



# Lilly Endowment Annual Report 2015

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## About Lilly Endowment

Lilly Endowment Inc. is an Indianapolis-based, private philanthropic foundation created in 1937 by three members of the Lilly family – J.K. Lilly Sr. and sons J.K. Jr. and Eli – through gifts of stock in their pharmaceutical business, Eli Lilly and Company.

The gifts of stock remain a financial bedrock of the Endowment. The Endowment, however, is a separate entity from the company, with a distinct governing board, staff and location.

In keeping with the founders' wishes, the Endowment supports the causes of community development, education and religion. The Endowment affords special emphasis to projects that benefit young people and that strengthen financial self-sufficiency in the nonprofit, charitable sector.

The Endowment funds programs throughout the country, especially in the field of religion. Its founders' foremost priority, however, was to help the people of their city and state build better lives. Accordingly, the Endowment maintains a special commitment to its hometown, Indianapolis, and home state, Indiana.

Lilly Endowment  
Annual Report  
2015

# Embracing Traditions. Engaging New Ideas.



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**J.K. LILLY SR., ENCOURAGED HIS SONS, J.K. Lilly Jr. and Eli Lilly – with whom he founded the Endowment in 1937 – to be conservatively progressive. That philosophy was evident in their establishment and administration of the Endowment. Subsequent Endowment leaders have interpreted “conservatively progressive” to mean that the Endowment should act from two contrasting convictions: that tradition is an important resource and that innovative approaches are often necessary to respond fully to new challenges and circumstances.**

OVER THE YEARS, THESE CONTRASTING CONVICTIONS have framed the Endowment’s grantmaking in the three areas of concern its founders determined it would support: community development, education and religion. From United Way organizations to religious denominations and seminaries and from museums to colleges and universities, the Endowment regularly supports traditional, longstanding charitable organizations. It recognizes the significant impact they have had and continue to have on the quality of life of those they serve. There is much about them that remains valuable. Virtually all of these organizations, however, are operating in quickly changing contexts. At times they face forces and trends that could undermine their impact and relevance and for some possibly even their existence. They need encouragement and funding to develop and execute strategies necessary to be effective in these changing contexts.

The stories in this annual report feature Endowment grants that are helping traditional organizations develop and pursue new ways to increase the scale and improve the quality of their impact. The stories depict how the Endowment seeks to help enhance the effectiveness and expand the reach of the organizations and programs it funds after assessing the lessons

learned from earlier efforts. These lessons typically indicate what should be maintained, where modification and enhancement are recommended, and where whole new strategies are necessary. By adopting this approach to our grantmaking, we believe we are acting in a conservatively progressive manner consistent with that espoused by J.K. Lilly Sr.

**The report’s stories illustrate:**

**How the success of Purdue University’s** Discovery Park, which was launched with a \$25.6 million Endowment grant in 2001 as a new model for interdisciplinary engagement, encouraged the Endowment to approve a \$40 million grant to the Purdue Research Foundation for a major initiative to build the capacity of and encourage collaboration between Purdue’s College of Engineering and its Polytechnic Institute.

**How the Endowment applied lessons learned** from its Initiative to Promote Opportunities Through Educational Collaborations for Indiana’s 39 colleges and universities to a competitive initiative of the United Negro College Fund (UNCF). A \$50 million Endowment grant to UNCF will help historically black and predominately black colleges and universities throughout the country strengthen college-to-career pathways.

**How a 2015 Endowment grant is helping Girls Inc.** of Greater Indianapolis extend a successful outreach model that has enabled it to serve many more girls through Girls Inc. affiliates across Indiana.

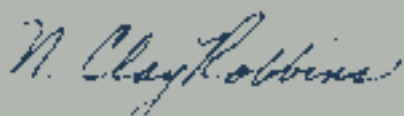
**How United Way Worldwide** is using a \$6.6 million Endowment grant to help United Ways across the nation develop and execute strategies that address giving trends it learned about in part from an Endowment-funded research collaboration between United Way Worldwide and the Lilly Family School of Philanthropy at Indiana University.

**How the Endowment's experience** with an initiative it began in 2007 to help clergy in Indiana face and overcome financial challenges that hamper their ability to lead congregations effectively encouraged the Endowment to launch a national effort to help pastors across the country with similar challenges.

**How the success of National Geographic Sacred Journeys**, a groundbreaking exhibition on world religions at The Children's Museum of Indianapolis created in partnership with the National Geographic Society, encouraged the Endowment to approve major grants in 2015 to strengthen for the long term the interpretation of religion in American life at the Smithsonian Institution's National Museum of American History and its National Museum of African American History and Culture.

We are most fortunate to interact with so many grantees that continually seek to improve the quality and expand the impact of their organizations and programs. They inspire us, and we are privileged to be able to support their important work.

In closing, the Endowment is pleased to note the election in November of Jennett M. Hill to its board. The Endowment will benefit greatly from her wisdom, good judgment, relevant legal expertise and commitment to the causes it supports.



N. Clay Robbins  
Chairman, President and Chief Executive Officer

## *Remembrance*

It is with sadness that the Endowment notes the death of Thomas M. Lofton, the longtime chairman of its board of directors. Mr. Lofton died on June 19 at the age of 86. The impact of his more than 45 years of service to the Endowment is incalculable. A nationally recognized expert on the laws relating to tax-exempt organizations and the epitome of a lawyer's lawyer, he served as the Endowment's chief legal counsel when Eli Lilly was leading the Endowment. After retiring as a senior partner in the law firm of Baker & Daniels in 1991, he was elected vice chairman of the Endowment. In 1993, he was elected chairman, and he served as president from 1993 to 1994. During his 22 years as chairman, the Endowment paid grants totaling more than \$7 billion in support of education, community development and religion.

Mr. Lofton's unrivaled intellect, wisdom and profound sense of loyalty to the values of the Endowment's founders at all times were evident in his guidance of the Endowment's affairs. A man of deep Christian faith, it was important to him that each year a significant portion of the Endowment's grants supported people in need, and he personally mentored and helped countless individuals facing challenges in their lives. He is irreplaceable, and we miss him greatly. Because of his devotion to his alma mater, Indiana University, the Endowment was pleased to award a \$1 million grant in his honor and memory to the Indiana University Foundation for the benefit of The Lilly Library.



**Purdue University strengthens interdisciplinary efforts**

# Building on Collaboration



**Purdue University's acclaimed engineering** and technology schools have been hard at work doing what they do best: reimagining, enhancing and expanding. The focus: a new initiative to transform engineering and technology research and education. The initiative also will foster synergistic collaborations between engineering and technology disciplines to prepare students for employment environments where engineers and technology graduates must regularly work together.

Purdue is able to pursue this initiative thanks in part to a \$40 million Lilly Endowment grant. The largest cash gift to the university since its founding in 1869, the grant is designed to help Purdue complete a list of projects crucial to plans for transforming its engineering and technology schools. In doing so, Purdue wants to create a model 21st century program that better prepares students for a competitive workforce and creates a powerful engine to drive the Indiana and national economies.

At issue is the need for engineering and technology graduates who are innovative problem solvers. They must have exceptional skills in collaboration and communication and the ability to tackle the most pressing global problems in a vast array of fields, among them sustainable energy, environmental security, biosciences and infrastructure.

"This will make a difference, both in the number of graduates and in their quality," says Purdue President Mitch Daniels. "More students, better prepared – and more important research with global impact."

The initiative's interdisciplinary and collaborative features appealed to the Endowment because of the success of Purdue's Discovery Park, a multidisciplinary learning complex of 18 core research centers and institutes where faculty and students use interdisciplinary approaches to tackle a variety of global challenges. A \$25.6 million Endowment grant helped Purdue launch the park in 2001, which began with six diverse centers focused on life sciences, nanotechnology, cyber research, advanced manufacturing, public policy and



#### Projects funded by the grant:

- **The Maurice J. Zucrow Laboratories: \$5 million toward a significant expansion of the university's propulsion lab, including five new cells for the testing of jet, rocket and turbine engines**
- **The Flex Lab: \$13.5 million toward construction of 60,000 square feet of new laboratory space equipped and configured to accommodate research in an array of disciplines and to encourage collaboration**
- **The Bechtel Innovation Design Center: \$13 million toward construction of a facility to support the development, creation and testing of student projects**
- **Professional development at the Purdue Polytechnic Institute: \$3.5 million to help faculty members create carefully planned, project-oriented courses**
- **The Wilmeth Active Learning Center: \$5 million toward completion of an innovative new facility that will combine library, classroom and study spaces to encourage learning in both new and traditional ways**

entrepreneurship. In 2004, a second Endowment grant of \$25 million helped grow the park as it attracted new researchers, strengthened its internship program and continued to build collaboration across disciplines, including energy, oncology, engineering and systems management. Since its beginning, Discovery Park has generated more than \$1.15 billion in research support from government and private sector funding sources. More than 1,000 faculty researchers work in the park each year, and it has assisted in establishing more than 100 new companies. More than 1,250 disclosures, patents, licenses and options on intellectual property have been facilitated at the park, and more than 5,000 students have participated in the park's Certificate in Entrepreneurship & Innovation Program.

The Endowment's \$40 million grant is helping Purdue, which is the only university in the Big Ten conference that has both a college of engineering and a college of technology, further this interdisciplinary approach in these fields.

The Endowment's participation, Daniels said, has been the decisive ingredient necessary to push forward each project on the list.

Purdue's drive to evolve carries with it a sense of urgency. It stems, in part, from a 2012 finding by President Barack Obama's Council on Jobs and Competitiveness that U.S. universities must graduate 10,000 more engineers annually for the nation to stay competitive in the world economy. That year, Purdue committed to expanding its engineering faculty by a third among other steps to help meet the goal. In 2015, Purdue joined 121 U.S. colleges and universities with engineering programs to pursue the goal as part of the National Academy of Engineering's Grand Challenge initiative.

"Here at Purdue, with the Endowment's help, we will supply 5 to 7 percent of that challenge all by ourselves," Daniels says.

And it will do so while educating students in innovative ways that hone crucial workplace skills and emphasize hands-on experience.

#### Poised for takeoff at the Zucrow labs

Case in point: the Zucrow labs, inaugurated in 1946 near the Purdue airport to develop jet and rocket engines. For nearly seven decades, Zucrow has created one of the nation's most respected programs for developing and testing propulsion systems, even though the newest of its six buildings dates to 1965.

The Endowment grant, said Scott Meyer, managing director of Zucrow,



Construction projects are transforming spaces where students work collaboratively (opposite). Updated labs and other work spaces will benefit students and support innovation (below).



Carson Slabaugh, assistant professor of aeronautics and astronautics, is one of those new faculty members. Word of the Endowment grant broke the day before he interviewed for his job, and he knew Zucrow's plans would cement its position to foster groundbreaking research.

Because faculty and students at Zucrow work closely with a number of industry partners – including GE Aviation, Rolls-Royce and Siemens – keeping projects secure and separate from one another is imperative.

"It will make it a lot easier in so many aspects," says Andrew Pratt, a master's student from Fort Wayne, Ind. "The whole reason we're setting this up here is because we don't have anywhere to do it (in the test cell)."

Zucrow Labs are being expanded at Purdue (above), classrooms are becoming more collaborative spaces (opposite top) and professors are changing how they teach (opposite bottom).



Space also is the impetus behind plans for another project – the Flex Lab. But not just any space – carefully designed flexible space that researchers can use in any of the university's engineering and technology disciplines. Specifically, space that encourages cross-disciplinary work, which is a hallmark of Purdue's efforts to transform engineering and technology education.

Design for the building, which will be located in Purdue's Discovery Park, goes well beyond such basics. Planners have met with faculty from every engineering discipline – civil to nuclear – to incorporate diverse needs in the new facility, according to Robert Frosch, associate dean of engineering for resource planning and management.

In addition, the Flex Lab is being designed to encourage communication and collaboration. “With a lot of glass throughout, for example,” Frosch says, “there will be clear vision through the building so people will be connected instead of isolated.” Work cafes and other collaboration zones will be integrated into the design to take advantage of the fact that researchers from a variety of disciplines will be working in the same space.



That, Frosch adds, will create the potential for research breakthroughs that can propel Indiana's economy into the future.

### **A center for student creativity**

Purdue's commitment to prepare graduates who will strengthen Indiana companies extends to the Bechtel Innovation Design Center, as well. The new building, which will be centrally located and open around-the-clock, is being designed to help students plan and build projects arising either from class assignments or extracurricular activities, regardless of academic discipline.

The \$18.5 million Bechtel Center is named for Stephen D. Bechtel, Jr., a Purdue alum who co-owns Bechtel Corp., a global construction and engineering firm based in

San Francisco. The center's design is intended to pique curiosity and encourage students to mix and share ideas. That starts with large windows, Frosch says. "So, if you're walking outside, on the sidewalk, you might see things that can draw you into the facility and say, 'Hey, I want to be part of this.'"

The center will have multiple levels of resources: an atrium where teams will meet; a manufacturing lab packed with equipment and work stations; design areas on a second floor; and assembly and storage areas for long-term projects on a lower level. Its most intriguing feature may simply be gathering a critical mass of student creativity in one spot, where teams will work side-by-side on solar cars, electronics or other projects.



### **Guides by the side**

Intriguing things certainly are happening in the classroom of Patrick Connolly and Esteban Garcia Bravo. Connolly, a professor and department head, and Garcia Bravo, an assistant professor, both work in the Department of Computer Graphics Technology. Together, they teach a large, freshman-level class called Fundamentals of Computer Graphics and Foundations of Digital Imaging.

In years past, the course has been taught as two separate classes, heavy on traditional lectures and tests – what Connolly refers to as "the sage-on-the-stage" model. Today, that has been flipped, with most of the lectures recorded and posted online for students to view on their own. Then, class sessions include hands-on work, with instructors circulating among the students to coach, ask questions and provide feedback – a "guide-by-the-side" model.

"With this approach we saw a great opportunity to ask the students, 'Why don't we learn computer graphics by doing computer graphics?'" says Garcia Bravo.



During part of one recent class period, for example, students scrutinized graphics produced by their classmates and offered critical analysis of their classmates' work from across the room, including both praise and suggestions for improvement. As a graphics-enhanced photo of a campus building was shared, one student sniffed, "Hmph. Try finishing it next time." Another asked, "Did they even do anything with the background?"

Connolly says such candor is typical: "They have gotten to the level where they expect from themselves, and from each other, high-quality work much quicker than we had expected."

The design of the class is in keeping with the philosophy of the Purdue Polytechnic Institute, which is the new name for Purdue's College of Technology. It has been renamed and reimagined to emphasize project-based learning. Those principles are spreading among the Purdue faculty through professional development efforts – supported in part by the Endowment grant – including a student-centered initiative called the IMPACT program. As part of that program, faculty members redesign their courses with the end in mind: what students should know when the semester is over. But this approach is not merely focused on technical skills or academic knowledge. Students must know how to communicate better and collaborate with each other and their professors.

"Employers are saying, 'Hey, (graduates) have got to be able to work on a team, they've got to be able to communicate,'" Connolly says. "They can't sit over in the corner and wait for someone to tell them what to do.'" This tells Connolly that Purdue's compass is true: "We are definitely heading in the right direction."

Purdue deans are modeling collaboration as they shepherd these transformations. For Leah Jameison, the John A. Edwardson Dean of Engineering, and Gary Bertoline, Dean and Distinguished Professor of the Purdue Polytechnic Institute, the experience confirms what they have seen for years in their own research and teaching: multidisciplinary teamwork is essential for innovation and problem solving. Today the world faces challenges that demand rigorous cooperation, Jameison says. As she considers Purdue's commitment to educate more engineers who are prepared to tackle big problems in Indiana and beyond, Jameison knows her colleagues and students cannot work in isolation.

"We want a Purdue education to prepare students to be leaders in finding solutions that will help determine what kind of world we are going to live in for the next century and beyond," she says. "To do that, engineers cannot just work with other engineers."



For Dean Bertoline at the Polytechnic Institute, collaboration is about leveraging diversity. Engineers, computer scientists, game designers and information technology experts have different ways of seeing, thinking and knowing. For example, he said, when engineers tackle a problem they tend to seek novel solutions. In contrast, people in tech fields are more likely to explore what's been tried and modify the approach for better outcomes. No single way is the right way, he said. Innovative leadership comes when different approaches work together.

"When we collaborate in these new spaces on campus, in new courses and in shared research, we learn that there is real diversity of thought across our fields," Bertoline says. "This is the same diversity our students will be working with when they get to industry."

Purdue's library system is blazing a trail, too, with the \$44.5 million Wilmeth Active Learning Center. In 2015, it began emerging from a construction site near the iconic bell tower at the heart of campus. When completed in 2017, the Wilmeth



Purdue deans Gary Bertoline, left, and Leah Jameison, right, visit with an engineering student (above top). Libraries dean, James L. Mullins, gets an update on the new learning center (above bottom).



Center will combine Purdue's six science and engineering libraries into one building designed with a mix of classrooms and study and traditional library spaces. Designers gleaned ideas from visits to several libraries, including those at Duke and North Carolina State universities, and Purdue's own experience as the IMPACT teaching program has gained traction.

### Reaching around the globe

As significant as they believe the efforts supported by the Endowment's grant will be for students, Purdue officials also want to be sure these efforts are noted for the impact they will have on the Indiana and national economies.

One international company that routinely recruits Purdue graduates is Rolls-Royce Corp., which has a large Indianapolis facility for designing, testing and building aviation engines. Phil Burkholder, president of Rolls-Royce Defense Aerospace North America, noted that Rolls-Royce has hired more than 300 Purdue grads since 2003 and finds them "exceptionally well-prepared for the workplace." Rolls-Royce has announced plans to house a research and development team in a new

The ever-changing demands of global companies, including those with a strong Indiana presence, mean that Purdue must continue to adapt. The transition to project-based teaching and toward a more integrated approach to research and innovation must reach students so that they can make a difference at Purdue, across Indiana and beyond.

"This is exactly the kind of experience we would be looking for – hands-on problem solving, along with excellent communications skills and demonstrated team work," Burkholder says. "Young engineers with that skill set would make great future Rolls-Royce employees."

What a handsome return on investment that would be indeed, for the university, the state and beyond.

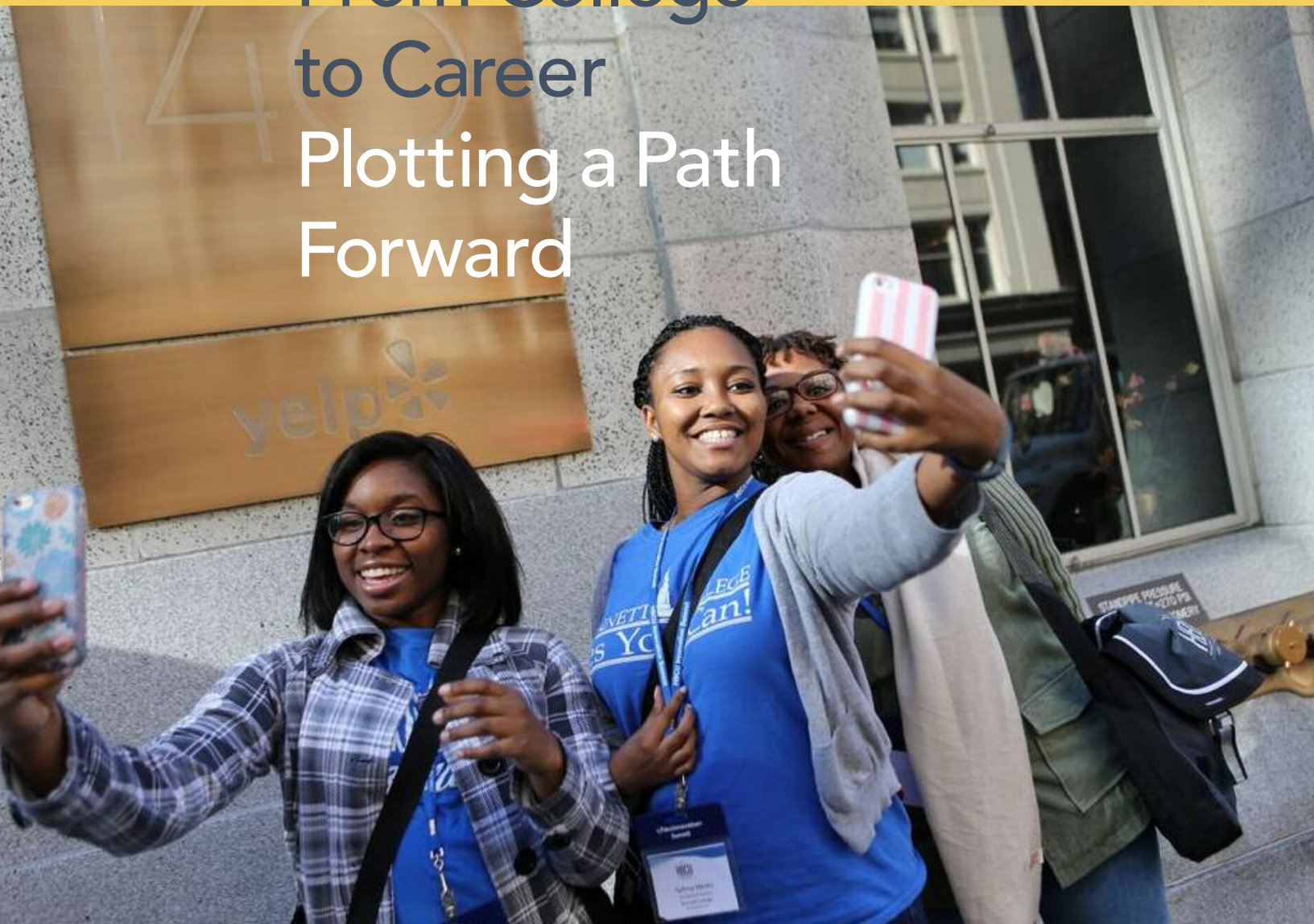


44,000-square-foot facility in Purdue's new aerospace district, which includes the Zucrow labs. In the facility, the company will develop and test jet engines, work with Purdue researchers and create a pipeline for Purdue graduates to employment opportunities at the company.



The Neil Armstrong Hall of Engineering is a cornerstone of Purdue University's efforts to remain at the forefront of engineering research and education.

# From College to Career Plotting a Path Forward



**Brian Bridges** vividly recalls the day a university admissions officer came to his grandmother's house in rural South Carolina to walk him through the baffling college application process. His SAT scores – the highest for an African American student in his high school graduating class – had touched off a flurry of interest from top-tier colleges and universities across the country. "I had never heard of some of them," he admits. "I was the first in my family to attend college. I didn't have anyone to guide me. I didn't know the possibilities."

He opted for Francis Marion University, a state school within a two-hour drive from home and with a predominantly

black enrollment. The experience was positive, his grades were excellent, but "no one told me I should do an internship or apply for a co-op program," he says. Unfamiliar with the career-planning services on campus, he graduated in 1990 with a degree in English and ended up working as a bill collector. Not until Bridges returned to his alma mater and sought the advice of a career guidance counselor did he plot a path that led him to graduate school, a doctorate and a distinguished career in research. "Too many first-generation college kids assume that if they just persist and earn a degree, they're guaranteed a good job," he says.



Statistics confirm that it doesn't work that way, especially for those students of color who need help in navigating the unfamiliar territory of higher education.

Young African American graduates face formidable employment challenges. As recently as 2013, the unemployment rate for African American college graduates, ages 22-27, was 12.4 percent, more than twice the rate of their white counterparts. In 2014, the percentage of underemployed black graduates soared to 56 percent.

"A lot of these students come from low-income backgrounds," explains Michael Lomax, president and chief executive officer of the United Negro College Fund (UNCF). "They attend college to change their economic status and that of their families. It's a perverse outcome when they borrow significantly, go to school, work hard, and then can't get good jobs after they graduate."

### Improving the statistics

Supported by a \$50 million Lilly Endowment grant, UNCF has launched a comprehensive initiative to expand professional opportunities for graduates of historically black colleges and universities (HBCUs) and predominantly black institutions (PBIs). The Career Pathways Initiative "will encourage campuses to design structured experiences that will prepare students for a seamless transition to the world of work," says



Bridges, now vice president for research and member engagement at UNCF and overseer of the multiyear project.

Of the 87 HBCUs and PBIs eligible to apply for funding, up to 30 will receive planning grants and will compete for up to 24 implementation awards. Lomax and Bridges say schools participating in the initiative first will gather data about the professional status of their recent graduates. That information will serve as baselines to measure success as the schools develop, test and model programs aimed at improving alumni job statistics.

"This initiative will help us understand what is and isn't happening to our graduates in terms of meeting employment expectations," says Lomax. "Then we'll ask, 'What do we need to do to strengthen career outcomes? What technical skills are in demand?"

How do we teach the soft skills that help graduates build networks and fit into corporate cultures that are very different from what they've experienced at home or on campus?" He believes the answers to these questions will benefit not only minority-serving colleges and universities but any post-secondary institution interested in improving its graduates' employment prospects.

"Our goal is to work with students, faculty, colleges, alumni and employers to better connect the student experience with the jobs of the future," he says.

### Overcoming obstacles to success

Lomax and his UNCF team are well aware of the challenges they face. "The situation is complicated," explains Charlie Nelms, retired chancellor of North Carolina Central University, professor emeritus at Indiana University and a consultant to the Career Pathways project. He points out that many students enter HBCUs and PBIs underprepared for college work. "Often they come to campus disproportionately educated in urban and rural districts where the achievement levels are far lower than they



Students visit Yelp headquarters in San Francisco as part of a UNCF-sponsored tour of Silicon Valley (opposite). UNCF Vice President Brian Bridges (above left) and UNCF President Michael Lomax (above top). Stronger advising and mentoring (above bottom) are part of the new campus efforts.





"The third reason I'm optimistic is that this is not a one-year project," says Nelms. "In order to create strong, sustainable opportunities for students, you have to change the culture of an institution, and you can't change a culture in a year."

### Building on the Hoosier model

The Career Pathways Initiative is loosely fashioned after the Endowment's Initiative to Promote Opportunities Through Educational Collaborations for Indiana Colleges and Universities. The

should be," he explains. "So they have a lot of catching up to do in a relatively short period of time."

The idea of choosing and pursuing a course of study that leads to a career is new to these students, and the temptation is to spend a year or two sampling random classes and ruling out various majors. This can deplete a family's budget and yield neither a diploma nor a job. "The solution can begin with familiarizing students with the campus career center during freshman orientation week," says Bridges. "Research shows that students who utilize career centers get jobs, but they can't wait until their senior year to do it."

Other problems aren't as easily addressed. Some HBCU campuses are located in less-populated areas that offer limited opportunities for business partnerships, mentoring programs and internships. Faculty members carry heavy academic loads and haven't always updated their curricula to meet the evolving needs of a global economy. At a time when corporate recruiters are looking for graduates with degrees in the STEM disciplines – science, technology, engineering and math – many minority-serving institutions tend to focus on the humanities. "A lot of these degrees don't have a vocational aspect to them," says Nelms.

In spite of these obstacles, Nelms describes himself as "unequivocally optimistic" that the UNCF initiative will have a positive and lasting impact on black college graduates. He cites three reasons for his confidence. "First, no one is dictating what the institutions must do," he says. "They're not taking a cookie-cutter approach. Each school has the opportunity to identify its areas of deficiency and address them." Second, he applauds the requirement that faculty and administrators must support and be actively engaged in executing the plans that they've designed. The responsibility for making their program a success isn't limited to the staff of the campus career planning office.

two projects share a goal of improving the job prospects of recent college graduates. The Indiana initiative, launched in 2003, reaches out to 39 Hoosier institutions, whereas the UNCF initiative reaches beyond – to schools in 19 states, the District of Columbia and the Virgin Islands.

"The Indiana initiative served as a model for us," says Angela Van Croft, director of foundation and corporate relations for UNCF, who worked with Brian Bridges to craft the Career Pathways Initiative. "But we took the idea and developed a program that is unique to us. We wanted to meet the needs of our schools and address the issues that our students face."

Both Van Croft and Bridges attended the 2015 meeting of participants in the Indiana initiative. They heard business executives discuss the skills that 21st century employers value. They sat in on workshops and learned about programs that certify students as "internship ready." They spoke with directors of career centers that have established advisory boards of off-campus experts to ensure that curricula are aligned with the needs of the marketplace. Bridges traded business cards with Jim McAtee, director of the Ball State University Career Center, and anticipates learning more about Ball State's "externship" program. It places faculty in business and other workplace settings to help them keep current within their academic disciplines.



Brianna Mills (above), Howard University graduate, says strong internships and advising helped her land meaningful work. Students from around the U.S. (opposite) take part in a UNCF career event in Silicon Valley.

Van Croft snaps her fingers to emphasize how quickly changes occur within careers that depend heavily on technology innovations. "Some of our schools are diamonds in the rough when it comes to the STEM disciplines," she says. "But others haven't always kept pace." She views participants in the Hoosier initiative as valuable resources for ideas to address this problem. "I hope to broker several conversations between Indiana schools and HBCU schools."

### Checking all the boxes

Many graduates of minority-serving institutions have already proven that the kind of programs that the Indiana initiative and the Career Pathways Initiative endorse yield outstanding results. In short, they work. Students who choose schools based on the majors they want and the professional development opportunities they need are highly competitive in the marketplace. Case in point: Brianna Mills, a 2009 graduate of Cathedral High School in Indianapolis and a 2013 honors graduate from Howard University, an HBCU campus located in Washington, D.C.

By the time Mills was a junior at Cathedral, she had applied to six universities, been accepted at five, and had drafted a wish list to help her choose her future alma mater. She knew she wanted a rigorous academic program at an affordable price, an urban location with a range of internship opportunities, and a campus population "where I would be surrounded by people who look like me." A road trip she took with her parents during spring break in 2008 convinced her that Howard University checked all the boxes. It had a strong business school, offered a favorable financial aid package, was close to scores of businesses and nonprofit organizations, and had a minority enrollment exceeding 90 percent. "Students call Howard 'the mecca' because it's like arriving home after a long journey," she says. "It's the place where you feel connected with your peers."

Her journey toward a meaningful career began on day one of freshman orientation week when she was introduced to the business school's expectations. Faculty encouraged her to do internships during the school year in the Washington, D.C., area and during summer breaks in Indianapolis. She took advantage of every opportunity that came her way. She managed social media activities at a start-up marketing firm in Maryland, coordinated community outreach programs at United Water in Indianapolis, analyzed statistical data for the Howard School of Business and served as a research intern

for the Indiana Chamber of Commerce. She attended professional development meetings on campus, always wearing the required business suit and high-heeled shoes.

"It became second nature to me," she says of the dress code. "Speakers would come in for information sessions, conduct mock interviews, and host dinners and luncheons. I had to create business plans and present them in class."



As I look back, it was a lot like boot camp. But in the end it helped a lot. I've seen it all, and I know how to navigate whatever might come up."

In November 2015, she returned to Howard University for a brief visit. "I was there by myself; it wasn't homecoming or any other special time," says Mills, who was recently promoted to senior associate content editor at a software company in California. "As I walked around campus, all sorts of memories came back. I felt so grateful. This was the school that shaped me for my adult life. It prepared me for all the challenges ahead." Although she now lives a continent away from her alma mater, she says, "It still feels like home."

Sacred Journeys

# Exhibit Invites Families to Explore World's Religions



Religious communities  
of ways to record,  
and act out their beliefs



NATIONAL  
GEOGRAPHIC  
SACRED  
JOURNEYS

"It's been a journey for all of us just creating this ..."

—Chris G. Carron, director of collections at The Children's Museum of Indianapolis





Visitors pause before captivating photographs. They see Hindu women in brilliant saris prepare red and yellow lota pots to float on the Ganges River in India. There is shimmering gold embroidery on the black silk draping the Kaaba in Mecca. There is Mary, the mother of Jesus, robed in a star-covered blue cloak, depicted as Our Lady of Guadalupe.

Each image offers a vivid invitation to explore religion, a subject rarely tackled by secular museums, let alone a museum for children. But The Children's Museum of Indianapolis did just that, creating the ground-breaking exhibit, National Geographic Sacred Journeys. During its run at the museum from August 2015 through February 2016, the exhibit encouraged some 165,000 visitors to consider extraordinary places and traditions sacred to people of different faiths throughout the world.

Nearly four years in the making, Sacred Journeys was made possible through a \$1.2 million Lilly Endowment grant in 2013. It was created in partnership with the National Geographic Society, which provided photographs that are central to the exhibit.

## Pilgrimages

According to a 2014 United Nations study related to The First International Congress on Tourism and Pilgrimages, an estimated 330 million people a year embark on journeys to the world's sacred places. To make that number both real and accessible to visitors, Sacred Journeys introduces visitors to five young people who meet in an airport as they begin their own distinct pilgrimages.

Luis, a Christian boy from Mexico, visits the shrine of Our Lady of Guadalupe and the Roman Catholic basilica in Mexico City. Micah, a Jewish-American boy, travels to the Western Wall in Jerusalem. Amala, a Hindu girl, goes to the confluence of three rivers in India sacred to her religion to purify her soul. Hana, a

Muslim girl from the United Kingdom, goes on hajj, a pilgrimage to Mecca in Saudi Arabia. An, a Buddhist boy from Vietnam, seeks guidance for his future at the Bodhi tree in Bihar, India, where Gautama Buddha achieved enlightenment.

Visitors travel, too, through the 7,000-square-foot exhibit's immersive environments, past video screens and National Geographic photography that reveal personal acts of faith, religious observances and family celebrations. Objects of devotion are on display throughout. Some have Indiana roots, including a Bible published in 1845 and

owned by Bethel African Methodist Episcopal Church, the oldest African American church in Indianapolis.

"Some items came from our own collection, some we commissioned or purchased, and others came from about 20 different lenders," says Chris G. Carron, director of collections at the museum. "Part of curating an exhibit like this is finding those things that have meaning for people and that tell the story."

Shortly after the exhibit opened to the public, Miranda Harrison of Monroe City, Ind., drove more than 120 miles with her three sons to see Sacred Journeys. "It's really one of the most well-done exhibits I have ever seen," she says.

Her 12-year-old, Logan, liked seeing aspects of his Christian faith displayed. "I thought it was really cool. I like the Jesus stuff," he says.

The replica of the Shroud of Turin intrigued her oldest, Austin, 15.



Some 165,000 children and adults toured Sacred Journeys (previous page and opposite) during its six-month run in Indianapolis.

Artifacts in the exhibition include:

- Fragments of the Dead Sea Scrolls from Qumran, Israel
- A replica of the Shroud of Turin
- A mezuzah (a piece of parchment inscribed with the Shema, a prayer from the Torah, held in a decorative case) and other Jewish devotional objects carried into space by former NASA astronaut David Wolf
- A 500-year-old handwritten Quran
- A stone from the Western Wall in Jerusalem
- The trunk that Mormon leader Brigham Young carried from New York to Utah
- A statue of Ganesh, Hindu god of good fortune
- Australian aboriginal art depicting "dream time" stories about the earth's creation

# Religion and the American Narrative

IN LIGHT OF THE CHILDREN'S MUSEUM'S SUCCESS with National Geographic Sacred Journeys, the Endowment began conversations in 2015 with the Smithsonian's National Museum of American History and National Museum of African American History and Culture about how they could strengthen their interpretation of religion in American life for the long term. These conversations led to a total of \$15 million in grants to support the following projects:

- **A \$10 million grant** will help the National Museum of African American History and Culture establish a Center for the Study of African American Religion. Located on the
- **A \$5 million grant** will endow a curator of American religious history at the Smithsonian's National Museum of American History and support religious history programs

National Mall and scheduled to open in 2016, the museum will be the first national museum dedicated to the interpretation of African American history and culture. A portion of the grant will endow a senior curator in religion, who will direct the new center. In 2010, the Endowment approved a \$10 million grant to the Smithsonian as a leadership gift for the national campaign to construct the National Museum of African American History and Culture.



"I really don't know what to think [of the shroud and its authenticity]," he says. "I want my dad to see it so I can talk to him about it."

In the tradition of The Children's Museum, the exhibit encouraged hands-on exploration. Families created stained-glass window art inspired by the Basilica of Our Lady of Guadalupe in Mexico City and mosaic patterns similar to tiles at the Dome of the Rock mosque in Jerusalem and put sticky notes on a global wall map to mark sacred places they have visited.

### Creating a safe place

Religion can be a source of comfort but also conflict, which concerned The Children's Museum staff in 2011 when it first considered the idea of this exhibit. Why would a museum known for entertaining and educating children and their families take on such a potentially contentious issue?

"Our hope is that we created a safe place for families to have conversations about what they believe and what their neighbors believe," Carron says.

"We may have grown up having been taught to avoid talking about religion, yet it is such an important topic. We wanted to open up a conversation that would instill respect."

As an institution that serves more than a million visitors each year, the museum



during a five-year period. Also located on the National Mall, it is the most visited history museum in the United States, attracting 5 million visitors and 18 million Web users annually. In recent years, leaders of the National Museum of American History have been exploring how to include religion more intentionally into their interpretation of American life.

These grants are part of the Endowment's commitment to increase public understanding of religion and the role that religion plays in shaping the nation and enriching the lives of individuals and their communities.

**"We are all about experiential learning, yet we wanted to be careful that we are not asking people to participate in something that is not part of their religious tradition"**

—Chris G. Carron

is intentional about creating family learning experiences, says Dr. Jeffrey H. Patchen, museum president and CEO. Those experiences have touched on challenging subjects before. Case in point: The Power of Children, a permanent exhibit. It introduces young audiences to Anne Frank, Ruby Bridges and Ryan White, children who made a lasting impact on the way people understand the Holocaust, racial segregation and HIV-AIDS. The success of The Power of Children – as well as a 2009 exhibit, Take Me There: Egypt, which touched on religious diversity in Egypt – prompted museum staff to consider exploring religion in a bigger way, Patchen says.

So museum staff approached the Endowment with the idea and received a planning grant, along with assistance in launching a series of consultations facilitated by Raymond B. Williams, LaFollette Distinguished Professor in the Humanities emeritus and professor of religion emeritus at Wabash College. Williams convened a group of religion scholars and religious community leaders that encouraged the museum to move forward. They endorsed a preliminary design for a non-proselytizing exhibit that would respect religious traditions and cultural diversity.

"Part of the wonderful thing about the advisors the Endowment referred us to was that they are not just academics but people who really understood our hope of fostering understanding and tolerance," Patchen says.

With that guidance in hand, the museum focused on five religions that the advisors agreed were most influential worldwide: Judaism, Christianity, Islam, Buddhism and Hinduism. Other religions are represented, too, in images and devotional objects.

Reflecting diversity and the distinctiveness of each tradition was critical, especially for a museum in the United States, one of the most religiously diverse nations in the world. Immigration produced this variety across the U.S., and Indiana continues to reflect it, according to Williams.

"Indiana is the crossroads of the country, and it has been a crossroads of religion from the very beginning," Williams says. "As people came through Indiana, they brought faith on their shoulders, and they continue to do so."

Another member of the advisory group was Sandy Sasso, an Indianapolis rabbi and author of several best-selling children's books about religion. She met with journalists from the PBS television series *Religion and Ethics Newsweekly* who came to Indianapolis to produce a story about the exhibit. Touring Sacred Journeys with the production crew, she said that explaining religion to children is critical because religion is part of their lives – and the world in which they are growing up.

"All children have an innate spirituality, and they like to ask the big questions. It's really we, who are adults, who are afraid of those questions," she said.

"It's very important for children to be able to confront these difficult issues because they see what's happening around the world on the news," she said.

"We can't really understand our culture, our civilization without understanding religion."

### Lasting impact

Photos chosen from the National Geographic Society archives provided a deep visual experience for visitors to Sacred Journeys, exposing wider audiences to images of religious practices that they may not otherwise see. The National Geographic Society found a "like-minded partner" with The Children's Museum in telling meaningful stories, according to Kathryn Keane, vice president of National Geographic Exhibitions.



Rabbi Sandy Sasso, who advised museum curators, says children have an innate spirituality and curiosity. Diverse images and artifacts from around the world engaged young patrons on both levels.

"The Children's Museum allows us to put our content into their educational settings," she says. "They know their audiences so well, and I think it's just a fabulous idea for a children's museum to take on the subject of the world's religions, its rituals and objects."

Sacred Journeys was designed to travel. In 2016 it will begin a four-month run at the Mayborn Museum at Baylor University in Waco, Texas. Yet the exhibit's impact at The Children's Museum will endure in Indianapolis. The Endowment grant allowed museum staff to create a smaller, permanent exhibit that will feature elements of different religious traditions on a rotating basis. Future international exhibits, such as those in the signature Take Me There series, will incorporate the religious dimensions of featured countries.

Sacred Journeys has paved the way for religion to be part of how children and their families explore the world. It's a journey that Osama Samir, a native of Egypt, entered enthusiastically when he toured the exhibit on a Sunday afternoon in fall 2015. He was there with his daughters, Basma, 13, and Noura, 10, and son, Yassein, 4.

Held in his father's arms, Yassein wasn't very interested. "He really wants to see the [museum's] trains again," Samir says, a bit apologetically. But the older children were engaged. "We like to see the places and cultures we don't know about," says Basma, a student at Fall Creek Junior High in Fishers, Ind. "It's very beautiful."

Samir and his family relocated to Indiana in 2014 for his job in drug development at Eli Lilly and Company. Sacred Journeys reflects the kind of diversity that Samir, who is Muslim, believes is good for his children, and society. "When you understand differences," he says "you understand people."



Money Matters

# Economic Challenges Facing Pastoral Leaders



When Rick Foss was bishop of the Eastern North Dakota Synod of the Evangelical Lutheran Church in America, he invited 28 pastors to talk candidly about money – or the lack of it. **“What I heard scared me to death,”** he says. The year was 1999, and Foss had become aware that veteran pastors were struggling to make ends meet, and seminary graduates were entering ministry with education debts that often exceeded starting annual salaries.



**Exacerbating the situation was a reluctance among clergy** to discuss personal finances with their congregations. Some were embarrassed to admit their belt-tightening efforts had failed; others were in denial, preferring to focus on everyone's needs but their own.

"Pastors don't complain," says Foss. "They have such incredible integrity. But the topic of money becomes the elephant in the room that they choose to ignore."

The conversation with his colleagues convinced Foss that the unwillingness to confront the elephant had a dangerous ripple effect. Not only did it threaten the stability of pastoral families, it also adversely affected the congregations they served and the Christian community at large. Ministry suffers when pastors are preoccupied with worry about soaring health insurance premiums, underfunded pension plans and the ever-present obligation to pay back student loans. Inadequate salaries sap the energy of clergy in the field and likely deter gifted persons from answering the call to ministry.

"I suspect some very fine people crunch the numbers, compare tuition costs with projected compensation and decide in the end that they can't make it work," says Foss. Consequently, "they never show up on our screen. We don't know they exist."

In response to the problem, Foss developed a comprehensive program to ease the financial burdens on church leaders in his jurisdiction. The plan was so successful that it became a model for similar projects across the country and, in 2007, contributed to the formation of Lilly Endowment's Initiative to Address Economic Challenges Facing Indiana Pastors. In 2015,

the Endowment expanded its work within and beyond Indiana by launching the National Initiative to Address Economic Challenges Facing Pastoral Leaders. An initial round of grants totaling more than \$28 million will support the efforts of a range of organizations including church-related institutions, denominational pension and benefits boards, synods, dioceses and foundations.

Recruited to serve as coordination director of the three-year project: Rick Foss.



## Grants Ease Budget Blues

Sheri Rohrer was worshipping in the sanctuary of the United Methodist Church in North Judson, Ind., when she heard the voice of God calling her to

pastoral ministry. "I was only 15," she says, "and I hoped he was talking to the person sitting next to me." But God wasn't.

Within a year, the nudge toward ministry became too persistent to ignore. On fire with her faith, Rohrer charted a career path that took her from college to seminary, to seven years as a solo pastor, and finally to a half-time assignment as pastor of marriage and family life at Delphi (Indiana) United Methodist

### Lifting the shroud of silence

"When I meet with congregation leaders to talk about the benefits, protections and compensations that clergy should have, I like to share a chart," says Louis Barbarin, chief executive officer of the Ministers and Missionaries Benefits Board (MMBB), a New York-based organization that serves more than 17,000 members across a range of denominations. "It shows the average compensation of a high school graduate, a college graduate, and someone with an advanced degree." Then he makes his point: "The salary of a pastor with a master of divinity degree or a doctorate in ministry, often falls somewhere between that of a high school graduate and a person who completed an undergraduate program."

As recipient of a \$1 million Endowment grant, the MMBB is developing programs aimed to improve the chart's bottom-line message. If successful, the organization's Financial Wellness Project will accomplish three goals that reflect the intent of the national initiative. It will:

- Reduce key financial pressures that inhibit effective pastoral leadership
- Strengthen the financial literacy and management skills of pastoral leaders through a variety of educational opportunities
- Lift the "shroud of silence" that stifles dialogue about pastoral salaries and benefits



Shari Rohrer (opposite) says her ministry is stronger because of the Indiana United Methodist Church's programs supporting financial literacy. Louis Barbarin (right) is developing a similar national program through MMBB, which is based in New York.



"We want to create a greater awareness within congregations so when lay leaders are discussing the compensation packages of their pastoral professionals they take into account the commitment these individuals have made in terms of education," says Barbarin. "We want the people in the pews to remember that pastoral families have the same dreams and aspirations that they do. Pastors deserve a decent roof over their heads and the ability to put food on the table. Like other parents in the congregation, pastors want to know their children are well taken care of and will have the opportunity to go to college."

Church. The schedule was perfect; it allowed her to balance her duties as a member of the pastoral staff with her life as a wife and mom.

But in 2011, Rohrer was suddenly sidelined with chronic back pain that mystified doctors, required months of tests and treatment, and wreaked havoc with her family's finances. She and her husband, Robert, depleted their savings and resorted to credit cards to stay afloat. "We incurred thousands of dollars

in medical debt," says Rohrer. "Worrying about the bills didn't help the situation. Some of the doctors said a huge part of the problem was stress-induced. We felt our life was spiraling out of control. We couldn't get a grip on things."

### The high price of service

Daniel Miller was considering a career as a teacher when he first felt the tug to ministry. "I got a sense in high school that being a pastor was what I was

supposed to do," he says. The feeling intensified after he enrolled at Anderson University, chose Bible and religion as his major, and completed an internship with Anderson's North Side Church of God congregation. Final confirmation came during a family trip to the Holy Land. "I was standing by the Sea of Galilee when it hit me hard. Right there, on the spot, I knew Jesus was calling me to serve." Scholarships helped him graduate from seminary without added



Of particular concern to MMBB are those ministers who serve in African American congregations. Research indicates that “they are more likely to have unpaid student loans, credit card debt and other problems that could affect their job performance,” says Barbarin. “They also tell us they are not saving adequately for retirement.” In response, MMBB plans to host a series of workshops designed for pastors and spouses within the National Baptist Convention USA, the largest predominantly African American Baptist group in the nation and fourth largest Protestant denomination. The program will include a coaching component, with financial experts checking in periodically with participating pastors.

“We want to make sure we engage young pastoral leadership,” says Barbarin. “We need to work with them as soon as they leave seminary and enter a congregation as a pastor, not when they are within three or four years of retirement.”

### **Our church is changing**

A similar emphasis on education is evident in the program designed by the Roman Catholic Archdiocese of Indianapolis, also a recipient of a \$1 million Endowment grant. The project, called Empowering Pastoral Leaders for Excellence, is intended to achieve results much like those reported by the United



debt, but several years into his pastorate at Kelley Crossing Church of God in Frankfort, Ind., he was still trying to retire his undergraduate loans and those of his wife, Jenny. The couple, now raising three children, delayed payments to Daniel’s pension fund and failed to adequately build their health savings account. “I became reticent about going to a doctor,” recalls Miller. “I found myself asking, ‘Can we afford this?’”

### **Lifting the burden of debt**

To ease the financial burdens on clergy such as Rohrer and Miller, Lilly Endowment launched the Economic Challenges Facing Indiana Pastors Initiative in 2007. The initiative included grants to help 16 denominational organizations across the state address a variety of challenges that impair pastors’ ability to lead congregations effectively. A significant part of the work included

creation of Ministerial Excellence Funds (MEFs). The funds – started with Endowment seed dollars – enabled judicatories to make grants to address individual pastors’ most pressing needs. The names that Indiana church leaders gave their MEFs indicated their intent. The Rejuvenate Fund offered Rohrer a fresh start. The Financial Freedom Fund helped Miller shed the burden of student loans.



### **"We're making progress, but..."**

In May of 2015 several leaders in the Indiana initiative met with leaders of the 28 grantees in the national initiative to share insights about best practices that emerged from the Hoosier project. Of particular interest to the newcomers were efforts to grow and sustain Ministerial Excellence Funds (MEFs). A key part of both initiatives, MEFs are started with seed money from the Endowment. When matched by donors,



"It was an answer to prayer," says Sheri Rohrer of a financial literacy and assistance program for United Methodist clergy in Indiana.



which can include congregational support, money from an MEF is used to address the specific needs of pastors. That could be helping to pay off a pastor's student loan or pay healthcare costs not covered by insurance. Since the launch of the Indiana initiative, more than 2,000 pastors and their families have received assistance through MEF grants and other support from their denominations.

"The joint session helped me put all of this, including the MEF, into context," says Dan Busby, president of the Evangelical Council on Financial Accountability (ECFA). His organization will use a portion of its \$750,000 Endowment grant to create new educational materials that will be available to fellow grantees. Whereas the ECFA has historically worked to upgrade the financial practices of large agencies and congregations, it now will reach out to smaller faith communities and individual clergy as well. The outreach will be multi-faceted and will include a wide variety of digitally based learning materials and webinars aimed at viewers with levels of expertise that range from fundamental to advanced.

"We're early in the planning stage, but we're confident that a huge difference exists between the needs of a church with 100 members and a church with 2,000 in attendance," says Busby. "Most of the resources on the Internet are aimed at large congregations. We want to fill the gap, and we've formed a national advisory committee of church leaders to help us do that." ECFA plans to offer "white labeled materials," which means organizations can customize them by adding introductory and closing paragraphs, graphics, photos or other signature elements.

Busby believes that exposure to the findings from the Indiana initiative and access to top-quality educational materials will give grant participants a jump-start toward achieving their goals. He speaks enthusiastically about the progress he has witnessed in his years of interacting with leaders of congregations, parachurch organizations and large national ministries. "The increase in learning opportunities has created a significant increase in financial literacy among pastors and lay leaders." Then he adds: "And yet, at the same time, we have a long, long way to go."

"The grant was a huge blessing," he says. "It started our family thinking about the future and helped us create some good savings habits."

Like all MEFs, the Rejuvenate Fund and the Financial Freedom Fund offered several learning opportunities to improve pastors' long-term budget-management skills. Rohrer met with a financial planner and enrolled in a clergy tax workshop. Miller invited a congregational lay leader to join him at a seminar that explored a

faith community's responsibility to care for its pastor. The benefits were immediate. "When financial burdens are lifted you have more energy for your family and your ministry," he says. Rohrer agrees: "I wasn't aware of it at the time, but I know now that I was on the path to burnout. When this grant came along it was almost like someone saying, 'Hey, we're going to help you get your life back.' And that's what happened."

# Girls Inc. Builds Confidence in Young Women

**Navigating the road to adulthood can be rough,** but it is especially challenging for girls experiencing bullying, depression, struggles with body image or academic problems.

These issues are all too familiar to the staff of Girls Inc. of Greater Indianapolis, who spend lots of time with girls in schools, summer camps and other community settings, according to Patricia A. Wachtel, president and CEO of the organization.



She points to *The Status of Girls in Indiana 2013*, a 60-page report from faculty and students at St. Mary's College in Notre Dame, Ind., which drew on publicly available statistics about Hoosier girls, ages 10 to 19. The report detailed demographic information, such as race and ethnicity, family income, as well as education and graduation rates and health and well-being indicators.

For Wachtel and her colleagues at Girls Inc., a concerning – but not surprising – fact stood out: Indiana girls experience a high rate of mental health problems. As many as a third of female students in grades 8 through 10 reported that they felt sad or hopeless. More than one-fifth of Indiana girls in eighth grade reported that they had considered suicide.

There is other troubling data. In Indiana schools, for example, 28 percent of high school females reported being bullied on school property in 2011, according to the Indiana Youth Institute.

While kids can make life miserable for each other by bullying, society also wields its weapons. Girls often feel pressured to conform to gender stereotypes and the media's narrow depictions of beauty, according to Wachtel.

"Society is tough on women and girls," she says. "A lot of what the culture tells us is that physical beauty is foremost in the qualities that women and girls should possess. Most of what we see is an ideal of beauty that looks nothing like real women."

So Girls Inc. of Greater Indianapolis responded, creating curricula to empower girls. "Work It Out" helps girls navigate friendship struggles, bullying and conflict resolution. A second program, "Redefining Beauty," helps girls confront body image stereotypes and identify healthy physical and emotional habits.



Girls Inc. of Greater Indianapolis is bringing its innovative self-esteem curriculum to girls at Indianapolis Public Schools' Arlington Woods School 99 (above and below).





A \$2 million Lilly Endowment grant in 2015 is enabling Girls Inc. of Greater Indianapolis to reach beyond its four-county area to reach girls in six more Indiana counties with positive messages: Girls have the right to have confidence in themselves and be safe in the world. Girls have the right to be themselves and resist gender stereotypes and accept and appreciate their bodies.

### **Bullying and body image**

Both issues – bullying and body image – contribute to low self-esteem. When a girl suffers from low self-esteem, she is more likely to engage in behavior that can undermine her health and overall wellness, as well as her academic performance and social relationships, Wachtel says.

“Work It Out” and “Redefining Beauty” are designed with developmentally appropriate activities and messages aimed at girls in three age groups: 6- to 8-year-olds, 9- to 11-year-olds and 12- to 14-year-olds. Girls Inc. of Greater Indianapolis staff and volunteers deliver the programs using



an outreach model: They reach beyond traditional Girls Inc. centers to bring the programs to schools and other community-based locations.

Girls Inc. of Greater Indianapolis has used this outreach model since 2009, when, assisted by an Endowment grant, the organization changed its strategic direction. Girls Inc. had operated two Indianapolis centers that served 600 girls each year. By adding an outreach model with neighborhood-based partners, in 2015 Girls Inc. brought



Understanding the needs of girls age 6 to 18 (above left and opposite), is at the heart of how Girls Inc. staff creates and evaluates programs and partnerships.

# Learning More About Girls



### **In summer day camp offered**

by Girls Inc. of Jackson County in Seymour, Ind., girls can learn science or opt for a cooking class. They can try CrossFit or take a wilderness hike. Girls Inc. staffers know from experience what girls

want. The organization has deep roots in this small, mostly rural community. But they are learning even more because of new technology that provides in-depth, age-specific information about the girls they serve.

Gathering that data is important for Girls Inc. staff who want to plan programs that engage girls, but it is also crucial in understanding what girls are experiencing outside the safe space that Girls Inc. provides, according to Kelly Royer, program director at the Jackson County affiliate.

“We know our girls, but sometimes they don’t tell us everything,” Royer says.

With the help of a 2014 Lilly Endowment grant, Girls Inc. of Jackson County and two other Indiana affiliates were beta test sites for new data management and analysis software adopted by Girls Inc.’s national organization.

The national organization is headquartered in New York and has offices in Indianapolis. Annually it serves more than 150,000 girls, ages 6 to 18, at 1,400 sites in 350 cities across the United States and Canada.

The new technology, Trax8, is a performance-management tool that provides detailed information about Girls Inc. interactions. How many hours do girls spend in programs? Who is mentoring them? How well is Girls Inc. meeting its goal of inspiring girls to be “strong, smart and bold?”

“We are really good at providing services to girls, but it’s also important that we be good at managing information,” says Judy Vredenburg, president and CEO of Girls Inc.’s



national organization. "We have to know for sure that we are making a lasting difference for girls and how we are making that lasting difference."

Since the beta testing phase in 2014, nearly half of Girls Inc.'s local affiliates are in some phase of adopting Trax8.

Social service agencies sometimes lag behind corporations in using data collection and evaluation for continuous improvement. But Girls Inc. aspires to be different, according to Cristin Rollins, director of research for the national organization.

"We've worked to make our mission statement measurable by using research-based indicators of positive youth development so that we can know and document the measurable difference Girls Inc. makes in the lives of the girls we serve," Rollins says.

Not that it has been easy for everyone. Adopting new technology can be frustrating and occasionally meets with resistance, Vredenburg says. For some affiliates, the software simply helps

with attendance. Other affiliates, such as the one in Jackson County, ask parents' permission to survey girls about bigger issues they may be facing, such as peer pressure.

In Jackson County, some of the confidential information shared by the girls in Trax8 surveys convinced Royer that she needed to provide girls with more education, such as "refusal skills" to help them resist peer pressure to use drugs, tobacco or alcohol.

Brenda Tracy, who recently retired as executive director of Girls Inc. of Jackson County after a 30-year Girls Inc. career, says introducing Trax8 made a difference in approaching prospective donors, too.

"We now have the data we need for program planning and for fundraising," Tracy says. "Our United Way and other funding organizations in our community are very impressed by the data Girls Inc. provides. Good data build that confidence."



Girls Inc.'s work at community sites, including Arlington Woods School 99 in Indianapolis, is allowing the organization to reach more girls and better understand their needs.

programs to nearly 3,800 girls at nearly 100 facilities, including 80 schools.

### School partners

On the east side of Indianapolis, Indianapolis Public Schools' Arlington Woods School 99 is a recent partner for the community-based programs.

Each Monday, 20 girls, ages 6 to 8, gather in a large multi-use space designated on this day for Girls Inc.'s "Redefining Beauty" program. Since it is



lunch and recess rolled into one, the girls are simultaneously eating, talking and moving. At one point, Girls Inc. staff member Denise Warnsby wraps up one activity to pull them into a circle and invite them to share positive beliefs about themselves.

"This is a good time to check in," she tells them. "What are some 'I can' messages?"

Nearly all the girls share something. "I can do math really well," one says. "I can help people when they are feeling sad," says another. They've already caught on to one of "Redefining Beauty's" messages: Real beauty isn't defined by outward appearances.

LaTasha Hudson, director of programs for Girls Inc. of Greater Indianapolis, says each session combines fun, games and activities and a consistent message of empowerment.





## **“Emotions have a lot to do with learning, and learning to maintain a positive attitude helps”**

—Joseph Jefferson, discipline dean at Indianapolis Public Schools’ Arlington Woods School 99

“We try not to compliment them on their hair or clothes,” Hudson explains. “They see and hear that message about beauty every day in society and from the media. Instead, we focus on other aspects of beauty. We tell them, ‘You’re a great listener’ or ‘You’re great at sharing.’”

“We’re planting seeds in these young girls,” Hudson says.

When Girls Inc. offered to bring its programs to Arlington Woods in 2015, teachers and administrators embraced the opportunity. The school serves primarily low-income students who face many challenges, according to Arlington Woods Principal Tihesha Guthrie.

The east side of Indianapolis, in many ways, is also a desert of opportunity, with few amenities for families such as community centers or recreation facilities, Guthrie says. Many families have transportation and financial issues that keep them nearly isolated.

“It hinders them academically,” says Karen Phelps, Arlington Woods literacy coach.

For budget-squeezed schools, providing enrichment beyond academics is difficult. Guthrie was familiar with the quality of Girls Inc. curricula through her work at a previous school, and the price was right. “Girls Inc. doesn’t cost us anything,” she says.

Joseph Jefferson, the discipline dean at Arlington Woods, helped make the connection with Girls Inc., hoping to find solutions to the discipline problems he sees among girls. Students who are frustrated with the daily challenges of school and problems at home have a difficult time staying out of trouble, Jefferson says. Reflecting on the impact of Girls Inc.’s presence in the school, he recalls one child in particular. She had a track record of discipline issues, but after being part of Girls Inc., she has emerged as a friendlier, happier student.

“Emotions have a lot to do with learning, and learning to maintain a positive attitude helps,” he says.

### **Spreading the message**

Like Arlington Woods, many schools are coping with problems beyond academics. Almost immediately after Girls Inc. of Greater Indianapolis began its outreach in 2009, schools in Indianapolis and in the other counties the organization serves began asking for programming that supports students emotionally.

“When we started, we thought the schools would want us to provide programs with a more academic focus,” Wachtel says. “What they sign up for in droves are the programs that provide that social and emotional education piece.”

The latest Endowment grant will help extend that reach beyond Indianapolis to Girls Inc. affiliates in Jackson, Jefferson, Johnson, Monroe, Shelby and Wayne counties. The six affiliates plan to roll out “Work It Out” and “Redefining Beauty” and expand the number of girls they

serve. The grant also will allow affiliates to deepen relationships with schools where they already work and build new partnerships with additional schools.

Girls Inc. of Shelbyville and Shelby County, located in southeast Indiana, is one of the affiliates that will benefit from the collaboration. In Shelby County, girls can come to the Girls Inc. center for programs, but the number of girls who can attend is limited due to space and transportation factors. Meanwhile, the popularity of the programs and the need for services are at an all-time high, says Amy Dillon, president and CEO of the affiliate.

Shelby County schools already embrace Girls Inc.’s “Preventing Adolescent Pregnancy,” and leaders there have asked for additional programming.

“The Lilly Endowment grant will allow our organization to reach even more girls in the coming years with a proven and effective service delivery model,” Dillon says. “Instead of the girls coming to our center for all of the programs, we can now go to them.”

The grant means that every fifth- and sixth-grade girl in Shelby County will participate in “Work It Out” and “Redefining Beauty” during the 2016-17 through 2018-19 school years.

By presenting “Work It Out” and “Redefining Beauty” before middle school, Dillon says girls have the best chance of reversing the effects of bullying and poor body image as they mature. By the time girls reach the seventh and eighth grades, they are ready for Girls Inc.’s “Preventing Adolescent Pregnancy” programming, she says.

“It is expected that these programs will help girls to stay the course, finish school, have more confidence and higher self-esteem, and be empowered to lead the positive lives that they desire,” Dillon says.

**"The baby boomer generation built United Way. Now 80 million boomers are headed out of the workforce, and about 80 million millennials are coming in. We have to figure out how to connect with this first generation of 'digital natives.'"**

—Brian Gallagher, United Way Worldwide

When donations to United Way of Metropolitan Chicago dipped dramatically at a Chicago-based company renowned for its generosity, a study of 21st century donors helped identify the reason. "Millennials don't want any part of an electronic fundraising campaign that involves multiple menus and steps," explains Brian Gallagher, president and CEO of United Way Worldwide (UWW). "And this company hires a ton of millennials."

In response to the declining numbers, company leaders partnered with UWW to develop "One-click Chicago" – a program that enables employees to learn about United Way's mission and pledge their support with a single keystroke. The results were immediate and gratifying. Giving among millennials increased by 94 percent, and the number of individual donors soared from 700 to almost 1,300. The success confirmed two widely held assumptions: Major changes are under way within today's workforce, and United Ways around the nation need to explore new strategies to engage and grow their donor base.

# United Way: As You Like It

IT'S A  
DO-GOOD  
TIME

Equally important is the need to maintain connections with those boomers who are departing the workforce and who risk slipping into what Gallagher calls the "lapsed donor" category. "These are folks who have given to United Way for 40 years but when they retire, we lose them because our relationship has always been through their employers. When we inquire, 'Why did you stop giving to United Way?' the most common answer we hear is, 'Because no one asked me.'"





### Making the appeal more appealing

All that is about to change. United Way Worldwide is applying what it learned from an Endowment-funded research collaboration with the Indiana University Lilly Family School of Philanthropy to study workplace giving trends throughout the country. Researchers learned that donors were interested in more connection to the causes they support and about the importance of providing immediate feedback to donors about how dollars are making a difference. Now, supported in part by a \$6.6 million Endowment grant in 2015, UWW has launched a three-year initiative to update and streamline its interactions with traditional and emerging donors.

John Lechleiter, UWW board chair and chairman, president and CEO of Eli Lilly and Company, endorsed UWW's grant proposal to the Endowment, and he is pleased to see how the initiative is evolving. "As a leader of a major pharmaceutical enterprise, I appreciate the importance of research and innovation," says Lechleiter. "United Way Worldwide's commitment to continual learning and improvement enables it to build on its strengths and thereby expand its impact and broaden its appeal to new donors. This initiative holds great promise for the future of United Ways across the country."

Under the initiative, a dozen large United Ways – United Way of Central Indiana (UWCI) among them – will serve as laboratories that will capture and catalog donor interests and preferences, create messages and opportunities based on those interests and preferences, and send personalized communications via the channels that donors like best. Local United Ways across the country will be able to access the data,



Lourdes Bonilla (above, left), an Indianapolis high school sophomore, and her United Way of Central Indiana mentor, Alexis Dean (above, right), visit an Indianapolis art gallery. Dean is part of Emerging Leaders, a United Way program.

tap into the technology and customize the market-tested messages that emerge from the initiative.

"Our society has changed in a big way," says Ann Murtlow, president and CEO of UWCI. "Those changes have been marked by advancements in technology that now make it easier to communicate with people on an individual level. United Way is all about bringing together people to solve big problems, and the way we do that in 2015 is very different than the way we did it 20 years ago."

She cites a recent "thank-you campaign" as an example. An email message, developed by the digital staff at UWW and tested by initiative participants, reached out to donors by name and with content that was tailored to each recipient. "The message was simple, conversational and relevant," says Murtlow. "People opened it quickly and clicked all the way through to a survey that asked them to share information about themselves and their interests. It included a write-in question that invited them to tell why they were engaged with United Way."

Future messages to these same donors will reflect and build on data that the survey collected. "Some people might be interested only in education or only in health, and they don't want to receive general information on everything else that we do," says Murtlow. "Our intent is to communicate with people where they are and about specific issues that concern them. We want to connect their passions with the work that needs to be done in their communities."

### Mobilizing millennials

In many ways, UWCI was an early leader in efforts to reach beyond traditional donors and cultivate a new generation of supporters. In 2006, a pair of recent college graduates accepted the challenge of co-chairing a get-together for friends at a trendy jazz club near the Butler University campus in Indianapolis. "Our goal was to get young professionals involved in the community through United Way and, at the same time, slow the brain drain in central Indiana," explains Lindsay Harmon, a private banker at the National Bank of Indianapolis, and one of the event's hosts. They hoped that as many as 50 people would attend. But three times that number turned out to hear their pitch. By the end of the evening, 137 young professionals had signed on as charter members of the group, which was aptly named "Emerging Leaders." Each person demonstrated support by agreeing to make an annual contribution of \$1,000.

"Everything about the Emerging Leaders surprised me," recalls Ellen Annala, who was president and CEO of UWCI at the time. "They established a steering committee,

designed their own program, asked for mentors and turned out in droves for service projects. I wondered if we could keep up with their energy. I also wondered if their interest would wane, but it never has."

Instead, participation has grown as members have continued to introduce innovative projects to address community needs. In 2015, the group organized a recruitment event and gave representatives of local youth-serving agencies five minutes each to summarize their missions and describe volunteer opportunities. Each Emerging Leader then had the opportunity to sign on with a group that stirred a personal interest.

In 2016, Emerging Leaders plans to introduce a new program called Chalk Talk. Fashioned after Ted Talks, it will



feature six Emerging Leaders who will make video presentations about their career paths. The videos will be made available to partnering K-12 schools for inclusion in their curricula. Teachers will have the option of inviting the presenters to interact with students about the educational requirements of their professions.

"Millennials want holistic experiences," says Katie Hammer, 2015 chair of the Emerging Leaders steering committee. "They want to be engaged, make an impact and serve as advocates for the organizations that they support financially."

### One size doesn't fit all

Whereas the Emerging Leaders organization is geared to volunteers under the age of 40, a more recently formed group called Link accommodates those Indianapolis professionals under the age of 30. It's an effort to connect with a younger set of millennials and to begin considering engagement with

the emerging Generation Z, people born since the mid- to late-1990s. The idea was developed and piloted in several cities participating in the UWW initiative and then was customized by UWCI. "We are an early adopter of the product," explains Murtlow. "We have been delighted with the response. Young people have welcomed the opportunity to network in a social setting and learn about the challenges in the community. We typically include some kind of work project, like assembling healthy snack packs for kids."

By dividing millennials into smaller, age-specific groups, UWW has discovered that what works with 35-year-old donors may be less successful with 20-year-old volunteers. In short, one size doesn't fit all. "We talk about the millennial generation as a big monolithic thing," says Gallagher, but differences in age, gender and location necessitate certain adjustments and tweaks. "This grant initiative allows us to use data to better understand individuals and their preferences."

The characteristic that is common to all millennials is their reliance on digital communication.

But even online preferences vary, with younger users quick to vacate one social media domain in favor of another. When baby boomers settled comfortably into Facebook, millennials fled to other sites. The challenge for United Way is to keep pace with change and know how to reach specific populations.

"Millennials want to do everything on handheld devices – not on paper and not on a desk top," says Gallagher. "This means the United Way experience has to be

compatible. Whereas the digital world is going at 80 miles an hour, we've been traveling at 55. The initiative will help us get up to speed."

Gallagher and his leadership team are optimistic about the anticipated outcomes of their efforts. Fast forward a few years and Murtlow predicts United Way will be perceived as a year-round experience that caters to people's individual interests. This perception will replace the dated image of a giant thermometer that appears once a year to track progress toward a financial goal. "People will have a greater understanding of the fact that we are a very strategic, community-impact organization as opposed to an organization that simply raises funds."



Emerging Leader Dan Reecer (above) is a literacy tutor volunteering with Indianapolis Public Schools. Katie Hammer (right) helped start the Emerging Leaders program of United Way of Central Indiana.



# Looking Back to Look Ahead

**As Indiana prepares for its bicentennial in 2016, two very different efforts are helping Hoosiers take stock and celebrate. One is encouraging students to see Indiana's history as part of the American story. The other is preserving forests, trails and wetlands so the people of Indiana can enjoy them in the next century and beyond.**

Both projects are reminders that a milestone such as the state bicentennial offers more than commemoration. It's a call to engagement that strengthens communities and builds citizenship, says James H. Madison, a member of the Indiana Bicentennial Commission and the Thomas and Kathryn Miller Professor Emeritus of History at Indiana University.

"The bicentennial is a time to stop and think, to look back over 200 years and consider where we came from and who came before us. What pathways did they create that still bind us? To think about our present. Where are we now?" Madison says, "And how does all of that help us consider another important question: Where do we want to go?"

One answer: Preserve and protect

Indiana's natural wonders for years to come. During his final state of the state address in 2012, former Indiana Gov. Mitch Daniels unveiled the Bicentennial



Nature Trust (BNT), seeding the project with \$20 million in state funds. BNT is helping Indiana purchase thousands of acres of forests, prairies, trails and wetlands so that they can become protected public land. In 2012, Lilly Endowment added to the initiative with a \$10 million grant to the Indiana Department of Natural Resources.

## **Protecting the land**

The Department of Natural Resources is using the combined \$30 million fund to

secure lands that will be protected from development in perpetuity for the enjoyment of all Hoosiers, according to Mark Becker, BNT's program director.

As of March 1, 2016, BNT has completed 101 projects in 48 counties, consisting of 9,735 acres. They include trail corridors, forests, river buffers and dune habitats. Some lands were donated. Many properties were acquired through the BNT program below market value. Each purchase required a \$1-for-\$1 match from other donors, including many individuals and local community foundations.

"The match has encouraged partnership and the leveraging of the fund as much as possible, but it also connects to these very strong community foundations," Becker says. "With many of the community foundations, conservation is a top priority."



A photograph of a red wooden covered bridge in a rural setting. The bridge is made of dark red wood and has a steep, gabled roof. It spans a small stream or ditch. The bridge is surrounded by trees with autumn foliage in shades of yellow, orange, and green. A dirt road leads up to the bridge, and a wooden fence runs along the side of the road. The scene is peaceful and scenic.

"(The parks) are rich storehouses of memories and reveries. They are guides and counsels to the weary and faltering in spirit. They are bearers of wonderful tales to him who will still listen; a solace to the aged and an inspiration to the young."

As BNT marks the state bicentennial, it invites appreciation for how Indiana commemorated its centennial in 1916. That's when Indiana's state park system was born. It, too, was a gift to the people of Indiana and has become one of the strongest state park systems in the nation. The first two parks – McCormick's Creek and Turkey Run – were the result of philanthropy. Indianapolis businessman Richard Lieber was inspired by the national parks movement, which led to the creation of the National Park Service, also in 1916. "He approached state officials with the idea of creating a state park," says Becker. "They said, 'Great idea. We will run it, but you have to go buy the land.' He raised private capital to make it happen. And at the bicentennial the people of Indiana are doing it again through the nature trust."

[illegible]

Indiana Historical Society President and CEO John A. Herbst commissioned the book to help teachers include the Indiana story as they teach American history. "That American history happened in their own backyards is a good thing for young Hoosiers to know as they take their place as citizens who must be engaged in the political process and make wise decisions now that will affect their future," Herbst writes in a foreword to the book.

Indiana at the turn of the 20th century  
and discover how unions responded.

More than 45,000 copies of the book have been distributed to classrooms across the state – free to any teacher of grades 8-12. A free digital version is available through the Historical Society's website. In addition, Indiana teachers are taking part in free workshops about using the book, also funded through the grant, so they can learn fresh ways to make Indiana and U.S. history more vivid to their students. Since November 2015, Madison and staff at the Historical Society have presented the workshops in communities across Indiana. More than 1,000 teachers are expected to be reached through the workshops. "We are striving to make the U.S. story local. When students can identify with something they learn in class and connect personal experience with an event or a place, then they are much more likely to pay attention and follow up and explore," Madison says. "The ultimate objective is to open students' minds and encourage curiosity so they can see that they are agents in the Indiana story and in the American story that is yet to come."

# Finances & Grantmaking

## 2015

During 2015 Lilly Endowment distributed grant payments of \$435.5 million and approved \$555.6 million in new grants.

### Cumulative figures

The generosity of the Endowment's founders has enabled it to disburse since 1937 more than \$8.9 billion in grants to 9,382 charitable organizations, most of them in Indiana. Of that \$8.9 billion, \$3.6 billion supported education (40 percent), \$3.0 billion supported community development (34 percent), and \$2.3 billion supported religion (26 percent). At the end of 2015 the Endowment's assets totaled \$11.8 billion.

### Grants paid [Chart 1, top]

In 2015 the Endowment paid grants of \$435.5 million. In this category, community development grants accounted for \$200.4 million or 46 percent of the total; religion grants totaled \$124.1 million or 29 percent; education grants added up to \$111.0 million or 25 percent.

As in previous years, most grants were paid to organizations in Indiana – a total of \$257.8 million (59 percent). Of the payment total of \$435.5 million, \$107.9 million (25 percent) was paid to non-Marion County grantees in Indiana and \$149.9 million (34 percent) to Marion County (Indianapolis) grantees. Organizations outside Indiana received \$177.7 million or 41 percent, mostly from religion grants.

### Grants approved [Chart 2, bottom]

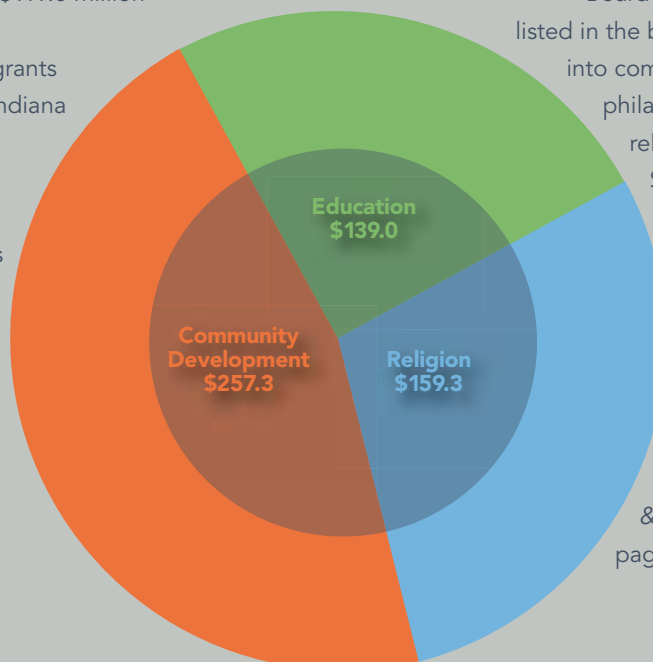
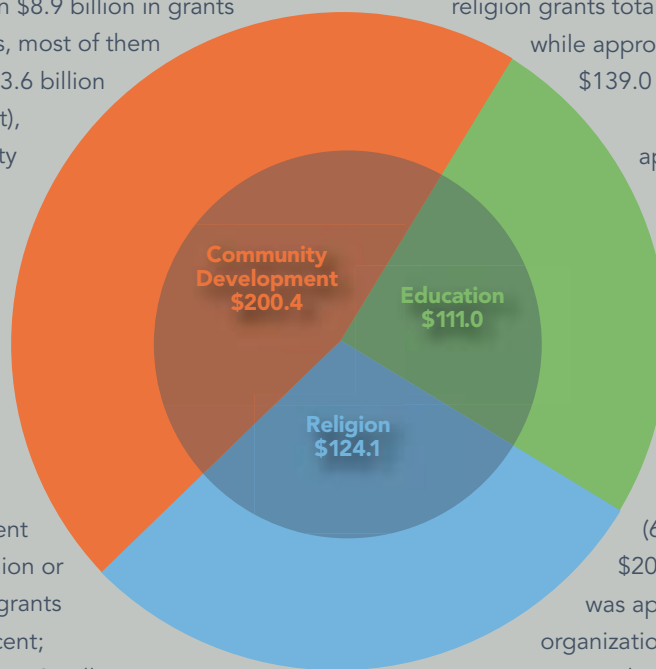
During 2015 the Endowment approved 766 grants for a total of \$555.6 million to 599 grantees, 158 new to the Endowment.

Community development grants totaled the most dollars at \$257.3 million or 46 percent of the total. Approvals for religion grants totaled \$159.3 million or 29 percent, while approvals for education grants totaled \$139.0 million or 25 percent.

Sixty-three percent of grants approved in 2015 went to Indiana organizations. Of the \$555.6 million in grants approved, \$191.6 million (34 percent) was approved for non-Marion County grantees in Indiana and \$158.6 million (29 percent) to Marion County (Indianapolis) grantees. Indiana organizations thus were awarded \$350.2 million (63 percent) of grants approved. \$205.4 million (37 percent) in grants was approved for non-Indiana organizations.

Board-approved and officers' grants are listed in the back of this report and are divided into community development and philanthropy, education and youth, and religion. Discretionary grants of up to \$7,500, authorized by the officers, are listed as a single line item for each division.

The Endowment's match for the charitable contributions of staff, retirees and Board members is reported as a single line item before the total of all grants approved. "Grant Guidelines & Procedures" are outlined on pages 58-59 of this report.





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## Report of Independent Auditors

The Board of Directors  
Lilly Endowment Inc.

We have audited the accompanying financial statements of Lilly Endowment Inc., which comprise the statements of financial position as of December 31, 2015 and 2014, and the related statements of activities and changes in unrestricted net assets and cash flows for the years then ended, and the related notes to the financial statements.

### Management's Responsibility for the Financial Statements

Management is responsible for the preparation and fair presentation of these financial statements in conformity with U.S. generally accepted accounting principles; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free of material misstatement, whether due to fraud or error.

### Auditor's Responsibility

Our responsibility is to express an opinion on these financial statements based on our audits. We conducted our audits in accordance with auditing standards generally accepted in the United States. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free of material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

### Opinion

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of Lilly Endowment Inc. at December 31, 2015 and 2014, and the changes in unrestricted net assets and cash flows for the years then ended in conformity with U.S. generally accepted accounting principles.

### Change in Accounting Principle

As discussed in Note 2 to the financial statements, Lilly Endowment Inc. has elected to change its method of accounting for dividend income recognition in 2015 and has retrospectively applied this change for all periods presented. Our opinion is not modified with respect to this matter.

*Ernst & Young LLP*

April 22, 2016



## Statements of Financial Position

As of December 31	2015	2014
<b>Assets</b>		
Cash and equivalents . . . . .	\$ 53,153,768	\$ 129,158,166
Other receivables . . . . .	18,873,326	26,848,800
Investments — at fair value:		
United States government and agency, bank, and corporate interest-bearing obligations . . . . .	22,436,993	92,502,243
Eli Lilly and Company common stock (cost — \$83,702,131 at December 31, 2015 and \$84,199,724 at December 31, 2014) . . . . .	10,773,551,345	9,065,686,418
Diversified equity investments . . . . .	911,719,909	687,103,093
Other assets . . . . .	5,213,469	344,504
	<u>\$ 11,784,948,810</u>	<u>\$ 10,001,643,224</u>
<b>Liabilities</b>		
Amounts appropriated for future grants . . . . .	\$ 144,621,069	\$ 24,604,750
Deferred tax liability . . . . .	209,606,228	175,815,601
	<u>354,227,297</u>	<u>200,420,351</u>
Unrestricted net assets . . . . .	11,430,721,513	9,801,222,873
	<u>\$ 11,784,948,810</u>	<u>\$ 10,001,643,224</u>

See accompanying notes.

## Statements of Activities and Changes in Unrestricted Net Assets

Year ended December 31	2015	2014
Income:		
Dividends . . . . .	\$ 280,923,758	\$ 277,965,571
Interest . . . . .	566,913	293,519
Total income . . . . .	281,490,671	278,259,090
Deductions:		
Grants approved. . . . .	558,998,132	348,911,642
Expenses:		
Program support . . . . .	6,861,265	6,440,442
Operational support . . . . .	7,078,577	6,181,099
Federal excise tax related to realized gains . . . . .	5,556,531	10,673,253
Federal excise tax related to unrealized gains . . . . .	33,790,627	43,701,820
Total grants approved and expenses. . . . .	612,285,132	415,908,256
Gain on sale of investment . . . . .	286,032,772	269,535,571
Increase in unrealized appreciation of marketable securities. . . . .	1,676,388,994	2,176,915,149
Other income (deductions) . . . . .	(2,128,665)	652,428
Increase in unrestricted net assets. . . . .	1,629,498,640	2,309,453,982
Unrestricted net assets:		
Balance at beginning of year . . . . .	9,801,222,873	7,491,768,891
Increase in unrestricted net assets . . . . .	1,629,498,640	2,309,453,982
Balance at end of year . . . . .	<u>\$ 11,430,721,513</u>	<u>\$ 9,801,222,873</u>

See accompanying notes.

## Statements of Cash Flows

Year ended December 31	2015	2014
Operating activities		
Increase in unrestricted net assets . . . . .	\$ 1,629,498,640	\$ 2,309,453,982
Adjustments to reconcile change in unrestricted net assets to net cash used in operating activities:		
Investment expenses . . . . .	288,490	272,117
Gain on mark-to-market adjustments on investments . . . . .	(1,676,388,994)	(2,176,915,149)
Gain on sale of investment . . . . .	(286,032,772)	(269,535,571)
Changes in assets and liabilities:		
Other receivables . . . . .	7,975,474	5,126,623
Other assets . . . . .	(4,868,965)	(191,635)
Amounts appropriated for future grants . . . . .	120,016,319	15,755,000
Deferred tax liability . . . . .	33,790,627	43,701,820
Net cash used in operating activities . . . . .	(175,721,181)	(72,332,813)
Investing activities		
Purchases of investments . . . . .	(483,896,944)	(311,327,574)
Proceeds from sale and maturity of investments . . . . .	583,902,217	494,658,491
Investment expenses . . . . .	(288,490)	(272,117)
Net cash provided by investing activities . . . . .	99,716,783	183,058,800
Net (decrease) increase in cash . . . . .	(76,004,398)	110,725,987
Cash and equivalents at beginning of year . . . . .	129,158,166	18,432,179
Cash and equivalents at end of year . . . . .	\$ 53,153,768	\$ 129,158,166

See accompanying notes.



# Notes to Financial Statements

December 31, 2015

## 1. Significant Accounting Policies

### Description of Organization

Lilly Endowment Inc. (the Endowment) is an Indianapolis based, private philanthropic foundation created by three members of the Lilly family through gifts of stock in their pharmaceutical business, Eli Lilly and Company. The stock of Eli Lilly and Company continues to be the Endowment's most significant asset. The Endowment supports the causes of religion, education and community development. The Internal Revenue Service has determined that the Endowment is exempt from federal income tax under Section 501(a) of the Internal Revenue Code. It remains a private foundation subject to federal excise tax on net investment income.

### Basis of Presentation

The accompanying financial statements have been prepared in accordance with accounting principles generally accepted in the United States (U.S.GAAP). Preparation of the financial statements requires management to make estimates and assumptions that affect the reported amounts of assets, liabilities, income, expense and related disclosures at the date of the financial statements and during the reporting period. Actual results could differ from those estimates. Subsequent events have been evaluated through April 22, 2016, the date these financial statements were available to be issued.

### Cash and Equivalents

Investments with original maturities of three months or less at the time of purchase are considered to be cash equivalents.

### Investments

Investments are stated at fair value in accordance with the Financial Accounting Standards Board (FASB) Accounting Standards Codification (ASC) Topic 958, *Not for Profit Entities*. Investments comprise equity and fixed income securities, which are recorded at market-quoted fair values. Changes in fair value are recorded in the statement of activities and changes in unrestricted net assets. There are no restrictions on investments.

Realized gains and losses from the sales of Eli Lilly and Company common stock are calculated using the first-in, first-out method of allocating cost.

### Facilities and Equipment

Expenditures for facilities and equipment are expensed as paid. The amounts expensed during 2015 and 2014, are not material to the financial statements.

### Grants

The Endowment primarily makes grants to organizations that qualify as public charities under the Internal Revenue Code (the Code). When distributions are made to organizations other than public charities, the Endowment assumes expenditure responsibility as required under applicable federal law. All grants are approved by the Board of Directors or its authorized representatives and are accrued when approved.

### Income Recognition

Income is recognized when amounts are realizable and earned. Interest income is recorded on the accrual basis and dividends are recorded on the ex-dividend date.

### Reclassifications

Certain amounts in the 2014 financial statements have been reclassified to conform to the presentation of the 2015 financial statements.

## 2. Change in Accounting Policy

In 2015, the Endowment elected to change its accounting policy for recognition of dividend income from the declaration date to the ex-dividend date. This change is in accordance with ASC Topic 250, *Accounting Changes and Error Corrections*, and has been applied retrospectively to all periods presented. The Endowment elected to make this change to the dividend income recognition accounting policy to better align income recognition with the date that shares of stock must be owned in order to be entitled to receive dividends. The impact on the previously issued 2014 financial statements was as follows:

	As Adjusted	As Originally Reported	Effect of Change
Dividend receivable	\$ —	\$ 65,702,902	\$ (65,702,902)
Total assets	10,001,643,224	10,067,346,126	(65,702,902)
Unrestricted net assets	9,801,222,873	9,866,925,775	(65,702,902)
 Total income	 \$ 278,259,090	 \$ 277,483,298	 \$ 775,792
Increase in unrestricted net assets	2,309,453,982	2,308,678,190	775,792
 Beginning unrestricted net assets at January 1, 2014	 \$ 7,491,768,891	 \$ 7,558,247,585	 \$ (66,478,694)

## 3. Required Distributions

The Code provides that the Endowment generally must distribute for charitable purposes 5% of the average market value of its investment assets. The Endowment must make additional qualifying distributions of approximately \$440,000,000, before January 1, 2017, to meet the 2015 minimum distribution requirements.

## 4. Other Receivables

Other receivables represent the fair value of future cash flows to be received from the Endowment's split-interest agreements. Amounts recorded are subject to subsequent changes in fair value, which would be recorded in the statement of activities and changes in unrestricted net assets under other income (deductions). These changes totaled a deduction of \$2,129,142 during 2015 and income of \$650,309 during 2014.

## 5. Fair Value of Financial Instruments

The Endowment determines fair values based on the framework for measuring fair value under ASC Topic 820, *Fair Value Measurements*. The following table summarizes fair value information at December 31, 2015 and 2014.

Description	Cost	Quoted Prices in Active Markets for Identical Assets (Level 1)	Observable Inputs (Level 2)	Fair Value (Carrying Value)
<b>December 31, 2015</b>				
Cash equivalents	\$ 49,088,338	\$ 49,091,071	\$ –	\$ 49,091,071
Fixed income securities	22,570,259	–	22,436,993	22,436,993
Marketable securities	870,167,031	11,685,271,254	–	11,685,271,254
	941,825,628	11,734,362,325	22,436,993	11,756,799,318
Other receivables	–	1,970,024	16,903,302	18,873,326
	\$ 941,825,628	\$ 11,736,332,349	\$ 39,340,295	\$ 11,775,672,644
<b>December 31, 2014</b>				
Cash equivalents	\$ 82,500,410	\$ 82,422,800	\$ –	\$ 82,422,800
Fixed income securities	92,787,318	–	92,502,243	92,502,243
Marketable securities	613,922,474	9,752,789,511	–	9,752,789,511
	789,210,202	9,835,212,311	92,502,243	9,927,714,554
Other receivables	–	5,817,442	21,031,358	26,848,800
	\$ 789,210,202	\$ 9,841,029,753	\$ 113,533,601	\$ 9,954,563,354

Transfers between levels, if any, are recorded at the beginning of the reporting period. There were no transfers between Levels 1, 2, and 3 during the years ended December 31, 2015 and 2014.

The fair value for marketable securities is determined using quoted market values. Fair values of fixed income securities are based on quoted market prices, where available. These fair values are obtained primarily from third-party pricing services. United States Government securities represent Level 1 securities, while Level 2 securities primarily include corporate securities. For fixed income securities that are not based on quoted market values, the value is determined by pricing models, quoted prices of securities with similar characteristics, or discounted cash flows. The fair value of other receivables is based on observable inputs using quoted market values and a combination of a market and income approach determined based on future cash flows. Inputs in this valuation methodology include the initial value of the Endowment's split-interest agreement, the Endowment's interest percentage in the split-interest agreement, annuity percentage per the split interest agreement, estimated rate of return and discount rate.

## 6. Federal Excise Taxes

The Endowment is subject to federal excise taxes imposed on private foundations at 2%, or at 1% if certain conditions are met. The excise tax

is imposed on net investment income, as defined under federal law, which includes interest, dividends, and net realized gains on the sale of investments. The Endowment qualified for a 1% excise tax rate for the year ended December 31, 2015, and a 2% excise tax rate for the year ended December 31, 2014. Federal excise tax expense on realized amounts was \$5,556,531 and \$10,673,253 for the years ended December 31, 2015 and 2014, respectively. The Endowment made estimated excise tax payments totaling \$10,770,000 and \$10,780,000 during 2015 and 2014, respectively. Due to estimated tax overpayments during these years, the Endowment recorded a receivable of \$5,213,469 and \$106,747 at December 31, 2015 and 2014, respectively.

The Endowment recorded an additional liability of \$33,790,627 and \$43,701,820 for the year-ended December 31, 2015 and 2014, respectively, for deferred federal excise tax related to unrealized gains on investments.

The Endowment is subject to routine audits by taxing jurisdictions. The Endowment believes it is no longer subject to income tax examinations for years prior to 2012 due to three-year statute of limitations.

If incurred, any interest and penalties would be recorded as a component of excise tax.

# 2015 Grant Approvals

## Community Development and Philanthropy

Dollar amount approved in 2015

### Abraham Lincoln Foundation

Philadelphia, PA

MOLLUS 150th anniversary event	15,000
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### American Cabaret Theatre

Indianapolis, IN

General operating support	100,000
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### American Enterprise Institute for Public Policy Research

Washington, DC

General operating support	100,000
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### American National Red Cross

Washington, DC

Disaster relief	1,000,000
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Disaster response	1,000,000
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Humanitarian information-technology support system	1,500,000
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### American Pianists Association

Indianapolis, IN

2016-17 Classical Fellowships and 2018-19 Jazz Fellowships	275,000
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Support for endowment, reserve fund and fundraising enhancements	5,000,000
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### Arts Council of Indianapolis

Indianapolis, IN

Art & Soul at the Artsgarden	52,000
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General operating support	300,000
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### Atlas Economic Research Foundation

Washington, DC

General operating support	500,000
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### Big Car Media

Indianapolis, IN

Support for a new art space in Garfield Park	50,000
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<b>Candles</b>		<b>Domestic Violence Network of Greater Indianapolis</b>	
Terre Haute, IN		Indianapolis, IN	
Holographic recording of Eva Kor	500,000	General operating support	225,000
<b>Career Learning &amp; Employment Center for Veterans</b>		<b>Economic Club of Indiana</b>	
Indianapolis, IN		Indianapolis, IN	
Continued support for Operation: Job Ready Veterans	485,000	General operating support	10,000
<b>Cathedral Arts</b>		Speaker fees for program and luncheon	12,700
Indianapolis, IN		<b>Eiteljorg Museum of American Indians and Western Art</b>	
Tenth Quadrennial International Violin Competition	1,000,000	Indianapolis, IN	
<b>Central Indiana Corporate Partnership Foundation (CICP Foundation)</b>		General operating support	1,147,500
Indianapolis, IN		Support for endowment	7,500,000
Applied Research Institute project	16,225,000	<b>Federalist Society for Law and Public Policy Studies</b>	
Assessment of Indiana's agbiosciences workforce	175,000	Washington, DC	
BioCrossroads initiative — charitable, educational and scientific programs	2,900,000	General operating support	150,000
<b>CEOs for Cities</b>		<b>Footlite Musicals</b>	
Cleveland, OH		Indianapolis, IN	
2015 Indianapolis national meeting	25,000	Auditorium seating	44,000
<b>Children's Museum of Indianapolis</b>		<b>Fraser Institute</b>	
Indianapolis, IN		Vancouver, BC	
Support to endow the "Sports Legends Experience" and special exhibitions	10,000,000	General operating support	300,000
<b>Coalition for Homeless Intervention and Prevention</b>		<b>Freedom House</b>	
Indianapolis, IN		Washington, DC	
General operating support	260,000	General operating support	100,000
<b>Conner Prairie Museum</b>		<b>George Mason University Foundation</b>	
Fishers, IN		Fairfax, VA	
Restoration of William Conner House	212,540	Law and Economics Center judicial education programs	100,000
Support for endowment, fundraising enhancements and summer camp expansion	7,500,000	<b>Heartland Actors' Repertory Theatre</b>	
<b>Crossroads Rehabilitation Center</b>		Indianapolis, IN	
Indianapolis, IN		Production of <i>Twelfth Night</i> , and strategic planning	35,000
Continuation of the Autism Family Support Center and related programs	2,083,128	<b>Heartland Film</b>	
<b>Dance Kaleidoscope</b>		Indianapolis, IN	
Indianapolis, IN		General operating support	300,000
General operating support	100,000	Support for endowment, fundraising and theatre partnerships	5,000,000
Support to create an endowment and reserve fund	5,000,000	<b>Humane Society of Indianapolis</b>	
		Indianapolis, IN	
		Support for mobile vaccination clinic and technology needs	470,000

**Indiana Association for Community Economic Development**

Indianapolis, IN

General operating support 175,000

**Indiana Association of United Ways**

Indianapolis, IN

Program and operating support 6,607,000

**Indiana Biosciences Research Institute**

Indianapolis, IN

Unrestricted support (an \$80 million shared grant with the Education Division) 40,000,000

**Indiana Historical Society**

Indianapolis, IN

Mobile museum and collections accessibility initiatives 2,250,000

**Indiana Humanities**

Indianapolis, IN

Establish an endowment, capacity building and capital needs 5,000,000

General operating support and technology upgrade 135,000

**Indiana Landmarks**

Indianapolis, IN

Support for endowment 7,500,000

**Indiana National Guard Relief Fund**

Indianapolis, IN

Continuing support for Relief Fund grants and the Families First Initiative 790,000

**Indiana Opera Society**

Indianapolis, IN

General operating support 70,000

**Indiana Philanthropy Alliance**

Indianapolis, IN

General operating support 285,000

**Indiana Philanthropy Alliance Foundation**

Indianapolis, IN

GIFT technical assistance for 2016 670,000

Internship program for Indiana community foundations 925,000

**Indiana Repertory Theatre**

Indianapolis, IN

General operating support 300,000

Support for endowment, campaign administration and capital improvements 7,500,000

**Indiana Sports Corp.**

Indianapolis, IN

General operating support 500,000

**Indiana Symphony Society**

Indianapolis, IN

General operating support 1,237,000

Pension plan contribution and implementation of strategic plan 10,000,000

**Indiana University Foundation**

Bloomington, IN

Public Policy Institute Data Capacity Building Initiative 32,585

**Indianapolis Art Center**

Indianapolis, IN

General operating support 200,000

**Indianapolis Children's Choir**

Indianapolis, IN

General operating support 150,000

30th anniversary campaign 700,000

**Indianapolis Jazz Foundation**

Indianapolis, IN

Indy Jazz Fest 42,000

**Indianapolis Museum of Art**

Indianapolis, IN

Campus enhancements and innovation fund 10,000,000

General operating support 500,000

**Indianapolis Neighborhood Housing Partnership**

Indianapolis, IN

General operating support 5,300,000

Special initiative to support comprehensive community development strategies 26,600,000

**Indianapolis Neighborhood Resource Center**

Indianapolis, IN

General operating support 250,000

**Indianapolis Rowing Center**

Indianapolis, IN

Capital campaign 27,500

**Indianapolis Zoological Society**

Indianapolis, IN

Bicentennial pavilion and promenade 10,000,000

General operating support 1,116,720

**Indianapolis-Marion County  
Building Authority**

Indianapolis, IN

City-County Building Plaza project 5,000,000

**Indy Hub Foundation**

Indianapolis, IN

Marketing for 5x5 Arts Initiative 20,000

Support for the Live Indy initiative 400,000

**Intercollegiate Studies Institute**

Wilmington, DE

General operating support 125,000

**International Center**

Indianapolis, IN

Establish an endowment 5,000,000

General operating support 500,000

**Jewish Community Center Association  
of Indianapolis**

Indianapolis, IN

Capacity building initiative 285,267

**John H. Boner Community Center**

Indianapolis, IN

IndyEast Promise Zone implementation 487,541

**Josef Gingold Fund for the  
International Violin Competition**

Indianapolis, IN

Support for endowment 5,000,000

**Keep Indianapolis Beautiful**

Indianapolis, IN

General operating support 325,000

**Kennedy King Memorial Initiative**

Indianapolis, IN

Organizational capacity building and  
community planning project 50,000**Kurt Vonnegut Memorial Library**

Indianapolis, IN

Armistice Day Arts Fair 35,000

Marketing and operations 22,456

**Local Initiatives Support Corp.**

New York, NY

Indianapolis LISC program 500,000

**Madame Walker Urban Life Center**

Indianapolis, IN

Transitional support and organizational  
assessment 350,000**Manhattan Institute for Policy Research**

New York, NY

General operating support 200,000

**Metropolitan Indianapolis  
Public Broadcasting (WFYI)**

Indianapolis, IN

Documentary on Crispus Attucks  
High School 50,000**Nature Conservancy**

Arlington, VA

Freshwater conservation 2,000,000

**New Harmony Project**

Indianapolis, IN

General operating support 50,000

**Pacific Research Institute for  
Public Policy**

San Francisco, CA

General operating support 175,000

**Partnerships for Lawrence**

Lawrence, IN

Strategic planning 14,000

**Political Economy Research Center**

Bozeman, MT

General operating support 50,000

**Regional Opportunity Initiatives**

Bloomington, IN

Advancing Education and Workforce  
Through Career Immersion; Regional  
Opportunity Fund (a \$25,870,000 shared  
grant with the Education Division) 9,000,000**Sagamore Institute for Policy Research**

Indianapolis, IN

General operating support 300,000

**Salvation Army**

Alexandria, VA

Disaster relief 500,000

Disaster response 500,000

**Shepherd Community**

Indianapolis, IN

Delivery and outcomes evaluation 45,000

**Social Philosophy and Policy Foundation**

Bowling Green, OH

General operating support 100,000

**Stanford University**

Stanford, CA

General operating support 125,000

**Tax Foundation**

Washington, DC

General operating support 110,000

**United Way of Central Indiana**

Indianapolis, IN

2015 annual campaign 4,300,000

Continuation of a capacity building and resource development initiative for Julian Center 35,000

Homelessness Targeted Initiatives Fund 438,750

Social Assets and Vulnerabilities Indicators (SAVI) community information system: general operating support and development and execution of United Way of Central Indiana's data integration plan 2,580,500

**United Way Worldwide**

Alexandria, VA

Donor engagement initiative 6,600,000

**University of Southern Indiana**

Evansville, IN

General operating support for the Historic New Harmony project 125,000

**YMCA of Indianapolis**

Indianapolis, IN

Study to assess opportunities to serve military-connected families 28,000

**Young Audiences of Indiana**

Indianapolis, IN

General operating support, strategic planning and relocation expenses 267,500

**Holiday Assistance Fund**

(26 grants ranging from \$2,000 to \$126,000) 470,000

Catholic Charities Indianapolis

Christ Emmanuel Missionary Baptist Church

Community Action of Greater Indianapolis

Community RULE

Flanner House

Gleaners Food Bank of Indiana

Hall Temple Church of God in Christ

Healing Place

Indiana F.O.P. Foundation

Indianapolis Housing Agency

Indianapolis Urban League

Kingsley Terrace Church of Christ

La Plaza

Latino Community Development Corp.

Life Line Community Center

Lutheran Child &amp; Family Services of Indiana

Metro Baptist Center

Miracle Place

Mozel Sanders Foundation

New Covenant Church

Rev. Richard Hunter Ministries

Salvation Army

Sow One Foundation

United Way of Central Indiana (2)

Westminster Neighborhood Services

**PHILANTHROPY****Council on Foundations**

Arlington, VA

2015 membership dues 55,000

**Foundation Center**

New York, NY

General operating support 125,000

**GuideStar USA**

Williamsburg, VA

2015 membership dues 50,000

**Independent Sector**

Washington, DC

2015 membership dues 17,500

**Philanthropy Roundtable**

Washington, DC

General operating support 100,000

New website 50,000

**Subtotal**

Community Development Grants 256,778,687

**Subtotal**

Philanthropy Grants 397,500

**Subtotal**

Community Development and Philanthropy Discretionary Grants 110,500

**Total**

Community Development and Philanthropy Grants 257,286,687



# 2015 Grant Approvals

## Education and Youth



Dollar amount approved in 2015

### Central Indiana Community Foundation

Indianapolis, IN

Latino Scholarship Fund Dinner	10,000
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### Central Indiana Corporate Partnership Foundation (CICP Foundation)

Indianapolis, IN

I-STEM Resource Network	700,000
IndyXtern Program (phase 2)	1,400,000

### Chalkbeat

New York, NY

Indiana education news service	100,000
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### College Mentors for Kids

Indianapolis, IN

Evaluation of impact on college students of College Mentors for Kids participation	50,000
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### Eleven Fifty Academy

Carmel, IN

Evaluation and organizational readiness assessment	50,000
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### Eskenazi Health Foundation

Indianapolis, IN

Support for Internships for Independence Program	50,000
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### Geography Educators' Network of Indiana

Indianapolis, IN

Support for Educator Bicentennial Program	20,000
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### Independent Colleges of Indiana

Indianapolis, IN

Administration of the Lilly Endowment Community Scholarship Program 2015/16	1,511,222
Support for Indiana College Costs Estimator	250,000

### Indiana Association of Public Education Foundations

Greenwood, IN

Training at The Fund Raising School for Indiana education foundation staff 50,000

### Indiana Biosciences Research Institute

Indianapolis, IN

Unrestricted support (an \$80 million shared grant with the Community Development Division) 40,000,000

### Indiana State Chamber of Commerce Foundation

Indianapolis, IN

Information gathering on counseling practices 50,000

### Indiana State University

Terre Haute, IN

Extending Teacher Creativity 2016: A Summer Workshop for Teacher Creativity Fellows 100,294

### Indiana Student Financial Aid Association

Bloomington, IN

College Goal Sunday 2016 50,000

### Indiana University Foundation

Bloomington, IN

Development of a Rural Center at Indiana University (phase 1) 122,600

Gift in memory of Thomas M. Lofton for the Lilly Library 1,000,000

Indiana Campus Compact 900,000

### Indiana Youth Institute

Indianapolis, IN

College and Career Counseling Initiative 1,526,471

### Indiana Commission for Higher Education

Indianapolis, IN

"You Can. Go Back." campaign marketing 150,000

### Indianapolis Black Alumni Council

Indianapolis, IN

College Fair 2015 events 15,000

### National Urban Fellows

New York, NY

Support for fellowships in Indianapolis, recruitment and a match to increase alumni giving 85,000

### Regional Opportunity Initiatives

Bloomington, IN

Advancing Education and Workforce Through Career Immersion; Regional Opportunity Fund (a \$25,870,000 shared grant with the Community Development Division) 16,870,000

### St. Joseph Institute for the Deaf

Indianapolis, IN

Transitional support and institutional development 50,000

### School on Wheels

Indianapolis, IN

Capacity building in marketing 50,000

### Starfish

Indianapolis, IN

Program expansion 50,000

### United Negro College Fund

Washington, DC

Career Pathways Initiative for Historically Black Colleges and Universities and Predominantly Black Institutions 50,000,000

Support for the UNCF Indiana campaign 85,000

### University of Indianapolis

Indianapolis, IN

Continuation of Education Workforce and Innovation Network by CELL 925,000

Convenings on research on co-curricular programs in central Indiana 23,000

### Wabash County YMCA

Wabash, IN

Administrative support for Promise Indiana expansion 705,000



## Teacher Creativity Fellowship Program

Competitive summer program for renewal of Indiana schoolteachers, principals and assistant principals, guidance counselors and library media specialists

(100 grants at \$10,000 each) 1,000,000

## YOUTH

### Achieve International

Indianapolis, IN

Van purchase 35,075

### Asante Children's Theatre

Indianapolis, IN

Capacity building 50,000

### Boy Scouts of America Council

Indianapolis, IN

Scouting growth and innovation 5,987,800

### Center for Leadership Development

Indianapolis, IN

Operating support 400,000

### Child Advocates

Indianapolis, IN

Child Advocates law clinic and Undoing Racism speaker series and documentary 50,000

### Damar Services

Indianapolis, IN

*Children of the Dumping Ground* training films 45,000

Filming and editing of *Children of the Dumping Ground* documentary 35,000

### Fathers and Families Resource/Research Center

Indianapolis, IN

Operating support 500,000

### Girl Scouts of Central Indiana

Indianapolis, IN

Fundraising and development capacity building 25,000

Program expansion and capacity building 4,226,284

### Girls Inc. of Greater Indianapolis

Indianapolis, IN

Work It Out and Redefining Beauty outreach collaboration 2,000,000

## Indiana Black Expo

Indianapolis, IN

Youth and education programs and development of new strategic plan 620,000

## Indiana Historical Society

Indianapolis, IN

The Y-Press Story: Listen, Tell, Learn 50,000

## Indiana Philanthropy Alliance Foundation

Indianapolis, IN

Youth Philanthropy Initiative of Indiana 140,000

## Indiana Youth Services Association

Indianapolis, IN

Youth development credential 50,000

## Indianapolis Private Industry Council

Indianapolis, IN

Continuing support for the Youth Employment Services (YES) program 1,078,500

## Indianapolis Urban League

Indianapolis, IN

Programmatic and organizational capacity building 445,000

## Junior Achievement of Central Indiana

Indianapolis, IN

Career Success Initiative 50,000

## Marion County Commission on Youth

Indianapolis, IN

Operating support and capacity building 279,500

Youth Advocate Program (YAP) 250,000

## Outreach

Indianapolis, IN

Capacity building 50,000

## Peace Learning Center

Indianapolis, IN

Power of One and ACT Out programs 800,000

## Planned Parenthood of Indiana and Kentucky

Indianapolis, IN

Evidenced-based sexuality education 50,000

## Reach for Youth

Indianapolis, IN

Teen Court 50,000

## Villages of Indiana

Bloomington, IN

Brighter Futures Are Within Our Reach initiative 1,066,780

## Summer Youth Program Fund

Grants for organizations to provide summer activities for youth

(164 competitive grants to support 191 programs ranging from \$1,000 to \$244,419) 1,899,076

Adult & Child Center

Aftercare for Indiana through Mentoring

Agape Therapeutic Riding Center

American Diabetes Association

Anglican Church of Resurrection

Artmix (previously known as VSA of Indiana)

Art With a Heart

Asante Children's Theatre

AYS

Big Brothers Big Sisters of Central Indiana

Big Car Media

Boys & Girls Clubs of Indianapolis (5)

Brebeuf Preparatory School

Brightwood Community Center

Broadway United Methodist Church

Brooke's Place for Grieving Young People

Burmese American Community Institute

Butler University

Calvary Temple of Indianapolis

Camptown

Catholic Charities Indianapolis (2)

Catholic Youth Organization

Centro Familiar Vida Nueva

Chapel Rock Christian Church

Charitable Allies

Children's Museum of Indianapolis

Christamore House

Christel House Academy

Circle City Frontiers Club

Claude McNeal's Musical Theatre Training Program

Coburn Place Safe Haven

Community Alliance of the Far Eastside (CAFE)

Community Health Network Foundation

Concord Center Association

Corinthian Baptist Church

Cosmo Knights Scholarship Fund

Damar Services

Dance Kaleidoscope

Dayspring Center

Diabetic Youth Foundation of Indiana

DirectEmployers Association Foundation

Dyslexia Institute of Indiana

Early Learning Indiana

Earth Charter Indiana

East Tenth United Methodist Children and Youth Center

Edna Martin Christian Center

Englishton Park Presbyterian Ministries

Entrepreneurial Ventures in Education

Family Promise of Greater Indianapolis

Fay Bickard Glick Neighborhood Center at Crooked Creek

Felege Hiywot Center

First Samuel Missionary Baptist Church

Flanner House

Fletcher Place Community Center

Forest Manor Multi-Service Center

Freetown Village

Freewheelin' Community Bikes

Girl Scouts of Central Indiana

Girls Inc. of Greater Indianapolis

Gleaners Food Bank of Indiana

Good News Mission

Great Commission Church of God

Guidance Life Skills and Mentoring (G.L.A.M.)





Happy Hollow Children's Camp  
 Harrison Center for the Arts  
 Hawthorne Social Service Association  
 Health and Hospital Corp.  
 Health and Science Innovations  
 Hear Indiana  
 Hemophilia of Indiana  
 Hispanic Latino Minority Health Coalition of Greater Indianapolis  
 Honor Without End  
 libada Dancers  
 Indiana Amateur Baseball Association  
 Indiana Annual Conference of the United Methodist Church  
 Indiana Deaf Camps Foundation  
 Indiana Golf Foundation  
 Indiana Latino Institute  
 Indiana Performing Arts Centre  
 Indiana School for the Deaf  
 Indiana State Museum Foundation  
 Indiana University Foundation (2)  
 Indianapolis Algebra Project  
 Indianapolis Art Center  
 Indianapolis Ballet  
 Indianapolis Children's Choir  
 Indianapolis Housing Agency  
 Indianapolis-Marion County Public Library Foundation  
 Indianapolis Museum of Art  
 Indianapolis Parks Foundation (5)  
 Indianapolis Soap Box Derby Association  
 Jackson Center for Conductive Education  
 James Whitcomb Riley Memorial Association  
 Jameson Camp  
 John H. Boner Community Center (2)  
 Julian Center  
 Just the Beginning  
 Keep Indianapolis Beautiful  
 La Plaza (2)  
 Lawrence United Methodist Church  
 LifeBridge Community  
 Lillian Davis Foundation  
 Little Red Door Cancer Agency  
 Lutheran Child & Family Services of Indiana  
 Madame Walker Urban Life Center  
 Marian University (2)  
 Marion County Commission on Youth (3)  
 Martin Luther King Multi-Service Center  
 Mary Rigg Neighborhood Center



Metropolitan School District of Pike Township  
 Metropolitan School District of Warren Township  
 Miracle Place  
 Mission Indy  
 Montessori Educational Charity  
 Mt. Moriah Missionary Baptist Church  
 Music for All  
 National Junior Tennis League of Indianapolis  
 Net Literacy Corp. (dba Senior Connects Corp.)  
 New Beginnings Church  
 New Covenant Church  
 Nine 13  
 Noble of Indiana  
 Northside New Era Community Outreach  
 Oaks Academy  
 100 Black Men of Indianapolis  
 Paramount School of Excellence  
 Partnerships for Lawrence  
 Pathway Resource Center  
 Peace Learning Center  
 People's Burn Foundation  
 Philharmonic Orchestra of Indianapolis  
 Pro 100 (dba TeenWorks)  
 Project Endure  
 Promise Land Christian Community Church

Purdue University  
 St. Florian Center  
 St. Richard's School  
 Salvation Army (3)  
 Saturday Evening Post Society  
 School on Wheels  
 Shepherd Community (2)  
 Social Health Association of Indiana  
 Southeast Community Services  
 Speedway Baptist Church  
 SpringHill Camps  
 Starfish  
 Stop the Violence Indianapolis  
 Storytelling Arts of Indiana  
 Symphonic Youth Orchestra of Greater Indianapolis  
 Teachers' Treasures  
 Trinity House Academy  
 Wayne Township Education Foundation  
 Westminster Neighborhood Services  
 Writers Center of Indiana (dba Indiana Writers Center)  
 YMCA of Indianapolis (13)  
 Young Actors Theatre  
 Young Audiences of Indiana (2)  
 Young Life Indianapolis Urban  
 Youth Outdoor Exploration Academy  
 Zion Hill Missionary Baptist Church

#### Summer Youth Program Fund

Capital project grants for organizations to  
 improve capacity to conduct summer programs  
 (40 competitive grants ranging from  
 \$700 to \$30,000)

800,924

Aftercare for Indiana through Mentoring  
 Anglican Church of Resurrection  
 Artmix (previously known as VSA of Indiana)  
 Art With a Heart  
 Brightwood Community Center  
 Burmese American Community Institute  
 Christamore House  
 Christel House Academy  
 Coburn Place Safe Haven  
 Concord Center Association  
 Damar Services  
 Edna Martin Christian Center  
 Felege Hiywot Center

First Samuel Missionary Baptist Church  
 Flanner House  
 Girl Scouts of Central Indiana  
 Happy Hollow Children's Camp  
 Hawthorne Social Service Association  
 Health and Science Innovations  
 Indiana Annual Conference of the United Methodist Church  
 Indiana Deaf Camps Foundation  
 Indiana Performing Arts Centre  
 Indiana State Museum Foundation  
 Indianapolis Art Center  
 Indianapolis-Marion County Public Library Foundation  
 Indianapolis Parks Foundation  
 Jameson Camp  
 John H. Boner Community Center  
 Mt. Moriah Missionary Baptist Church  
 National Junior Tennis League of Indianapolis  
 Net Literacy Corp. (dba Senior Connects Corp.)  
 Oaks Academy  
 100 Black Men of Indianapolis  
 Peace Learning Center  
 Pro 100 (dba TeenWorks)  
 Social Health Association of Indiana  
 Southeast Community Services  
 Westminster Neighborhood Services  
 Writers Center of Indiana (dba Indiana Writers Center)  
 Zion Hill Missionary Baptist Church

#### Subtotal

Education Grants 117,948,587

#### Subtotal

Youth Grants 21,033,939

#### Subtotal

Education and Youth Discretionary Grants 77,750

#### Total

Education and Youth Grants 139,060,276

# 2015 Grant Approvals

## Religion



Dollar amount approved in 2015

### Appalachia Service Project

Johnson City, TN

Continued support for the RESPONSE vocational discernment program 400,000

### Association of Theological Schools

Pittsburgh, PA

Continued support for Leadership Education for Theological Educators 4,000,000

### Butler University

Indianapolis, IN

Continued support for program on sacred texts, religion and the arts 122,496

### Center for Interfaith Cooperation

Indianapolis, IN

Organizational capacity building project 50,000

### Christian Reformed Church in North America

Grand Rapids, MI

Connecting with congregations in the Christian Reformed Church: A Resourcing Congregations Initiative project 999,817

### Christian Theological Seminary

Indianapolis, IN

Continued support for institutional renewal projects 2,000,000

Support for Lilly Endowment National and Indiana Clergy Renewal Programs for 2017 7,500,000

### Emory University

Atlanta, GA

Completion of study of the theological and moral dimensions of retirement 20,000

**Fuller Theological Seminary**

Pasadena, CA

Strengthening congregational ministries with youth and young adults	750,000
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Sustainability funding for Micah Group preaching program	300,000
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**Fund for Theological Education**

Decatur, GA

Continued support	5,225,000
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**Greater Washington Educational Telecommunications Association**

Arlington, VA

Enhanced promotional and educational activities for <i>The Pilgrims</i> documentary film project	49,808
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**In Trust**

Wilmington, DE

Continued support for In Trust Center for Theological Schools project	5,000,000
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**Indiana University Foundation**

Bloomington, IN

Supplemental support for 2015 Spirit & Place Civic Festival	50,000
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**Indianapolis Center for Congregations**

Indianapolis, IN

Continued support for regional centers for congregations in Indiana	7,500,000
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**Institute for Ecumenical and Cultural Research**

Collegeville, MN

Continued support for the Ecclesial Literature Project	1,596,540
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**International African American Museum**

Charleston, SC

Planning support for International African American Museum	50,000
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**MPT Foundation**

Owings Mills, MD

Support for documentary film about the life of Reinhold Niebuhr	550,000
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**National Trust for Historic Preservation**

Washington, DC

National Fund for Sacred Places project	11,108,176
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**Partners for Sacred Places**

Philadelphia, PA

National Fund for Sacred Places project	2,767,373
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**Plymouth Congregational Church**

Des Moines, IA

Continued support for Transition-Into-Ministry program	593,235
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**Religion Newswriters Foundation**

Columbia, MO

Continued support for Religion News Service project	2,750,000
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**Shakertown at Pleasant Hill**

Harrodsburg, KY

Restoring the Spiritual Center project	5,149,800
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**Smithsonian Institution**

Washington, DC

Center for the Study of African American Religion project	10,000,000
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Endowed Curator of American Religious History and Programmatic Support project	5,000,000
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**Spelman College**

Atlanta, GA

Planning for Women of Color in Ministry National Mentorship Program	49,623
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**Wabash College**

Crawfordsville, IN

Continued support for Wabash Pastoral Leadership Program	1,731,115
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**WNET**

New York, NY

Support for the 19th season of <i>Religion &amp; Ethics Newsweekly</i>	4,310,000
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**Campus Ministry Theological Exploration of Vocation Initiative**

Programs that help campus ministries at public universities develop and expand their vocational discernment work with undergraduate students

(53 grants ranging from \$30,000 to \$100,000)	5,036,057
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Archdiocese of St. Louis

Baptist General Convention of Texas

Berkeley Canterbury Foundation

Campus Christian Fellowship

Catholic Center at Georgia Institute of Technology

Chapel of the Cross Treasurer

Christian Church Campus Ministry

Classis Zeeland of the Reformed Church in America

College Avenue United Methodist Church

Emmaus Campus Ministry

Episcopal Diocese of Florida





First United Methodist Church  
 Great Plains Annual Conference of the United Methodist Church  
 House University Ministries of Chattanooga  
 InterVarsity Christian Fellowship-USA  
 Kentucky State University Wesley Foundation  
 Lutheran Campus Council of Minot North Dakota  
 Lutheran Campus Council of San Diego  
 Lutheran Campus Ministry at Georgia Tech  
 Lutheran Campus Ministry at the University of Maryland  
 Lutheran Council for Campus Ministry at the Pennsylvania State University  
 MacLaurin Institute  
 New College for Advanced Christian Studies  
 Newman Center St. Paul's Catholic Chapel  
 Newman Community at Virginia Tech  
 Presbyterian and Disciples Campus Center  
 Presbytery of St. Andrew  
 Protestant Campus Ministry at Bloomsburg  
 Reformed University Ministries  
 Roman Catholic Diocese of Charlotte  
 St. Augustine Church and Catholic Student Center  
 St. John XXIII Catholic Church  
 St. John's Catholic Chapel  
 St. Paul's Newman Center  
 St. Paul's United Methodist Church & Wesley Foundation  
 St. Thomas Aquinas Catholic Church of Lincoln  
 St. Thomas Aquinas Church Corp.  
 St. Thomas Aquinas Newman Center  
 St. Thomas Aquinas Parish  
 St. Thomas More Newman Center  
 Saint Paul's Outreach  
 Theological Horizons  
 Tyson House Students Foundation

United Campus Ministry in Aggieland  
 University Catholic Center  
 Virginia Baptist Mission Board  
 Wabash Valley Baptist Association  
 Wesley Foundation at the University of North Carolina  
 Wesley Foundation at the University of Oklahoma  
 Wesley Foundation of Oklahoma State University  
 Wesley Foundation of the University of North Carolina at Greensboro  
 Wisconsin Annual Conference of the United Methodist Church  
 Wisconsin Christian Campus Ministries

### High School Youth Theology Institutes at Colleges and Universities

Programs that encourage young people to explore their religious beliefs by studying theology and examining how faith calls them to lives of service  
 (84 grants ranging from \$102,374 to \$1,980,000 ) 44,536,122

Asbury College  
 Ashland University  
 Augsburg College  
 Azusa Pacific University  
 Barclay College  
 Baylor University  
 Bethel University  
 Bethune-Cookman College  
 Boston College  
 Brescia University  
 Caldwell University  
 Campbell University  
 Canisius College  
 Cardinal Stritch University  
 Carroll College  
 Catawba College  
 Catholic University of America  
 College of St. Scholastica  
 Concordia University  
 Concordia University Irvine  
 Emory University  
 Fund for Theological Education  
 George Fox University  
 Georgetown College  
 Gonzaga University  
 Gordon College  
 Goshen College  
 Gustavus Adolphus College

Hendrix College  
 Holy Cross College  
 Hope College  
 Huntingdon College  
 Huntington University  
 Indiana Wesleyan University  
 Johnson University  
 LeTourneau University  
 Lewis University  
 Lipscomb University  
 Loyola Marymount University  
 Loyola University (New Orleans)  
 Loyola University of Chicago  
 Lubbock Christian University  
 Malone University  
 Marian University  
 Maryville College  
 Mid-America Nazarene University  
 Morehouse College  
 North Carolina Wesleyan College  
 Northwest University  
 Northwestern College  
 Oklahoma Christian University  
 Ottawa University  
 Our Lady of the Lake University  
 Pepperdine University  
 Pfeiffer University  
 Randolph-Macon College  
 Roanoke College  
 Rust College  
 Sacred Heart University  
 St. Catherine University  
 St. John's University  
 St. Mary's College  
 St. Thomas University  
 Seattle Pacific University  
 Shenandoah University  
 Simpson College  
 Southern Wesleyan University  
 Southwestern College  
 Tabor College  
 Taylor University  
 Trevecca Nazarene University  
 Trinity International University  
 Tuskegee University  
 University of Findlay

University of Mount Olive  
 University of Saint Francis  
 University of the South  
 Virginia Union University  
 Viterbo College  
 Wabash College  
 Wayland Baptist University  
 Westmont College  
 Wiley College

### National Initiative to Address Economic Challenges Facing Pastoral Leaders

Support to help national and regional church-related organizations undertake innovative projects designed to reduce or alleviate the economic challenges that impair the ability of pastors to lead congregations effectively

(24 planning grants ranging from \$34,127 to \$50,000) 1,173,974

American Baptist Home Mission Society  
 Archdiocese of Indianapolis  
 Board of Pensions of United Presbyterian Church in U.S.A.  
 Christian Church in Indiana  
 Church of God Ministries  
 Cincinnati Christian University  
 Cooperative Baptist Fellowship  
 Episcopal Church Foundation  
 Episcopal Diocese of Indianapolis  
 Evangelical Covenant Church  
 Evangelical Lutheran Church in America  
 General Board of Pension and Health Benefits of the United Methodist Church  
 Mennonite Foundation  
 Ministers and Missionaries Benefit Board of the American Baptist Churches, U.S.A.



Missouri United Methodist Foundation	
National Association of Evangelicals	
Pension Boards-United Church of Christ	
Pension Fund of the Christian Church	
Presbyterian Church (U.S.A.) Foundation	
Reformed Church in America	
Samuel DeWitt Proctor Conference	
Southwestern Minnesota Synod ELCA	
United States Conference of Catholic Bishops	
Wesleyan Church Corp.	
(22 implementation grants ranging from \$798,500 to \$1,000,000)	21,684,737
American Baptist Home Mission Society	
Archdiocese of Indianapolis	
Board of Pensions of United Presbyterian Church in USA	
Christian Church in Indiana	
Church of God Ministries	
Cincinnati Christian University	
Cooperative Baptist Fellowship	
Episcopal Church Foundation	
Episcopal Diocese of Indianapolis	
Evangelical Covenant Church	
Evangelical Lutheran Church in America	
General Board of Pension and Health Benefits of the United Methodist Church	
Mennonite Foundation	
Ministers and Missionaries Benefit Board of the American Baptist Churches, USA	
Missouri United Methodist Foundation	
National Association of Evangelicals	
Pension Fund of the Christian Church	
Presbyterian Church (U.S.A.) Foundation	
Reformed Church in America	
Samuel DeWitt Proctor Conference	
Southwestern Minnesota Synod ELCA	
Wesleyan Church Corp.	
(5 resourcing agency and coordination grants ranging from \$750,000 to \$2,250,000)	5,250,000
Evangelical Council for Financial Accountability	
Indiana University Foundation – Lake Institute on Faith & Giving	
Indianapolis Center for Congregations	
Leadership Network	
National Leadership Roundtable on Church Management	

### Theological School Initiative to Address Economic Challenges Facing Future Ministries

Programs that help theological schools examine and strengthen their financial and educational practices to improve the economic well-being of future pastoral leaders

(16 sustainability grants ranging from \$105,099 to \$125,000) 1,973,299

Asbury Theological Seminary  
Austin Presbyterian Theological Seminary  
Catholic Theological Union at Chicago  
Concordia Theological Seminary  
Emory University  
Gordon Conwell Theological Seminary  
Lancaster Theological Seminary  
Memphis Theological Seminary  
Mercer University  
Mt. St. Mary's College & Seminary  
North Park University  
St. John's University  
Trinity Lutheran Seminary  
Union Presbyterian Seminary  
Virginia Union University  
Wesley Theological Seminary

**Subtotal**  
Religion Grants 159,277,172

**Subtotal**  
Religion Discretionary Grants 15,000

**Total**  
Religion Grants 159,292,172

**Grand Total – All Divisions** 555,639,135

Incentive Grants for Employee Giving 4,427,049

Total – All Grants Approved\* 560,066,184

#### \* Reconciliation to Financial Statements

To reconcile the total of all grants approved with the financial statements, the following adjustments must be made:

Adjustments for decommitments (81,000)  
Adjustments for refunds (987,052)

Net Total – Grant Approvals 558,998,132

# Grant Guidelines & Procedures

**Lilly Endowment receives a few thousand grant requests each year, but we can fund only a small percentage of many worthwhile proposals. These guidelines, formulated over the years by our founders and the Endowment's Board of Directors, govern our grantmaking decisions.**

## Areas of interest

We consider proposals in three program areas: community development, education and religion. We also are interested in initiatives that benefit youth and promote the causes of philanthropy and volunteerism.

## Community Development

Our community development grantmaking focuses primarily on enhancing the quality of life in Indianapolis and Indiana. We grant funds for human and social needs, central-city and neighborhood revitalization, low-income housing, and arts and culture in Indianapolis.

On a statewide level, we routinely offer initiatives to support community foundations and United Ways.



## Education

Our education grantmaking revolves primarily around our interest in improving education in Indiana, with special emphasis on higher education and on programs designed to increase the percentage of Indiana residents with bachelor's degrees. We support a number of invitational grant programs, many of which are aimed at the abilities



of Indiana colleges and universities to increase the state's educational attainment level.

We also support on an invitational basis programs that enhance higher education opportunities for African Americans, Native Americans and Latino Americans throughout the country.

## Religion

Our primary aim in this field is to deepen and enrich the religious lives of American Christians, principally by funding efforts to encourage, support and educate a new generation of talented pastors and to strengthen current pastors in their capacities for excellence in ministry.

We seek to help congregations be

vibrant, healthy communities of faith, and we encourage efforts that make accessible the wisdom of the Christian tradition for contemporary life. We support projects that strengthen the contributions that religious ideas, practices, values and institutions make to the common good of our society. We support theological schools and other educational and religious institutions that share these aims.

Our work in religion is national in scope.

## Youth and Philanthropy

Besides grantmaking in our three principal areas of community development, education and religion, the Endowment also awards grants in support of youth development and to advance and study philanthropy and the nonprofit sector.

Our youth grants support direct-service organizations in Marion County, Ind., build the capacity of intermediary organizations throughout the state, and provide professional development for the staffs and volunteer leadership of these organizations.

Regarding philanthropy, we seek to

support and nurture good stewardship among the trustees and executives of charitable organizations by providing occasional funding for research on the governance and effectiveness of nonprofit organizations. We also support efforts





to advance philanthropy by supporting selective research projects and educational programs focused on charitable giving and fundraising.

### Geographic priorities

In keeping with the founders' wishes, the Endowment gives priority to efforts that improve the quality of life in Indianapolis and Indiana.

This priority applies to grants for community development and elementary/secondary education. Exceptions include occasional funding for national programs that complement or relate to our work in Indiana.

The Endowment's interest in higher education extends to Indiana colleges and universities and nationwide to historically black colleges and universities, Native American colleges and programs to increase access to college by Latino Americans. Grants to institutions of higher learning outside Indiana generally are restricted to programs offered by the Endowment on an invitational basis.

Similar to our work in religion, our support relating to philanthropy and the nonprofit sector is national in scope.

Grants for international purposes are limited to a few United States-based economics and public policy programs affecting North and South American countries.

### Limitations

The Endowment generally does not support the following:

- Loans or cash grants to private individuals. Most grant money is awarded to charitable entities. We do not assist individuals with personal or business-related finances.
- Requests to discharge pre-existing debts of individuals or organizations.
- Healthcare projects.

■ Mass media projects. The Endowment does not typically fund mass media projects and limits consideration to projects that fall squarely within our specific program areas.

■ Endowments or endowed chairs. The Endowment targets its grants for specific purposes. Except in unusual cases involving longstanding grantees or special initiatives, we do not contribute to endowments or endowed chairs.

■ Libraries. Except for special initiatives, the Endowment regularly declines grants to public libraries outside Marion County, Ind.

■ Outside Indianapolis. Requests usually are declined for building campaigns, elementary/secondary education, arts and culture, human service projects, general operating funds and neighborhood projects (except as part of invitational grant programs).

### Application process

If you believe your charitable organization has a request that fits within our guidelines, we suggest that you write us a preliminary letter of no more than two pages. The letter should tell us about your organization, the project you have in mind and the amount of support you will need from us. We respond in writing to all preliminary inquiries. In cases that warrant further consideration, we may ask you to furnish a full proposal. Emailed or faxed requests will not be considered.

### For arts and cultural organizations

**in Marion County, Ind.:** Several local grantmaking foundations have collaborated on the development of a shared grant application form. This form was developed in consultation with leaders of local arts and cultural

organizations with a goal of making fundraising efforts more efficient. The Shared Grant Application Form may be used to apply for general operating support. For specific project requests, the Project Grant Attachment Form may be completed along with the Shared Grant Application Form. While Lilly Endowment will accept these shared forms from local arts and cultural organizations, applicants are not required to use them, and the Endowment reserves the right to request additional information. Links to the forms are on the Endowment's website.

### Approval process

A program director generally reviews grant proposals. Those that meet the criteria for consideration proceed to the appropriate division for review, then to the corporate officers, and finally to the Endowment's Board of Directors. The Board of Directors considers grants in March, June, September, November and December. The grant review process takes three to six months. All grantseekers receive written notification of our decisions.

Please direct correspondence to:



Program Office  
Lilly Endowment Inc.  
2801 N. Meridian St.  
Post Office Box 88068  
Indianapolis, IN 46208-0068

Telephone: (317) 924-5471  
Website: [lillyendowment.org](http://lillyendowment.org)

## Fostering Future Vitality of Indiana Arts and Culture

**AS PART OF ITS LONGSTANDING COMMITMENT** to supporting organizations that improve the quality of life in Indianapolis and in Indiana, Lilly Endowment made special grants in 2015 to 14 arts and cultural organizations to help them secure strong financial futures. Totalling \$100 million, the grants were in addition to the Endowment's annual support of more than two dozen arts and cultural organizations that help make Indianapolis a vibrant community.

The new grants support initiatives that strengthen the organizations' long-term financial well-being so that they can continue to thrive for the sake of the people of Indianapolis and of Indiana. Several of the organizations will use the grants in more than one way to achieve their financial goals.

These grants are just part of the Endowment's commitment to arts and cultural organizations in Indianapolis and across the state.

## Projects include:

- The establishment of new endowments or additions to existing endowments, which will enable organizations to strengthen their operations and plan for the future: American Pianists Association, Dance Kaleidoscope, Eiteljorg Museum, Heartland Film, Indiana Humanities, Indiana Landmarks, Indiana Repertory Theatre, International Center and Josef Gingold Fund for the International Violin Competition of Indianapolis.
- Fundraising capacity-building: American Pianists Association, Conner Prairie and Heartland Film.
- Expansion of programs tied to improved financial results: The Children's Museum of Indianapolis, Indiana Humanities, Indianapolis Museum of Art and Indianapolis Zoo.
- Capital investments in new and renovated spaces to better welcome and engage more people: The Children's Museum of Indianapolis, Conner Prairie, Indiana Humanities, Indiana Repertory Theatre, Indianapolis Museum of Art, Indianapolis Symphony Orchestra and Indianapolis Zoo.



Grantees include Indiana Landmarks, which helped save the Artcraft Theatre in Franklin, Ind. (top), Indianapolis Symphony Orchestra (middle) and Dance Kaleidoscope.

## Acknowledgements

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David Stahl

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Chris Minnick

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Page 21: courtesy of Ministers and Missionaries Benefit Board

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