SECURE a strong tomorrow

2001-2002 Report to Our Investors
In just over a decade and a half, the Illinois Mathematics and Science Academy* (IMSA) has become one of the premier institutions of its kind in our state, nation and world.

By any and all measures, IMSA is an unqualified success...a winner that works...a powerful model of what is possible when government, education, and the private sector come together to address important needs and challenges – in this case to develop talent and stimulate excellence in teaching and learning in mathematics, science and technology.

Much of IMSA’s success to date has been made possible by the generous support of our investors, including donors to the IMSA Fund for Advancement of Education. By investing in IMSA, you strengthen our capacity to help our state and nation address important problems such as the acute shortage of well-qualified mathematics and science teachers, the prevalent student achievement deficiencies and gaps in mathematics and science, and the critical need to build a highly skilled and scientifically literate workforce for the future.

Giving to the IMSA Fund enhances the academic, social and personal development of IMSA students, the leaders of tomorrow. Giving to the IMSA Fund helps provide exemplary professional development and motivating enrichment programs that increase the knowledge and skills of teachers and other students in mathematics, science and technology. Giving to the IMSA Fund leverages the State’s investment and signals to other potential investors that IMSA is worthy of their support. Giving to the IMSA Fund helps a strong institution grow even stronger.

In this annual report, we are pleased to share with you some highlights of the 2001-02 fiscal year. We appreciate your past support and as we look to the future, we hope you will continue to help IMSA – a winner that works – secure a strong tomorrow.

Sincerely,

Philip H. Francis, Ph.D.  
PRESIDENT  
IMSA Fund for  
Advancement of Education

Stephanie Pace Marshall, Ph.D.  
PRESIDENT  
Illinois Mathematics  
and Science Academy
Located in Aurora, Illinois, IMSA is an internationally-recognized pioneering educational institution created by the State to develop talent and stimulate excellence in teaching and learning in mathematics, science and technology. IMSA’s advanced residential college preparatory program enrolls 650 academically talented Illinois students in grades 10-12. More than 16,000 teachers and 23,000 students in Illinois and beyond have benefited from IMSA’s professional development and enrichment programs. IMSA serves the people of Illinois through innovative instructional programs, public and private partnerships, policy leadership and action research.

The IMSA Fund for Advancement of Education is a 501(c)(3) not-for-profit corporation that raises, invests and distributes monies from the private sector to support IMSA’s mission.

Contributions to the IMSA Fund support programs and services for IMSA students and staff, other Illinois students, and educators in Illinois and beyond; IMSA Fund operating expenses including ongoing donor cultivation and stewardship activities; and programs and services for IMSA alumni, parents and the general public.

Students hone their research skills in the Grainger Center for Imagination and Inquiry, made possible by The Grainger Foundation.
Development Highlights

- The IMSA Fund raised $2,303,082 in FY02.
- The number of donors to the IMSA Fund increased from 546 in FY01 to 865 in FY02. This included an increase in corporate donors (45 to 56), foundation donors (9 to 17) and individual donors (467 to 738).
- For groups of individual donors, the greatest increase was achieved by IMSA alumni - a 742% increase, from 24 to 178 donors.
- Five major gift commitments ($100,000+) were announced in FY02, led by a $500,000 commitment from the Andrew Corporation/Aileen S. Andrew Foundation of Orland Park, Illinois. The others were from Michael and Katherine Birck, The Chicago Community Trust, The Pritzker Foundation and The Ball Foundation.
- FY02 was the first full year of the IMSA’s Fund’s first Major Gifts Initiative. The initiative is designed to secure contributions from the private sector to help IMSA launch and expand its statewide programs and services for Illinois teachers and students. At the end of FY02, $2.8 million of the $7.2 million goal had been achieved.

Program Support Highlights

- The IMSA Fund awarded $715,297 to IMSA in FY02, primarily to support:
  - Enrichment Programs for Other Illinois Students - $280,342
  - Academic and Student Life Programs for IMSA Students - $145,389
  - Academy Infrastructure - $100,322
  - Professional Development Programs for Educators in Illinois and Beyond -$66,269
  - IMSA Great Minds Program® for Students, Teachers and the Public - $47,303

See page 4 for examples of these programs.
Special Events Highlights

Anniversary Gala and Birthday Celebration

• On April 27, 2002, the IMSA Fund hosted IMSA's 15th Anniversary Gala and Birthday Celebration at the Four Seasons Hotel in Chicago. This event paid tribute to Nobel Laureate and IMSA Resident Scholar Dr. Leon Lederman on his pending 80th birthday. Prominent business, scientific, education and government officials attended. Gala co-chairs were IMSA 1990 graduate Lt. Elizabeth Malecha, a Navy pilot and tactics instructor, and Robert H. Malott, retired chairman and chief executive officer, FMC Corporation, and a vice president of the IMSA Fund. Journalist Aaron Freeman served as the Master of Ceremonies.

Awardees

• Pioneer Award - John D. “Jack” Goeken, chairman and chief executive officer of The Goeken Group, and a founder of MCI

• Shining Light Leadership Award - Sheila MB Griffin, John H. McEachern Jr., James D. Pearson and Jesus “Manny” Sosa, the four founding members of the IMSA Board of Trustees still serving on the Board

Gala Sponsors

• The Alford Group Inc.
• The Boeing Company
• KemperLesnik Organization
• Rush-Copley Medical Center
• SBC Ameritech
• Winston & Strawn
• US Freightways

Dedication Programs

• The IMSA Fund sponsored the naming and dedication of Harris Hall (Residence Hall 1501) in honor of Neison and Bette Harris (Harris Family Foundation), and the dedication of Robert H. Malott’s stunning nature photographs now on display at IMSA.

Alumni Gatherings

• The IMSA Fund supported programs and services for IMSA alumni including Lumen 2002 (an annual discussion forum on important issues of the day attended by IMSA alumni, staff, selected students and local leaders), Alumni Day at IMSA, and Reunions for the Classes of 1992 and 1997.
Examples of Donor-supported Programs

Academic and Student Life Programs for IMSA Students

- Student inquiry and research opportunities in the Grainger Center for Imagination and Inquiry and Grainger Inventors’ Workshop and participation in the NATO Advanced Research Workshop
- Student leadership development training and programs, Richard L. Horwitz Lecture on Ethics (honoring IMSA seniors) and Bernard L. Hollister Leadership Lecture (honoring IMSA sophomores)
- Activities for various student groups (drama club, student newspaper, Madrigals, etc.), trips to see Madeleine Albright and the Lyric Opera’s Hansel and Gretel, and equipment for academic programs, athletic programs and the Titan Fitness Center

Enrichment Programs for Other Illinois Students

- IMSA Kids Institute® activities developed and led by IMSA students for Illinois students in grades 3-9, including summer science camps, the Real Science CD-ROM science magazine, and Saturday afternoon workshops
- Summer Enrichment for Academics in Mathematics and Science (SEAMS) for 9th grade students from underrepresented populations
- IMSA Excellence 2000+, an after-school enrichment program for Illinois middle school students, with professional development for their teachers

Professional Development Programs for Educators in Illinois and Beyond

- Bridges to Science Literacy, a program that helps Illinois teachers identify and clarify big ideas in science and underlying concepts in mathematics using the American Association for the Advancement of Science’s Project 2061 materials
- Problem-Based Learning Network, activities that help teachers in Illinois, other states and several counties increase student motivation and learning through the use of well-designed “messy” real-world problems
- Educational materials for IMSA’s Internet Toolkit services and teacher network activities to perform action research in their classrooms

IMSA Great Minds Program® for Students, Educators and the Public

- Frontiers of Educational Technology Dialogue for Illinois superintendents, technology coordinators and school media specialists
- Community lectures by Admiral William E. Owens and Alfred Berkeley, vice chairman of NASDAQ
- Seminars for IMSA students with renowned leaders in science, business and other fields, and the unveiling of Portraits of Great American Scientists, a book written by IMSA students and a peer from Batavia High School

Bill Draper and Jane Calvert, educators from Hillsboro Junior High in southern Illinois, prepare IMSA Excellence 2000+ materials for their students during professional development activities at IMSA.
Program Support and Other Expenses

- Program Services: $715,297 (81%)
- Supporting Services:
  - Fundraising: $104,219 (12%)
  - Management & General: $64,746 (7%)
- Total Expenses: $884,262

Enrichment Programs for Other Illinois Students: $280,342 (39%)
- Academic and Student Life Programs for IMSA Students: $145,389 (20%)
- Academy Infrastructure: $100,322 (14%)
- Professional Development: $66,269 (9%)
- Programs for Educators in Illinois and Beyond: $66,269 (9%)
- IMSA Great Minds Program for Students, Teachers and the Public: $47,303 (7%)
- Other: $75,672 (11%)
- Total Program Services: $715,297 (100%)

Summary of Change in Assets Under Management

- Net Assets 7/1/01: $2,640,206
- Contributions, Pledges and Support: $1,242,701
- Special Event Revenue: $64,687
- Other Revenue: $52,658
- Expenses: ($884,262)
- Net Assets 6/30/02: $3,115,990

Notes: Of the $3,115,990 in Net Assets, due to donor-imposed restrictions and decisions of the IMSA Fund Board of Directors, $364,309 is available to fund the management and operating expenses of the IMSA Fund as well as for unrestricted program support.

Amounts from audited financial statements for the year ended June 30, 2002.
Donor Recognition List
2001-2002

In this report we recognize giving of $125.00 and above during the fiscal year July 1, 2001 - June 30, 2002. Donors who make multi-year pledges are recognized during the fiscal year in which the pledge is made.

Titans - ($100,000.00 + )
Andrew Corporation / Aileen S. Andrew Foundation
The Ball Foundation
Michael and Katherine Birck
The Chicago Community Trust
The Pritzker Foundation

Trailblazers - ($25,000.00 + )
American Marketing Systems, Inc.
The Boeing Company
City of Aurora
SBC Foundation
Ms. Susan Snell Schanlaber
Mr. and Mrs. William J. White

Pioneers - ($10,000.00 + )
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Lancaster Family Foundation
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Dillon Foundation
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Mrs. Joanne Hansen
The Hansen-Furnas Foundation, Inc.
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US Freightways
Catherine C. and William J. Veal

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and Mrs. Joan Weinstein
Ms. Joset B. Wright

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.
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We also thank the 431 Friends who gave up to $125.00.
Matching Gift Companies
The IMSA Fund thanks the following corporations that matched gifts from individual investors in FY02:
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Allstate Foundation
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RLI Insurance Co. Matching Gifts
SBC Foundation
Tellabs Foundation
United Technologies
United Way of King County
USG Foundation
Yahoo! Inc.

Memorial Gifts
Memorial gifts are designated 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. Memorial gifts were received in FY02 to honor the following individuals:
Chester Glinka Kenneth Guest
Bernard Hollister Julie Namkung ’91

IMSA Office of Advancement
2002-03 Resource Development Staff
Catherine C. Veal, Vice President for Advancement
Christine Bodine, Director of Development for Corporate, Foundation and Government Grants
Support services provided by: Melissa Copp, Jill Mosshamer, Jane Overstreet and Susan Speigel.
The IMSA Fund gratefully acknowledges the contributions of Juan Bustamante, Marti Guarin, Jerre Henriksen, Paula Leifheit and Tina Yang to resource development efforts in 2001-02.

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In May 2002, the IMSA Board of Trustees proudly dedicated Residence Hall 1501 in honor of Neison and Bette Harris, generous supporters of the Harris Institute for Problem-based Learning, IMSA Excellence 2000+ and the IMSA Great Minds Program.
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