst Art Museum	\$20,000
ESSE Adult Day Services	\$3,825
Mandala South Asian Performing Arts	\$2,500
Opera for the Young	\$2,500
Spirito!	\$5,000
Storycatchers Theatre	\$2,500
Village of Glen Ellyn	\$12,200
Wheaton Drama, Inc.	\$10,300
Young Naperville Singers	\$2,500

Environment

\$40,000

The Conservation Foundation	\$20,000
The Morton Arboretum	\$15,000
Three Fires Council, BSA	\$5,000

Animal Welfare

\$16,967

Fetching Tails Foundation	\$14,967
Greater Chicago Cage Bird Society	\$2,000

COVID-19 Response Fund Grants Made in FY21

As FY21 began, many local not-for-profit organizations were dealing with the debilitating effects of the pandemic and faced complete shutdowns. To help organizations stay afloat and pivot to virtual or hybrid operations, DuPage Foundation continued with additional rounds of grantmaking through the *COVID-19 Response Fund*. Since the Fund began in 2020, the Foundation granted nearly \$1.8 million in relief assistance. For a full report, visit dupagefoundation.org/covid19.

Addison Center for the Arts	\$4,047	Naperville Art League	\$14,825
Alive Center	\$5,000	Naperville Chorus	\$12,970
Anima – Glen Ellyn Children's Chorus	\$15,000	Naperville Men's Glee Club	\$15,000
Bensenville Wood Dale Food Pantry	\$10,000	Northeast DuPage Family and Youth Services	\$8,500
Bridge Communities, Inc.	\$10,000	Northern Illinois Food Bank	\$7,146
BrightSide Theatre	\$15,000	Ray Graham Association	\$10,000
Buffalo Theatre Ensemble	\$15,000	Reclaim 13	\$5,000
Career & Networking Center	\$10,000	Riverwalk Adult Day Services	\$10,000
CASA of DuPage County, Inc.	\$10,000	Salt Creek Ballet	\$15,000
Chicago Sinfonietta	\$15,000	Spirito!	\$15,000
ClaySpace	\$15,000	Student Excellence Foundation	\$10,000
College of DuPage Foundation	\$20,000	Teen Parent Connection	\$12,340
D41Kids Foundation	\$20,000	The Community House	\$15,000
DayOne PACT	\$12,000	The Salvation Army	\$20,000
Downers Grove Area FISH	\$5,000	The West Towns Chorus	\$12,768
Downers Grove Choral Society	\$10,178	Tri-Town YMCA	\$6,500
DuPage County Historical Museum Foundation	\$15,000	United Cerebral Palsy Seguin of Greater Chicago	\$13,224
DuPage Federation on Human Services Reform	\$4,940	United Community Concerns Association	\$10,000
DuPage Habitat for Humanity	\$10,000	Wood Dale Community United Methodist Church	\$5,000
DuPage Health Coalition	\$30,000	Young Naperville Singers	\$20,000
DuPage Senior Citizens Council	\$10,000	Youth Jazz Ensemble of DuPage	\$870
DuPage Symphony Orchestra	\$20,000		
DuPagePads	\$10,000		
Educare West DuPage	\$10,000		
Elmhurst Art Museum	\$15,000		
ESSE Adult Day Services	\$10,000		
Evangelical Child & Family Agency	\$5,000		
First Folio Theatre	\$20,000		
Glen Ellyn Children's Resource Center	\$5,000		
Glen Ellyn Youth and Family Counseling Service	\$8,000		
Glen Ellyn-Wheaton Chorale	\$8,642		
H.O.M.E. DuPage, Inc.	\$10,000		
Healthcare Alternative Systems, Inc.	\$10,000		
Hinsdale Chorale	\$3,050		
Hope's Front Door	\$10,000		
Immigrant Solidarity DuPage	\$5,000		
KidsMatter	\$15,000		
Little Friends, Inc.	\$10,000		
Lizzadro Museum of Lapidary Art	\$15,000		
Loaves & Fishes Community Services	\$10,000		
Metropolitan Family Services DuPage	\$10,000		
NAMI DuPage	\$45,000		

**Not-for-profit
organizations receiving
relief in FY21:**

63

**(as part of 97 since Fund
began in FY20)**

Grants in FY21

\$755,000

**(as part of \$1.8 million
since Fund began in FY20)**

“

“We are so grateful for the generosity of the DuPage Foundation for food distribution during the pandemic. This grant impacted hundreds of families by providing healthy food during an extremely difficult time.”

-Mike Havala, president & CEO
Loaves & Fishes Community Services



“

“Spirito has been able to survive, thanks in large part to a \$15,000 COVID relief grant received through DuPage Foundation. The grant enabled Spirito to run live rehearsals the second half of the 20/21 season. It also helped with production costs for our live spring concert in June 2021. Thank you DuPage Foundation for helping us through this challenge and for your unwavering support of the arts.”

-Mary Jean Adkins, executive director
Spirito! Singers



“

We are grateful for the continued and generous support of the DuPage Foundation. You are indeed doing a world of good in your own backyard and what a lovely yard it is.”

-Vicki Sebela, executive director, Student Excellence Foundation (supporting District 200 families)



“

“The DuPage Foundation’s philanthropic leadership makes DuPage County a more vibrant and healthy community, especially for our neighbors with disabilities! The Foundation provided a \$10,000 grant to provide personal protective equipment for the people we support and the people who support them. When supply chains were critically low, DuPage Foundation reassured hundreds of DuPage residents with disabilities that they are safe in their home and community.”

-Kim Zoeller, president & CEO
Ray Graham Association

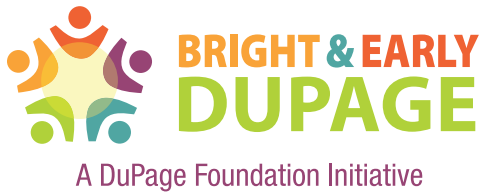


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“DuPage Foundation’s COVID-19 Response Fund was there to propel us forward in every meal we served to a hungry neighbor, every minute of emergency care we provided to children whose parents were on the front line, and every call we made to check on a senior that was facing social isolation. Your generosity has not just made a moment of change, but a lifetime of difference for everyone across the County – thank you for being the impact of hope during such an uncertain time.”

-Sarah A. O’Donnell, CEO
Tri-Town YMCA

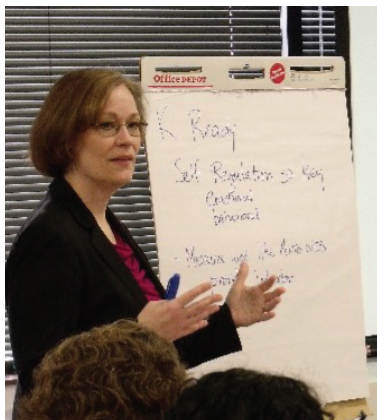




Bright & Early DuPage Initiative Sets Model for Illinois Early Childhood Investments

DuPage Foundation's Bright & Early DuPage initiative focuses on ensuring children from birth to age five in DuPage County receive the comprehensive support critical in preparing them for success in kindergarten and beyond.

Before DuPage Foundation's Bright & Early DuPage (B&ED) initiative was created, there was no road map to building successful publicly-funded early childhood programs for underserved children in DuPage County. Today, the success of the initiative has become a model for the state of Illinois thanks in part to **Theresa Hawley**, PhD, who helped create a comprehensive plan for B&ED and has since pushed for the same development at the state level.



Dr. Hawley presents during a Bright & Early DuPage Committee meeting

In 2003, DuPage Foundation was invited to participate in Grand Victoria Foundation's (GVF) Communityworks initiative, a seven-year, \$12 million initiative

1,699 publicly-funded preschool seats awarded

57% increase since 2018

1,083 home visiting slots

55% increase since 2018

878 special needs and early intervention referrals

52% increase since 2018

designed to strengthen Illinois community foundations and build permanent endowments to benefit organizations working in three key areas: early childhood care and education, workforce development, and land use and protection.

At that time, Dr. Hawley was a trustee for the Gustafson Family Foundation (GFF), a private foundation focused on serving children, which has since become the largest donor-advised fund of DuPage Foundation. Through that role, she facilitated a \$1 million gift from GFF to take advantage of the GVF match and double their impact to support the Foundation's early childhood endowment.

With a strong endowment in place, the B&ED Committee was created to plan how to best use the annual income generated from the fund. Dr. Hawley had the experience of working to promote early childhood care and education in small communities. She saw success bloom from a greater ownership by local facilitators and encouraged the Committee to invest in local community collaborations.

DECC data from 2020

“With her familiarity of the early childhood landscape in DuPage and her expertise on how to best meet the needs of young children and families, Theresa led us on the right track to have the greatest impact with the dollars we had available,” said **Barb Szczepaniak**, vice president for programs. “We were truly lucky to have her knowledge of the systems that needed to be put in place and her assistance in building out the attainable goals of the initiative.”

“As one of the richest counties in the state, we were now dealing with the implications or the suburbanization of poverty,” said Dr. Hawley. “We believed in the power of actually getting folks to work together across all of our different agencies and school districts – and all the players in the community – knowing it was really the most important way to move this work forward.”



In 2012, Dr. Hawley became executive director for the Governor’s Office of Early Childhood Development to coordinate state efforts to support early learning in collaboration with state agencies and the Illinois Early Learning Council.

“The biggest success from Bright & Early DuPage is it has massively increased the amount of federal and state dollars coming into DuPage to be able to serve low-income kids with high-quality preschool or home visiting services,” said Dr. Hawley.

Dr. Hawley stepped away from the B&ED Committee this past year to focus on her role as the early childhood transformation director for NIU, a position created in partnership with the Governor’s office.

“Our pitch to the Governor was that we need to transform the way we are financing early care and education and we need to build a system that has the chance of creating a more equitable set of services for kids and families,” said Dr. Hawley. “It outrages me and it needs to outrage

everyone that in one of the richest counties in the country we find it acceptable somehow that low-income kids in our County are not allowed to go to preschool because we don’t have it for them.”

Dr. Hawley said the state is investing in the same kinds of things as B&ED, not as a replacement for the way that foundations and local entities are investing, but as a supplement to build up robustly across the state.

“Bright & Early DuPage is a model for what’s going on at the state level,” added Dr. Hawley. “The work that happened in DuPage shows the investment in these communities really did make a difference. It was a really important part of the argument for convincing the Governor and others in state leadership that this was an investment worth making. The example of what’s been possible in DuPage is something that inspires a lot of people.”

Since the launch of the B&ED initiative in 2013, the Foundation has seeded and supported six early childhood collaborations and the county-wide DuPage Early Childhood Collaborative (DECC) that serves as a hub for early childhood in DuPage. Through multiple matching challenges and fundraising opportunities, the B&ED endowment has grown to nearly \$7 million today.

“When we launched this initiative focused on creating real system change, we weren’t sure what the community’s response would be or the specific impact we would have,” said Szczepaniak. “To see how much the early childhood landscape in DuPage has changed and knowing that the state is using our work as a model for early childhood is truly wonderful. Due to the collective vision of Bright & Early DuPage and the hard work of the local collaboratives supported through this initiative, many DuPage children have been put on a path to lifelong success.”



The arts were among the hardest hit industries shattered by the impact of COVID-19. At the end of FY21, Arts DuPage posted 220 event listings on artsdupage.org, which was vastly different from FY20's 2,233 events posted. Knowing the arts faced the devastating economic impact of mandated shutdowns, Arts DuPage provided valuable resources to artists and arts leaders to help them remain in operation as much as possible during the pandemic.

Advocate

Arts DuPage secured \$300,000 from DuPage County in funding through the CARES Act for the struggling arts organizations in the community.

Communicator

Arts DuPage sent eblasts on relief funding, emergency resources and critical updates, almost daily, to artists and arts leaders across the County.

Promoter

Arts DuPage adapted the artsdupage.org resource to become the go-to guide for virtual arts and entertainment when activities transitioned to online experiences.

Social Media Expert

Arts DuPage maintained an active community during the pandemic shutdown over the past fiscal year and attracted nearly 60,000 unique users and engaged nearly 22,000 unique users.

Educator

Arts DuPage hosted Zoom happy hours and workshops for members of the arts community to provide opportunities for arts leaders to share information, exchange ideas and learn from experienced professionals.

Event Coordinator

Arts DuPage retooled October's annual Arts DuPage Month and highlighted artists and happenings through a daily social media campaign.

Connector

Arts DuPage facilitated relationships among artists, venues, performers, events and organizations with opportunities which included key connections made for the highly visible "In Focus" and "Frida Kahlo: Timeless" exhibit.

Fundraiser

Arts DuPage participated in the second annual Giving DuPage Days campaign and raised \$5,420.

Leader

Arts DuPage was selected by Arts Alliance Illinois to be among 24 arts leaders recruited for its statewide Arts and Vaccination Campaign, an effort to channel the creative talent of local artists to reach vaccine-hesitant residents.

60,000
unique users
attracted

22,000
unique users
engaged



Photo credit: Martin Luther King Jr. with his wife Coretta Scott King, Summer 1966, Photograph by Bernard Kleina; part of the "In Focus" exhibit at Elmhurst Art Museum

“

From its inception, Arts DuPage has been an important part of the arts community in DuPage County from promoting local artists to providing workshops for artists and arts organizations in all disciplines. During these uncertain times, Arts DuPage was a vital resource in helping arts organizations survive.”

-David M. Rice, executive director
First Folio Theatre

Next Generation Initiative

DuPage Foundation

More than 15 years ago, DuPage Foundation's Next Generation Initiative (NGI) began with a small group of individuals looking to inspire the next generation of philanthropic leaders to make an impact through their own charitable giving. Today, NGI welcomes members from all different backgrounds and age groups who share a common purpose: to connect, learn and give back as they make a difference in DuPage. Determined to stay connected to each other and further the NGI mission during the pandemic, the NGI Steering Committee planned virtual events as COVID-19 prevented any in-person gatherings during the fiscal year.

NGI FY21 Highlights:

**TRIVIA
NIGHT**

Hosted fourth annual Charity Trivia Night virtually in February, 2021 with 27 teams (200 participants)



Hosted three social events (in July, September, and April) featuring the Foundation's COVID-19 Response Fund, Career & Networking Center and Child's Voice

Grants Awarded: \$8,585

Little Friends, Inc. \$1,500



Career & Networking Center \$2,000



Child's Voice \$5,085



Memberships



47 individuals and families joined in calendar year 2020 and 49 have joined in 2021 as of September, 2021

NGI Endowment



Raised \$31,394 in sponsorships, memberships dues and gifts to defray the cost of NGI events and build the grantmaking endowment

2021 Corporate Sponsor

DuPage Medical Group is now:



Advancement Highlights

Fundraising and donor stewardship are the cornerstones of a successful community foundation. The Advancement team diligently engages community leaders and educates donors as well as their estate and financial planners.

Welcome Fund Partners

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

NEW FUNDS ESTABLISHED: 17

Agency Endowment & Designated Funds

- Amber's Fund for Bridge Communities, Inc.
- Children Fund of Central DuPage Pastoral Counseling Center
- DuPage Federation on Human Services Reform Agency Fund
- Giving DuPage Agency Fund
- LOVE Christian Clearinghouse Endowment Fund
- SCARCE Endowment Fund

Donor-Advised Funds

- Crompton Family Fund
- Timothy J. and Jodi L. Greene Fund
- Capt. Bernardo Iorgulescu, USMC Memorial Fund
- Martha J. Johnson Fund
- Charlie and Kathy McKenna Family Fund
- Summer Oaks Fund
- Roethermel Family Fund
- David K. and Martha Reichert Scatterday Fund
- Thomas R. and Shirley A. Scott Fund

Field-of-Interest Funds

- Mental Health Fund
- Utchen Fund for Persons with Disabilities

Types of Funds

Unrestricted

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

Field-of-Interest

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

Donor-Advised

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

Agency & Designated

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

Operating

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 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 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, 2021, are as follows:

Anonymous (94)

Cushman L. and Pamela C. Andrews
 Phillip L. and Judith E. Barnett
 Howard C.* and Shirley A.* Benson
 Herbert J. Bock*
 Ronald R. Bork*
 Jerry C.* and Betty J.* Bradshaw
 Donald A.* and Jane K. Brooks
 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
 RC and Lorraine Crompton
 Donald T. Dennerlein
 James E. and Marie A. Drasal
 Lloyd E.* and Mary C.* Eckerson
 Burton E.* and Patricia A. Ericson
 Douglas G. and Martha R. Eyles
 Diane V. Fox*
 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
 Thomas R. Scott
 F. Ron and Carol L. Seager
 Steven 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

7

NEW LEGACY SOCIETY MEMBERS:

- Anonymous (4)
- RC and Lorraine Crompton
- James E. and Marie A. Drasal
- Diane V. Fox*

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 grandchildren 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

Honorable Kenneth Moy Sr.
Retired Judge, DuPage County
Kenneth Moy Scholarship Fund

"I grew up during a time when prejudice was quite pervasive, so I'd like to help others however I can. It means so much to me that my support can encourage young people to pursue an advanced education."



Carson R. Yeager
Retired Senior Executive, Northern Trust
DuPage Foundation Trustee Emeritus and Legacy Society Member

"The idea that a portion of our estate or an inherited windfall can be donated to create a lasting impact for our community is something we should all consider. DuPage Foundation is a fantastic partner to help people explore their charitable options and see more impact with their philanthropy."



Michael and Mary Schroeck
Donor-Advisors and Legacy Society Members
Michael J. Schroeck Fund

"We see our lives being comprised of three phases: Learn, Earn and Return. We have been blessed in so many ways and we are now in our "Return" phase of life. In this regard, we are trying to be very intentional and focused in our giving to support local charities that serve our most vulnerable population. Thankfully, both our estate planning attorney and financial advisor spoke highly of DuPage Foundation, and we've now been involved with the Foundation for a number of years. We have tremendous respect for DuPage Foundation and we know we can trust it to honor our intent to support our local charities and causes well into the future."



Susan Reedy Williams, JD
Estate Planning Attorney and CPA,
Williams & Kite LLC
Reedy-Williams Family Fund

"DuPage Foundation has a solid financial backing and experienced management. The Foundation empowers donors to give to the charities of their choice, knowing their wishes—and their donations—will be managed expertly and honored in perpetuity."



Interested in learning more about how we can help you accomplish your charitable goals? Please contact **Alice Wood, JD**, Foundation director of gift planning, at alice@dupagefoundation.org or 630.598.5288.



Statement of Financial Position

ASSETS

	June 30, 2021	June 30, 2020
Cash and Equivalents	\$ 1,924,849	\$ 3,856,813
Investments	121,548,031	91,286,128
Pledges Receivable	287,000	188,211
Charitable Lead Trust Receivable	146,057	121,455
Fees Receivable	-	153,523
Prepaid Expenses	32,094	34,299
Cash Value of Life Insurance	473,136	505,942
Other Assets	73,200	-
Property and Equipment	1,218,884	1,256,145
Total Assets	\$125,703,251	\$ 97,402,516

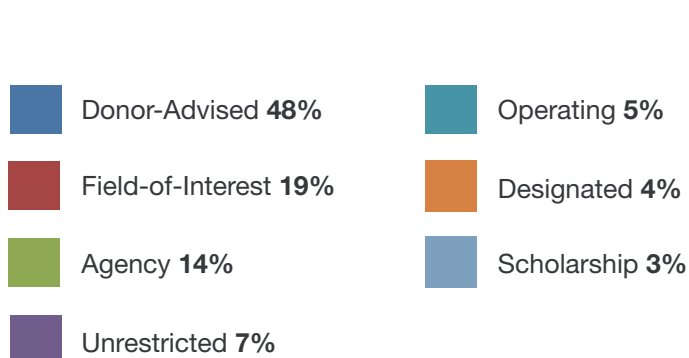
LIABILITIES AND NET ASSETS

Liabilities

Agency Funds	\$ 24,401,241	\$ 18,071,527
Annuity Payable	70,586	90,451
Accrued Expenses	117,341	77,653
Other Liabilities	-	174,300
Total Liabilities	\$ 24,589,168	\$ 18,413,931

Net Assets

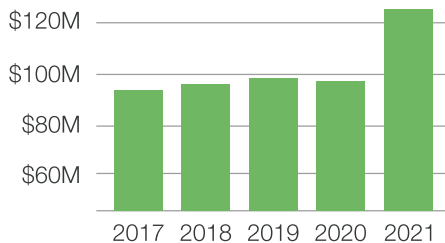
Without Donor Restrictions	\$ 16,098,587	\$ 13,463,417
With Donor Restrictions	85,015,496	65,525,168
Total Net Assets	\$101,114,083	\$ 78,988,585
Total Liabilities and Net Assets	\$125,703,251	\$ 97,402,516



Statement of Activities

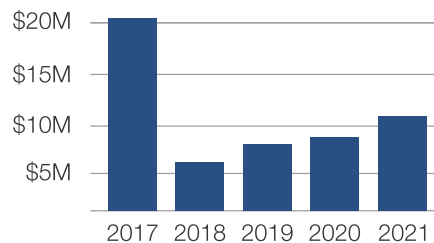
	Without Donor Restrictions	With Donor Restrictions	Total FY 2021	FY 2020
Revenue				
Gifts, Bequests, and Grants	\$ 1,518,808	\$ 8,703,824	\$10,222,632	\$ 7,769,826
Net Investment Gain	2,844,714	17,912,047	20,756,761	(496,889)
Investment Income	11,676	1,379,923	1,391,599	1,550,159
Fee Revenue	150,648	-	150,648	177,615
Net Assets Released from Restrictions	8,505,466	(8,505,466)	-	-
Total Support and Revenue	\$13,031,312	\$19,490,328	\$32,521,640	\$ 9,000,711
Expenses				
Grants Awarded	\$ 8,658,723	-	\$ 8,658,723	\$ 8,814,664
Grantmaking Activities	596,178	-	596,178	633,058
Management and General	603,719	-	603,719	569,319
Fundraising	537,522	-	537,522	588,222
Total Expenses	\$10,396,142	-	\$10,396,142	\$10,605,263
Increase (Decrease) in Net Assets	\$ 2,635,170	\$19,490,328	\$22,125,498	\$ (1,604,552)
Net Assets - Beginning of Year	\$13,463,417	\$65,525,168	\$78,988,585	\$80,593,137
Net Assets - End of Year	\$16,098,587	\$85,015,496	\$101,114,083	\$78,988,585

Assets



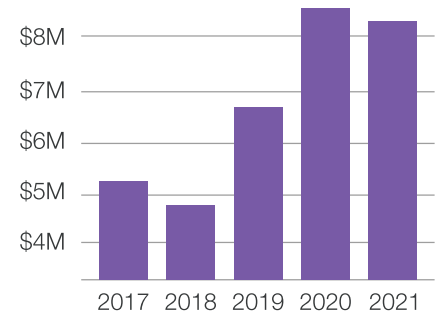
FY17	\$ 87,821,181
FY18	\$ 94,927,711
FY19	\$ 98,928,275
FY20	\$ 97,402,516
FY21	\$125,703,251

Contributions



FY17	\$ 21,137,341
FY18	\$ 5,947,801
FY19	\$ 7,019,619
FY20	\$ 7,769,826
FY21	\$ 10,222,632

Grants

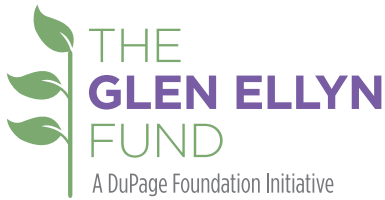


FY17	\$ 5,163,818
FY18	\$ 4,819,615
FY19	\$ 6,756,791
FY20	\$ 8,814,664
FY21	\$ 8,658,723

The fiscal year 2021 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/financials.

DuPage Foundation Highlights of FY2021

First Grant Awarded From *The Glen Ellyn Fund*



In July, 2020, *The Glen Ellyn Fund*, DuPage Foundation's newest geographic field-of-interest

fund, awarded its first round of funding to the Glen Ellyn Park District for a new "Sustainable Garden Initiative." The project, proposed by the park district's environmental commission, created two permanent demonstration gardens to inspire and inform visitors to Lake Ellyn and Village Green parks.

Named a Top 25 Foundation in Chicagoland

In August, 2020, DuPage Foundation ranked 23rd on the list of the top 25 Chicagoland foundations, according to *Crain's Chicago Business*.



Development Officer Kait Balseweicz Honored by WSPN

In August, 2020, **Kait Balseweicz**, development officer, was honored as West Suburban Philanthropic Network's 2020 *Nonprofit Rising Star of the Year*.

Dave McGowan a Featured Speaker at Frida Kahlo Event



In March, 2021, Foundation President & CEO **Dave McGowan** was a featured speaker at the College of

DuPage Foundation's fundraiser, "For the Love of Frida," an event to support the *Frida Kahlo: Timeless* exhibit. DuPage Foundation sponsored the exhibit, which ran June – September and brought in an estimated \$8 million to the County.

Renewed Accreditation Status Through Community Foundations National Standards Board



Excellence. Accountability. Impact.™

In April, 2021, DuPage Foundation successfully renewed its accreditation status with the Community Foundations National Standards Board. Since 2009, when the program was first developed through the Council on

Foundations, DuPage Foundation has adhered to the operational guidelines set forth in *The National Standards for U.S. Community Foundations®*. The program certifies U.S. community foundations that meet and exceed federal and state law requirements in practice and by policy.

Partnership Launched With the *Daily Herald*



A partnership between DuPage Foundation and the *Daily Herald* began in May, 2021, with the launch of an article series titled, "Leaders & Legacies: Stories of Local Impact," to highlight the history behind many beloved

DuPage County treasures and their philanthropic roots. Through her research, **Alice Wood, JD**, director of gift planning, tells the stories of local people who made a difference by leaving lasting legacies for generations to enjoy.

Foundation Staff

DuPage Foundation staff members share a common purpose of giving back to the community and advancing the work of the Foundation to benefit DuPage County and its residents.



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 Officer
Downers Grove



Mindy Saban
Director of Communications
Darien



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



Barbara S. Szczepaniak
Vice President for Programs
Elmhurst



Deborah L. Venezia
Director of Arts DuPage
Naperville



Karen L. Vicary
Office Manager
Elmhurst



David A. Weisz
Vice President for Finance
Carol Stream



Matt S. Wilson
Accounting Associate
Westchester



Alice M. Wood, JD
Director of Gift Planning
Naperville

“

“Congratulations on a great year! Thank you for all that you and your team did to support so many organizations this past year!”

-Mike Briggs, president & CEO, Little Friends, Inc.

DuPage Foundation IF[®]

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

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Electronic Service Requested

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



Excellence. Accountability. Impact.™

