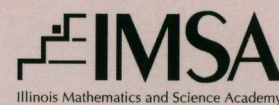


2005

ANNUAL REPORT TO OUR DONORS

IMSA Fund for Advancement of Education



# High Five! in '05



# What is IMSA?

The Illinois Mathematics and Science Academy® is an internationally recognized pioneering educational institution created by the State of Illinois to develop talent and leadership in mathematics, science and technology. IMSA's advanced residential college preparatory program enrolls 650 academically talented Illinois students in grades 10-12. Nearly 19,000 teachers and 43,000 students in Illinois and beyond have benefited from IMSA's professional development and student enrichment programs. Located in Aurora in the high-tech corridor west of Chicago, IMSA serves the people of Illinois through innovative instructional programs, public and private partnerships, policy counsel, action research, and the leadership and achievements of its graduates.



# What is IMSA Fund?

The IMSA Fund for Advancement of Education is a 501(c)(3) not-for-profit corporation organized for the benefit of, to perform the functions of, or to carry out certain charitable, educational, literary and scientific purposes of the Illinois Mathematics and Science Academy. The IMSA Fund solicits, receives, invests and administers gifts, grants and other contributions from the private sector (individuals, corporations, foundations and other organizations) to support IMSA's mission and work.

# Thank You



Dear IMSA Fund Donors,

The promise of the Illinois Mathematics and Science Academy® is now practice as visionary IMSA graduates forge new frontiers in Illinois and beyond in science, technology, engineering, mathematics and other fields, and as more and more students, educators and schools in our state, nation and world benefit from IMSA programs, products and services.

The Academy's reach, impact and success is due in no small part to the support it receives from the IMSA Fund for Advancement of Education – thanks to you.

You and other donors help in various ways. **Annual gifts** of all amounts provide essential operating support for the IMSA Fund and help IMSA meet needs that simply cannot be funded in other ways. **Major gifts and planned gifts** support significant opportunities and help the IMSA Fund invest and grow its resources for the future. Corporate and foundation **grants** fund specific projects of interest to IMSA and the funder.

Developing world-class talent and leadership in math, science and technology requires vision, commitment, persistence, courage and creativity. It also requires resources. We are proud to support IMSA as donors to the IMSA Fund, and we thank you for joining us in making a winning institution even stronger.

High Five! in '05,

Michael J. Birck  
**President**  
*IMSA Fund for Advancement of Education*

Stephanie Pace Marshall, Ph.D.  
**President**  
*Illinois Mathematics and Science Academy*

# How do donors make a difference?

Donors help students and educators achieve their dreams, seed innovation and ensure “margin of excellence” resources, support unexpected opportunities and emergency needs, increase IMSA’s financial flexibility, provide funds for IMSA programs and IMSA Fund operations, and back services for and by alumni.

# Donors Make Good Things Happen



High Five! in '05:

## As a result of the generosity of donors to the IMSA Fund:

- IMSA students received scholarships to offset enrollment fees, to present their work and network with peers and experts from around the world at prestigious research conferences, and to assist with college expenses.
- New programs were initiated, such as **IMSA TALENT** (Total Applied Learning for Entrepreneurs) which supports our next generation entrepreneurs, students who have ideas for new technologies or new applications of existing technologies that can benefit our state, nation and world.
- Illinois elementary and middle school students engaged in unique after-school and summer enrichment programs that stimulated their interest and increased their skills in math, science and technology.
- Educators at IMSA, in Illinois and beyond enjoyed innovative professional development programs and services that increased their capacity.
- Campus facilities were upgraded to address important living and learning needs.

High Five! in '05:

## Sample Highlights:

- The IMSA Fund established its first named college scholarship for an IMSA graduate, the Mary Van Verst Love of Science Scholarship, with a multi-year major gift commitment from the Van Verst family. Mary, who died in 2004, served with distinction, courage and grace as a member of IMSA's faculty from 1987-2004.
- Grants from the Lloyd A. Fry Foundation, ComEd, An Exelon Company, and Underwriters Laboratories, Inc., supported IMSA Excellence 2000+; a new grant from BP supported IMSA Kids Institute®.
- Toyota Motor Sales, U.S.A., Inc. donated a 2005 Toyota Sienna van for primary use by IMSA's outreach and residential student programs.
- Step Builders enjoyed a reception and hands-on science activities in IMSA's new science labs.
- Kaleidoscope Society members enjoyed a brunch and program at Brookfield Zoo, featuring IMSA science faculty member John Thompson and an IMSA alumni/student panel discussing their research on wolves - research that led to a new exhibit at the Zoo.

# What is the Kaleidoscope Society?

The Kaleidoscope Society consists of leadership donors whose lifetime giving to the IMSA Fund totals \$10,000 or more. Members of the Kaleidoscope Society, as of June 30, 2005, numbered 157 strong.



# Fiscal Year 2005

## Kaleidoscope Society

### **Violet Society - (\$1,000,000.00 + )**

The Grainger Foundation  
The Harris Family Foundation

### **Indigo Society - (\$500,000.00 + )**

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Anonymous Business Leader  
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Hansen-Furnas Foundation, Inc.  
IMSA Alumni Association  
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IMSA Parents Association  
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Toyota USA Foundation

### **Green Society - (\$100,000.00 + )**

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### **Orange Society - (\$25,000.00 + )**

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# Who are the Step Builders?

Step Builders are the donors to the IMSA Fund in a given fiscal year. The IMSA Fund is grateful for the support of 724 Step Builders in fiscal year 2005.

# Fiscal Year 2005 Step Builders Giving Club

In this report we recognize donors to the IMSA Fund for Advancement of Education during the fiscal year July 1, 2004 – June 30, 2005. While we carefully prepared this donor list, we recognize that errors may have occurred. Please accept our apology if your name is not properly represented and contact IMSA's Office of Advancement at 630-907-5040 so that our records can be corrected.

*We would also like to acknowledge donors who made payments in FY05 on major pledges recorded and recognized in previous fiscal years.*

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Asher Moshe Kach '97

Mr. Benjamin Kanters and Mrs. Mary Novak  
Vijay Karunamurthy '96  
Forrest and Helen Keaton  
Jim and Marlene Keenan  
Jim and Jean Keeney  
Chuck and Lynne Keller  
Mike and Denise Kenealy  
Joseph J. Kestel '91  
John and Kathleen Kiener  
Mr. Hyun Kim and Mrs. Bok Kim  
Toshio Kimura '95  
Mr. and Mrs. Teodozjy Kolasa  
George and Dava Kondiles  
Jordan Koss '89 and Susan Kim Koss  
Stephanie D. (Rankin) Krafft '00  
Collin L. Krepps '00  
Ben Lai '99  
Constantine Andrew Lales '01  
Michael and Carolyn Langan  
The Larkin Family  
Mr. and Mrs. Branson Lawrence  
Paula and George Leifheit  
Claudio and Sharon Levato  
Joshua S. Levin '96  
Helen Lin '91 and Chieh T Cheung  
Dr. and Mrs. Meth Linwong  
Alan Linchuan Liu '99  
Joseph '94 and Julie Liu  
Andrea Llenos '00  
Denise L. Lorenz '99  
Nikki Lowery '93  
Steven Lucy '02  
Kuanchung and Linyaling Ma  
Paul and Elizabeth Mackenzie  
Mr. and Mrs. Raymond A. Magee, Sr.  
Alan Magerkurth '94  
Chala and Dhana Maripuri  
Saugar Maripuri '99  
Justin B. May '94  
Robin May '90  
Carey L. '90 and G. Allen Mayer '90  
Marilyn McConachie  
Deborah A. McGrath  
Brad and Teena McWilliams  
Timothy A. Messer '00  
Linda Meyer  
The Mill Race Inn  
Ms. Patricia J. Miller  
Zachary C. Miller '95  
Brian Mirous '96  
Todd D. Mitchell '92  
Hemendra and Hansa Momaya  
Ash '94 and Bree Morgan  
Stanley G. Morris  
Teresa Moryl  
Dan Mueth '90  
James S. Murdoch '90  
Vishesh Narayan '00  
John and Jonel Near  
Naresh Nohria  
Clair Null '97  
Dr. Luis Nunez  
Sue Oland  
Jason J. Orloff '90  
Gary and Cindy Orwig  
Glenn and Sue Ouellette  
Jane K. and John T. Overstreet  
Jessica C. Pahlter '93  
Grace Park '05  
Julie H. Park '01  
Susan Pasnick '96  
Jeff Pasqualucci '00



Mary B. Patterson  
 Brian Peithman '96  
 Robert Allen Petersen '94  
 Mr. and Mrs. Paul E. Peterson  
 Jamie Pflasterer '94  
 Michael and Lori Pflugmacher  
 Theresa Phillips '91 and Kreishan Loay  
 Peter Ping and Susan Liu  
 William and Yvette Plattos  
 Mr. and Mrs. Richard Polanek  
 Joseph and Laurel Pollentier  
 Jenna Colby Pollock '98  
 Jennifer L. Poulsen '03  
 Chintana Puangsuvan  
 Danielle Pyevich '91  
 Soochon Radee '93  
 Richard E. Ramsey  
 James Randall '94  
 Deborah Linksvayer Rash '94 and John Rash  
 Lawrence and Leona Rawlings  
 Debra F. Reardanz '90 and Bruce Reardanz  
 Sendhil Revuluri '90  
 Sindhu Revuluri '96  
 Charles Rickert '98  
 Beth and Alan Riley  
 Dr. Susie W. Rockway  
 Darwin and Elaine Rodgers  
 Noah Rosenberg '93  
 Christina Rosenmeier '93  
 George and Magda Roth  
 Carolyn and Steven Roys  
 Mr. and Mrs. Wayne A. Rudolph  
 Mary McCann Rugg  
 Mr. and Mrs. Pedro R. Salazar  
 Charles Saletta '93  
 Mike and Judi Salkas  
 Sarah Sanders '01  
 SBC  
 David H. Schaefer  
 Travis Schedler '98  
 Peter and Heidi Moll Schoedel  
 Elaine M. Schuster  
 Sarah Jane Scott '97  
 C.L. and L.T. Sears  
 Polina Segalova '01  
 Amanda-Kathryn Shanbaum '96 and  
 Ben Shanbaum  
 Tony Sheng's Family  
 Debby Shepard '91  
 Mike and Tamara Shibayama  
 Mukunda and Roshani Shrestha  
 Bruce Slimp and Catherine Brennan  
 Michael and Claudia Sloan  
 Patrick Sloan and Donna Augustyn-Sloan  
 Al Russell and LuAnn Smith  
 Robert and Cynthia Smith  
 Margie Markey Snyder '00  
 Dr. Christine J. Sobek  
 Cliff '92 and Jennifer Sodergren  
 John Sosa '99  
 Lynn E. Sosa '94  
 Source One Office Products  
 M. Leigh Spencer '98  
 Austin T. Spread '96  
 Sanagavarpu Srikanth  
 Mr. and Mrs. John Stanton  
 Philip R. Stanton '03  
 Jon and Cheri Stewart  
 Howard and Susan Stock  
 Angela and David Stolzoff  
 Andrew Stout '99  
 Larry and Judy Strain

Jeffrey M. Strang '91  
 Ray and Sharon Stukel  
 Christopher T. Sukhaphadhana '97  
 Kelly McArdle Sulo '01 and Bledi Sulo  
 Scott Sundheim '93 and Rachel Sundheim  
 Scott David Swanson '90  
 Eva Sweeney '94  
 Meghan Tadel '95  
 Daniel and Jeanne Tang  
 Adam Taylor '90  
 Nancy Tayui '89  
 Christopher A. Tessone '00 and  
 Susan E. Massey '01  
 Deepti Mody Tolia '95  
 Andrew M Torres '98  
 Joe and Marilyn Tournier  
 Juris and Velga Turlais  
 Jennifer Lanette Urbauer '98  
 Alan Van Pelt '95  
 Carl and Lisa VanCamp  
 Ray and Marcia Vaughn  
 Daina R. Vitrungs  
 Steven and Patricia Volkman  
 Geeta R. Wadhvani  
 Dave and Lori Wakeman  
 David Alan Walker '00  
 Lyn Miller Wancket '99  
 Dr. Guoping Wang and Mrs. Hexia Xu  
 Tse L. and Marjorie Wang  
 Sarah Warning '01  
 Mr. and Mrs. Robert Wasson  
 Shannon Watson '92 and Charles R Watson  
 Audrey Wells  
 Aaron Wenzel '99  
 Mr. and Mrs. Mark West  
 Carol Westbrook  
 Bayly Wheeler '00  
 Michael R. Wilson '94  
 Molly Wilson '02  
 Adrienne Winans '99  
 Vifda Winans  
 Mark Witt '01  
 Arthur M. Wojtowicz '02  
 Bill and Pat Wombacher  
 Tom Wondra and Kellyanne Justen-Wondra  
 Pius D. Wong '01  
 Nicole Marie Wood '90 and Jeffrey T. Pittman  
 Jason Yi Wu  
 Ding Xie and Hou Ning Yu  
 Mr. Victor Xie and Mrs. Tina Liu  
 Michael and Leah Xu  
 Xiaoliang Xu  
 Christina Yee '95  
 Jessica L. Yokley '99  
 Anna Yusim '95  
 Cindy Zeissler  
 Ami A. Zeman  
 Adelaide X. Zhang '95  
 Mr. Xiaojun Zhang  
 Xiaotian Zhang and Jing Li

#### Gift-in-kind Contributions

Arbor Management, Inc.  
 Banek's Restaurant & Catering  
 Bell Tech.logix  
 Mr. and Mrs. G. Thomas Castino  
 Barton and Carol Corley  
 Crown Trophy-Aurora/Montgomery  
 Elite Management Consulting Corp  
 IMSA Alumni Association (IAA)  
 IMSA Parents' Association Council (PAC)  
 Parents of Classes 2005, 2006 and 2007

Dr. Stephanie Pace Marshall and Mr. Robert  
 Marshall  
 The Mill Race Inn  
 Jill D. Mosshamer  
 Douglas Pratt '97  
 SBC  
 The Honorable Jeffery D. and  
 Linda A. Schielke  
 Source One Office Products  
 Toyota Motor Sales, U.S.A., Inc.  
 Cathy and Bill Veal  
 Michelle and Andrew Whetstone

#### Memorial Gifts

*Memorial gifts are designed for a variety of  
 uses at IMSA, yet they all have a shared  
 purpose - to memorialize the loss of a family  
 member, friend or colleague. Gifts were  
 received in FY05 in memory of :*  
 Senator Forest Etheredge  
 Bernard Hollister  
 Javal Shah '04  
 Mary Van Verst

#### Matching Gift Companies

*The IMSA Fund thanks the following  
 corporations that matched gifts from  
 individuals in FY05:*  
 Abbott Laboratories Fund Matching Grant Plan  
 Allstate Giving Campaign  
 AMSTED Industries Incorporated  
 The Baxter International Foundation  
 Boeing Gift Matching Program  
 BP  
 eBay Foundation Matching Gifts Program  
 Exelon Corporation  
 Generations Fund  
 Google Matching Gift Program  
 Illinois Tool Works Inc.  
 Kimberly-Clark Foundation  
 Loiederman Soltesz Associates, Inc  
 The John D. and  
 Catherine T. MacArthur Foundation  
 Microsoft Giving Campaign  
 Pfizer Foundation  
 Plymouth Tube Company  
 PPL Corporation  
 Reader's Digest Foundation, Inc.  
 RLI Insurance Community Foundation of  
 Central Illinois  
 Sentry Insurance Foundation, Inc.  
 Takeda Pharmaceuticals North America, Inc.  
 Tektronix Foundation  
 Tellabs Foundation  
 TimeWarner Matching Gifts Program  
 Weyerhaeuser Company Foundation  
 WorldReach, Inc.

# Year-End Summary

	For the Year Ended June 30, 2004	% of total	For the Year Ended June 30, 2005	% of total	INCREASE (DECREASE)
<b>Program Support and Other Expenses</b>					
Program Services	\$1,463,040	96%	\$777,014	87%	
Supporting Services					
Fundraising	38,000	2%	29,111	3%	
Management and General	<u>27,684</u>	<u>2%</u>	<u>91,612</u>	<u>10%</u>	
<b>Total Expenses</b>	<b>\$1,528,724</b>	<b>100%</b>	<b>\$897,737</b>	<b>100%</b>	<b>(-41%)</b>

Total expenditures for the year ended June 30, 2005 decreased by 41% from 2004, a year when the IMSA FUND strategically used its accumulated assets to help IMSA recover from its unprecedented \$3.1 M budget reduction in FY03.

FY05 increases in management and general expenses were a result of increases in staffing and investment fees.

## Summary of Change in Assets Under Management

Beginning Balance	\$3,360,686		\$2,747,528		
Contributions, Pledges, Support	843,453		878,009		
Other Revenue	72,113		103,318		
Expenses	<u>(1,528,724)</u>		<u>(897,737)</u>		
<b>Ending Balance</b>	<b>\$2,747,528</b>		<b>\$2,831,118</b>		<b>3%</b>

Assets under management increased by 3% in the year ended June 30, 2005, a result of increased focus on fundraising to closest constituencies for unrestricted support. This increase was offset by a reduction in restricted contributions due to the end of the Major Gifts Campaign in FY04. Investment income also increased.

Of the \$2,831,118 in Net Assets, \$450,809 is available for the management and operations of the IMSA Fund and for IMSA needs that cannot be funded in other ways.

## Summary of Program Services

### Support for IMSA Academic/Residential Program

IMSA Great Minds - Dialogues	\$27,198
Student Recruitment, Retention, Leadership and Research	27,348
IMSA Kids Institute	14,032
Campus Facilities and Operations (Health and Safety Needs)	137,371
Alumni and Parent Associations	30,528
Other Program Salaries, Graduation, Meetings, Postage and Printing	<u>107,780</u>
	<b>\$344,256</b>

### Support for IMSA Outreach Program to Illinois Students and Teachers

IMSA Excellence 2000+ After-School Enrichment Program	213,523
IMSA Great Minds Program - Community Lectures	20,518
IMSA Kids Institute	21,047
IMSA Problem-Based Learning Professional Development for Illinois Teachers	165,985
21st Century Information Fluency/Other Professional Development	<u>11,685</u>
	<b>\$432,758</b>

### Total Program Services

**\$777,014**

## Summary of Contributions, Pledges and Support

Grants	\$599,285
Restricted Gifts	23,150
Unrestricted Gifts	<u>255,574</u>
<b>Total Contributions, Pledges and Support</b>	<b>\$878,009</b>

The IMSA Fund is audited by the Illinois Auditor General. For the year ended June 30, 2005, the IMSA Fund was issued an audit report with no findings. Amounts above are from the audited financial statements for the year ended June 30, 2005.



IMSA Fund for Advancement of Education  
Illinois Mathematics and Science Academy®  
1500 West Sullivan Road  
Aurora Illinois 60506-1000



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