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.
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.


• 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 + )
Andrew Corporation and its employees
Anonymous Alumnus
Anonymous Business Leader
Lloyd A. Fry Foundation
Hansen-Furnas Foundation, Inc.
IMSA Alumni Association
SBC Foundation
Alfred P. Sloan Foundation

Blue Society - ($250,000.00 + )
Michael and Kay Brink
BP Caterpillar Foundation
Grand Victoria Foundation
The Hitachi Foundation
IMSA Parents Association
Mr. Robert H. Malott
Telatis Foundation
Toyota USA Foundation

Green Society - ($100,000.00 + )
Abbott Laboratories Fund
Albert Pick Jr. Fund
Amertech-Illinois
AMSTED Industries Incorporated
Anonymous Alumnus ’91
Apple Computer, Inc.
The Ball Foundation
Bell and Howell Information and Learning
Bell and Howell Foundation
Virginia B. Cherry
ComEd, An Exelon Company
Ford Motor Company Fund
IMSA Alumni Parents
Fred and Kay Kreibiel
Mr. and Mrs. James R. Lancaster
Michael McCool ’91
Pitney Bowes Corporation Charitable Foundation
Robert Pritzker (Pritzker Foundation)
The Searle Funds at The Chicago Community Trust

Yellow Society - ($50,000.00 + )
Anonymous IMSA Parents
3Com Corporation
Applied Computer Technology, Inc.
Archer Daniels Midland Foundation
G. Carl Ball
Susan Shell Barnes
Walter and Virginia Cherry
Dillon Foundation
Jean R. Finley
Fortune Brands, Inc.
Hamilton Sundstrand Corporation
Harris Foundation

IMSA Faculty and Staff
KemperLehrk
The Lehman Brothers Foundation
Lucent Technologies
The Lumpkin Family Foundation
Molex Incorporated
Motorola Foundation
Novell, Inc.
James D. and Marlene F. Pearson
Pyle Bros. Foundation
Precision Scientific, Inc.
Qvest Communications International, Inc.
Underwriters Laboratories, Inc.
William J. and Jane S. White

Orange Society - ($25,000.00 + )
3M Aurora Distribution Center
Ameren Corporation
The Aurora Foundation
Bell Laboratories Library
John F. and Carol Berger
The Boeing Company
Mr. and Mrs. G. Thomas Castino
The Chicago Community Foundation
Coopers and Lybrand
The Crown Family
Fifth Third Bank
The Forest Fund
W.W. Grainger, Inc.
Richard and Joanne Hansen
Dr. Stephanie Pace Marshall and Mr. Robert Marshall
The Meyer and Morris Kaplan Family Foundation
Mallinckrodt Veterinary, Inc.
William G. McGowan Charitable Fund, Inc.
Milken Family Foundation
NICO, Inc.
Mr. and Mrs. Donald E. Nordlund
Nortel Networks
Old Second Bancorp, Inc.
Rockwell Automation
S & C Foundation
The Seedlings Foundation
In Loving Memory of Javal Shah ’04
Toyota Motor Sales, U.S.A., Inc.
UOP
Donald C. Van Pelt, Jr.
Varlen Corporation
Waste Management, Inc.
Winston & Strawn Foundation

Red Society - ($10,000.00 + )
ABS Graphics, Inc.
Ameren/OPS
American Honda Foundation
Mr. and Mrs. Roger E. Anderson
The Associated Colleges of Illinois
AT&T
Aurora National Bank

Marjorie Craig Benton
The Grace Bersted Foundation
Best Buy Children’s Foundation
S & E Bramsen Foundation
Burroughs Welcome Fund
CBI Foundation
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The Cherry Corporation (Peter B. Cherry)
ChicagoFirst
Chicago Tribune Foundation
Samuel Choi ’89 and Karen Choi
Dr. Harry and Mrs. Sue Chung
Circle of Service Foundation, Inc.
ComCorp, Inc.
Corporate Development Associates
John Deere Foundation
Dr. Richard F. and Dr. Linda Y. Dodg
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Dr. and Mrs. Floyd English
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FMC Foundation
Dr. Philip H. and Diana Francis
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GTE Foundation
Illinois Corporation
Impact Ill, Inc.
Intel Science Talent Search
The Johnson Foundation
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Charles & Ruth Levy Foundation
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Reyes Holdings LLC
The Rocking JT Foundation
Rush-Copley Medical Center
Ed Saunders
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Seamaster Bearings
G. D. Seebe & Company
Samuel K. and Mary Jacobs Skinner
State Farm Insurance Companies
Philips Swagger Associates
In Loving Memory of Mary Van Varg
William A. and Mary VanSanten
Cathy and Bill Veal
Waigren Co.
Dr. Tito Yao and Mrs. Lilia Yao
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.

Andrew Corporation and its employees
The Ball Foundation
Mike and Kay Birck
S & E Bramsen Foundation
Mr. and Mrs. G. Thomas Castino
The Searle Funds at The Chicago Community Trust
Samuel Choi '89 and Karen Choi
Grand Victoria Foundation
Lancaster Family Foundation
Malott Family Foundation
Samuel K. and Mary Jacobs Skinner

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

Andrew Corporation and its employees
The Ball Foundation
Mike and Kay Birck
S & E Bramsen Foundation
Mr. and Mrs. G. Thomas Castino
The Searle Funds at The Chicago Community Trust
Samuel Choi '89 and Karen Choi
Grand Victoria Foundation
Lancaster Family Foundation
Malott Family Foundation
Samuel K. and Mary Jacobs Skinner

Trailblazers - ($25,000.00 +)
ComEd, An Exelon Company
Lloyd A. Fry Foundation
Toyota Motor Sales, U.S.A., Inc.
Underwriters Laboratories, Inc.

Pioneers - ($10,000.00 +)
Anonymous (2)
BP
ChicagoFirst
Jean R. Finley
The Harris Family Foundation
Mr. and Mrs. Gregory K. Jones
In Loving Memory of Mary Van Verst

Benefactors - ($5,000.00 +)
3M Aurora Distribution Center
Barnard/Fain Foundation
The Brick Family Foundation
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The Crown Family
Dillon Foundation
Hansen- Fumia Foundation, Inc.
Richard and Joanne Hansen
Intel Science Talent Search
Fred and Kay Krehbiel
William G. McGowan Charitable Fund, Inc.
J.B. Pritzker Family Foundation
S & C Foundation
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Gloria Ysasi-Diaz and Andrew A. Surasky
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Cathy and Bill Vahl
William J. and Jane S. White

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Ariel Capital Management, LLC
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Dr. Usha Warrior
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Bruce and Joan Winston
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Ron and Janice Zange

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Mr. and Mrs. Bob Houston
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Hidenciri ilija and Marie Denise Cormier
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IMSA Alumni Association (IJA)
IMSA Parents’ Association Council (PAC)
Illinois Association for Supervision & Curriculum Development
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Eric and Elizabeth Willard
Dan and Angela Woods Family
Curite and Thuya Wright
Jichuan Yin and Jing Lin Li
Dave and Gina Zager
Matthew Robert Zanon '97
Lou and Temi Zearing Family

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Cindy Almblade '00
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Margaret J. Anderson '00
Chris '94 and Denise Andreoli
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Eric and Elizabeth Willard
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Curite and Thuya Wright
Jichuan Yin and Jing Lin Li
Dave and Gina Zager
Matthew Robert Zanon '97
Lou and Temi Zearing Family
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Chintana Prangsvan
Danielle Pyevich '91
Socchon Rades '93
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James Randall '94
Deborah Linkswayer Rash '94 and John Rash
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Sindhu Revuluri '96
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Christina Rosenmeier '93
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Sarah Sanders '01
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Meghan Tedel '95
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Velda Winans
Mark Witt '01
Arthur M. Wojtowicz '02
Bill and Pat Wornbach
Tom Wondra and Kellyanne Justen-Wondra
Pius D. Wong '01
Nicole Marie Wood '90 and Jeffrey T. Pitman
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 Youmi '98
Cindy Zeissler
Ami A. Zeman
Sarah Zeissler
Jessica L. Yokley '99
Christina Yee '95
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 Youmi '98
Cindy Zeissler
Ami A. Zeman
Sarah Zeissler
Mary Van Verst
Dr. Stephanie Pace Marshall and Mr. Robert
Marshall
The Mill Race Inn
Jill D. Mosher
Douglass Pratt '97
SBC
The Honorable Jeffery D. and
Linda A. Schieke
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 Hollister
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
Alistate 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.
Kimball-Clark Foundation
Loiederman-Soltész 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
Santry Insurance Foundation, Inc.
Takeda Pharmaceuticals North America, Inc.
Tektronix Foundation
Tellabs Foundation
Time Warner Matching Gifts Program
Weyerhaeuser Company Foundation
WorldReach, Inc.
Year-End Summary

Program Support and Other Expenses

<table>
<thead>
<tr>
<th></th>
<th>For the Year Ended June 30, 2004</th>
<th>% of total</th>
<th>For the Year Ended June 30, 2005</th>
<th>% of total</th>
<th>INCREASE (DECREASE)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program Services</td>
<td>$1,463,040</td>
<td>96%</td>
<td>$777,014</td>
<td>87%</td>
<td></td>
</tr>
<tr>
<td>Supporting Services</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fundraising</td>
<td>36,000</td>
<td>2%</td>
<td>29,111</td>
<td>3%</td>
<td></td>
</tr>
<tr>
<td>Management and General</td>
<td>27,684</td>
<td>2%</td>
<td>91,612</td>
<td>10%</td>
<td></td>
</tr>
<tr>
<td><strong>Total Expenses</strong></td>
<td><strong>$1,528,724</strong></td>
<td><strong>100%</strong></td>
<td><strong>$897,737</strong></td>
<td><strong>100%</strong></td>
<td><strong>(-41%)</strong></td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th></th>
<th>Beginning Balance</th>
<th>Contributions, Pledges, Support</th>
<th>Other Revenue</th>
<th>Expenses</th>
<th>Ending Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Beginning Balance</strong></td>
<td>$3,360,686</td>
<td>$843,453</td>
<td>72,113</td>
<td>(1,528,724)</td>
<td>$2,747,528</td>
</tr>
<tr>
<td><strong>Contributions, Pledges, Support</strong></td>
<td>843,453</td>
<td>878,009</td>
<td>103,318</td>
<td>(897,737)</td>
<td>$2,831,118</td>
</tr>
<tr>
<td><strong>Other Revenue</strong></td>
<td>72,113</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Ending Balance</strong></td>
<td>$2,747,528</td>
<td></td>
<td></td>
<td></td>
<td>$2,831,118</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Program Activity</th>
<th>Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>IMSA Great Minds - Dialogues</td>
<td>$27,198</td>
</tr>
<tr>
<td>Student Recruitment, Retention, Leadership and Research</td>
<td>27,348</td>
</tr>
<tr>
<td>IMSA Kids Institute</td>
<td>14,032</td>
</tr>
<tr>
<td>Campus Facilities and Operations (Health and Safety Needs)</td>
<td>137,371</td>
</tr>
<tr>
<td>Alumni and Parent Associations</td>
<td>30,528</td>
</tr>
<tr>
<td>Other Program Salaries, Graduation, Meetings, Postage and Printing</td>
<td>107,780</td>
</tr>
<tr>
<td><strong>Total Program Services</strong></td>
<td><strong>$344,256</strong></td>
</tr>
</tbody>
</table>

Support for IMSA Outreach Program to Illinois Students and Teachers

<table>
<thead>
<tr>
<th>Program Activity</th>
<th>Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>IMSA Excellence 2000+ After-School Enrichment Program</td>
<td>213,523</td>
</tr>
<tr>
<td>IMSA Great Minds Program - Community Lectures</td>
<td>20,518</td>
</tr>
<tr>
<td>IMSA Kids Institute</td>
<td>21,047</td>
</tr>
<tr>
<td>IMSA Problem-Based Learning Professional Development for Illinois Teachers</td>
<td>165,985</td>
</tr>
<tr>
<td>21st Century Information Fluency/Other Professional Development</td>
<td>11,885</td>
</tr>
<tr>
<td><strong>Total Program Services</strong></td>
<td><strong>$432,758</strong></td>
</tr>
</tbody>
</table>

Summary of Contributions, Pledges and Support

<table>
<thead>
<tr>
<th>Source of Contributions</th>
<th>Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grants</td>
<td>$599,285</td>
</tr>
<tr>
<td>Restricted Gifts</td>
<td>23,150</td>
</tr>
<tr>
<td>Unrestricted Gifts</td>
<td>256,574</td>
</tr>
<tr>
<td><strong>Total Contributions, Pledges and Support</strong></td>
<td><strong>$878,009</strong></td>
</tr>
</tbody>
</table>

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