



LILLY ENDOWMENT ANNUAL REPORT

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About Lilly Endowment

Lilly Endowment is an Indianapolis-based, private philanthropic foundation created in 1937 by J.K. Lilly Sr. and his sons Eli and J.K. Jr. 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 charitable sector.

The Endowment funds programs throughout the United States, especially in the field of religion. A key priority of its founders, 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.

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Collaboration





Since J.K. Lilly Sr. and his sons, Eli and J.K. Jr., founded Lilly Endowment 83 years ago to further the causes of community development, education and religion, the Endowment often has encouraged collaboration among organizations it has supported. In recent years, however, we have noticed that the issues and contexts relating to these areas of focus have become increasingly complex and that, to achieve meaningful progress, collaborative efforts that generate imaginative, new approaches are more and more needed.

Although aligning the values, missions and ways of operating of parties in a collaboration can be challenging, their interactions can stimulate creativity and reveal the strengths each party can contribute to the achievement of shared goals. In good-faith collaborations, parties are both stretched and supported by one another, and there is trust that each collaborator will bring its talents, connections, resources, knowledge and passions to complement what the others provide.

Featured in this annual report are the following stories about efforts the Endowment has funded that involve significant collaboration:

■ Strategic Community Advancement Initiatives

Collaboration is at the center of Endowment-funded regional advancement efforts in three regions of Indiana. The University of Notre Dame, Purdue University and Indiana University are key partners in these efforts in their respective regions, and they are collaborating with community foundations, other educational institutions, area businesses, local governments and others to build regional prosperity and quality of life.

■ Lilly Scholars Network

Since 1997, the Endowment has funded the Lilly Endowment Community Scholarship Program, through which community foundations across the state work with Independent Colleges of Indiana (ICI) to nominate promising high school seniors to

receive full tuition scholarships to attend the Indiana college or university of their choice.

A 2019 Endowment grant to ICI will help strengthen the Lilly Scholars Network, which was created by Lilly scholar alumni to encourage the some 4,700 current and alumni scholars to connect and work together to give back to their local communities and strengthen the state.

■ Indianapolis Neighborhood Housing Partnership

From its inception in 1988, Indianapolis Neighborhood Housing Partnership has collaborated with financial institutions, community-based organizations and local

government to help Indianapolis residents prepare for and become successful homeowners and to build stronger neighborhoods. A special \$26.6 million Endowment grant supports two collaborative programs that realized meaningful progress in 2019: the Anchor Housing Program and the Equitable Transit-Oriented Development Loan Fund.

As we prepared this report, the COVID-19 challenges became increasingly profound and comprehensive. We are grateful for the many ways that charitable organizations we support stepped up with intelligence, grace and resilience to work together to address these challenges. In the early weeks of the crisis, we were pleased to approve nearly \$100 million in grants to help several of them meet urgent basic needs in their communities. Our continued efforts to help in this unprecedented time are highlighted on the Endowment's website.

■ Global Religion Journalism Initiative

This Endowment-funded initiative is fostering collaboration among The Associated Press, Religion News Service and The Conversation US to expand and strengthen significantly fair and accurate religion reporting worldwide.

■ Called to Lives of Purpose and Meaning and NetVUE

The Endowment's Called to Lives of Purpose and Meaning Initiative nurtures collaboration among faith-based organizations that are helping congregations be places where parishioners discover God's call in their own lives. The initiative builds on the experiences of NetVUE, the Network for Vocation in Undergraduate Education, which began 10 years ago to support colleges in their efforts to help students discern their vocations.

In supporting collaborative approaches, the Endowment generally strives not to prescribe the parties to include in a particular collaboration or the design of a collaborative approach. Rather, we seek to identify important issues and

opportunities and then encourage a range of organizations to select others with which to work to address the identified issues and opportunities in ways that fit their unique capacities, needs and missions. We have found that when grantees design their own approaches, they are more likely to be sustained and to have long-term impact.

In addition to the efforts featured in this report, the Endowment in 2019 supported other collaborations that may be highlighted in future reports or on our website. Among them are:

Enhancing Opportunity in Indianapolis, an initiative which seeks to encourage the creation and expansion of promising, collaborative strategies to help people in Indianapolis living in or near poverty make progress toward lasting economic self-sufficiency. Through this initiative, the Endowment expects to provide a total of up to \$50 million in grants in 2021.

Indiana University and Purdue University initiatives, through which each institution is exploring how their students and faculty can become more aware of and better prepared to address the ethical challenges presented by fast-evolving digital technologies, especially in the context of artificial intelligence and big data management. The universities are working together on these initiatives to leverage their research and academic strengths.

Charting the Future, an initiative through which the Endowment is making available grants totaling up to \$108.2 million to help colleges and universities across the state address their key

challenges and take advantage of promising opportunities to enhance their relevance and sustainability, more effectively serve their students and more fully achieve their educational missions. To do so, the Endowment is encouraging Indiana higher education institutions to explore collaborative strategies with one another, with higher education institutions across the country or with other local, regional or national organizations.

Phase VII of the GIFT Initiative for Indiana community foundations, through which the Endowment has allocated \$125 million to help Indiana community foundations in all 92 counties in the state collaborate with each other and broad arrays of other community organizations to prioritize key community challenges and opportunities and develop strategies to address them.

We have been impressed with the imaginative and well-developed collaborative proposals we have received from grantees in each of our grantmaking divisions. In virtually every case they prove the maxim: the whole is greater than the sum of its parts. It is a privilege to be able to support their exemplary efforts to further their important aims.



N. Clay Robbins

Chairman, President & Chief Executive Officer

Reflecting on 2019, we acknowledge with gratitude the following three long-tenured colleagues who retired that year:

Lynn Heckman, a financial associate, retired after 28 years of service. Her work included support for many facets of the Endowment's finance division, including assisting with the Endowment's matching gift program that encourages employees, retirees and board members to give generously to the charitable causes that matter most to them. Lynn previously served in the Endowment's education and community development divisions and in its communications office.

Sue Houk, the Endowment's grants coordinator for community development, retired after 43 years of service. As the longest-serving employee in the Endowment's history, Sue became an expert and historian on the Endowment's work in community development and shared her knowledge of grantees and of the Endowment itself with new generations of colleagues. She was the last Endowment employee whose tenure overlapped with Mr. Eli Lilly's final years of service at the organization he helped found.

Sara Cobb, the Endowment's vice president for education, retired after 22 years of service. For two decades, Sara led the Endowment's broad continuum of grantmaking in pre-K, K-12 and higher education to help improve the educational attainment levels of Indiana's residents, to build the state's intellectual

capital, and to support national initiatives that enhance higher education opportunities for African Americans, Hispanics and Native Americans. She was instrumental in shepherding the success of the Lilly Endowment Community Scholarship Program, which has helped more than 4,700 students representing every one of Indiana's counties receive full-tuition support to attend a college or university in Indiana of their choice.

Throughout their careers here, they reflected their own commitment to collaboration in service to the Endowment's values. We will miss each of these ladies and wish for them much future happiness.



Community Development

Collaborations

Indiana Regions

Community foundations, universities,
industries and other partners work together
to build regional prosperity

SOUTH BEND, IND.

Students and faculty from around the world make their way to the University of Notre Dame, drawn to northern Indiana because of the university's reputation as one of the most prestigious universities in the United States.



While it has long focused on undergraduate education, Notre Dame in recent years has transformed itself into a major research institution that during the last decade doubled its annual investment in research to more than \$220 million.

Now, Notre Dame is putting its resources to work to help drive greater economic growth and prosperity for the South Bend-Elkhart region. With support from a \$42 million grant from Lilly Endowment in 2019, Notre Dame, along with the South Bend-Elkhart Regional Partnership, has created the Labs for Industry Futures and Transformation (LIFT) Network. The collaborative effort is bringing together community foundations in St. Joseph, Elkhart and Marshall counties, local businesses and other educational institutions to:

- **help companies in the area—particularly manufacturers—be more innovative and globally competitive.**
- **broaden the region's economic base by encouraging the development of newer sectors, such as information technology and data analytics.**
- **educate and train more people to be successful in 21st-century careers.**

LIFT is the latest collaboration to be funded through the Endowment's Strategic Community Advancement Initiatives, a series of efforts across Indiana focused on strengthening regional prosperity.

Strengthening Region's Economy

The Notre Dame campus is surrounded by a region whose economy is driven in large measure by manufacturing. For more than a century, this has been a place where people work in factories, making, among other things, cars, tractors and other vehicles and the parts that go into them. Today, the most prominent illustration is the recreational vehicle industry. RV companies in the region, which are primarily located in Elkhart County, produce 80 percent of the RVs sold in the United States and employ nearly 25,000 people. Many of these workers earn wages far above the national average.

Yet, the RV industry and related companies face significant threats to their economic health, including intense global competition and the disruptive forces of automation and other technological changes. Further, the performance of these industries can be volatile: when an economic recession hits, the South Bend-Elkhart region feels the adverse effects more than most areas in the country.

- Workers on the factory floor of manufacturing company ITAMCO in Marshall County, which has joined the LIFT Network (opposite).
- The University of Notre Dame (above).
- A farmer in Tippecanoe County tests new digital agriculture equipment as part the Wabash Heartland Innovation Network (below).





LABS FOR INDUSTRY FUTURES AND TRANSFORMATION (LIFT) NETWORK

Region/Countries:

South Bend-Elkhart/Elkhart, Marshall
and St. Joseph counties

Funded:

April 2019

Grant:

\$42,431,066

Grantee:

University of Notre Dame

Goals:

- Increase productivity by 5 percent for regional industry partners engaged with LIFT Network through technological advancement, operational efficiencies, new product lines and access to broader markets.
- Increase economic resilience by broadening the region's economic base by supporting growth in emerging, high-potential economic sectors, such as IT/data analytics, healthcare technology, aerospace and defense.
- Strengthen the region's talent base by expanding post-secondary credential offerings in advanced industry and STEM-related areas; developing best-in-class K-12 apprenticeship program in the region; and launching a new regional effort to engage students at regional colleges and universities with hands-on experiential learning and capstone projects with regional industry partners.

Community leaders in St. Joseph County and neighboring Elkhart and Marshall counties have been working together during the last several years to strengthen the three-county region, including taking steps to make their economy less vulnerable to inevitable economic downturns. The LIFT grant is designed to strengthen these efforts, with Notre Dame directing increasing levels of research and entrepreneurial activities to help the South Bend-Elkhart region diversify its economy by growing sectors such as IT and advanced data analytics and helping to make existing industries more resilient and productive.

Notre Dame and partners in the South Bend-Elkhart region are augmenting the Endowment grant with \$126.4 million from varied sources during the next five years, investing a total of nearly \$170 million to help the region prosper in the years ahead.

"This generous grant will allow us to help transform the region's cyclical manufacturing economy," says Notre Dame's provost, Thomas G. Burish (above). "The Endowment wasn't in this for the splash. They were in this for the long-term vitality of the community."



Collaboration and Training

LIFT is the sixth Strategic Community Advancement Initiative the Endowment has helped launch since 2007.

These initiatives are designed to encourage collaboration among community foundations, educational institutions and other local and regional partners to improve quality of place and, ultimately, prosperity within regions across Indiana. The primary aim of the initiatives is to better connect and build on regional assets in ways that expand opportunities in so-called "traded sectors," where products and services produced locally are sold outside their home regions. And the

initiatives are helping communities align education and job training with employer needs so that their communities are more attractive places to live and invest.



WABASH HEARTLAND INNOVATION NETWORK (WHIN)

Region/Counties:

Northwest Central Indiana/Benton,
Carroll, Cass, Clinton, Fountain,
Montgomery, Pulaski, Tippecanoe,
Warren and White

Funded:

September 2017

Grant:

\$38,943,732

Grantee:

Wabash Heartland Innovation Network

Goals:

- **Digital agriculture:** Engage farmers and agriculture technology companies to innovate through collaboration with Purdue University and Ivy Tech; develop career-ready certificates and digital training; adopt sensors in agriculture sector.
- **Next-generation manufacturing:** Analyze processes and delivery systems in real time; develop content to help employees use IoT-empowered tools; develop supply chain network model to be used by manufacturers in the region to manage procurement.
- **Quality of life:** Invest in innovative place-making projects that increase education, vitality and prosperity in the region.



Agriculture Embraces Technology

The **Wabash Heartland Innovation Network**, or WHIN, is an initiative launched in 2017 to help a 10-county region around Purdue University become a global center for “Internet of Things” in digital agriculture and advanced manufacturing. Internet of Things (IoT) enables everyday objects as varied as lamps and cars to exchange information through the Internet and is commonly thought to be one of the most important frontiers in technology. The \$38.9 million Endowment grant to Northwest Central Indiana Community Partnerships, Inc. to fund the development of WHIN was designed to encourage collaboration among agriculture companies, community foundations and Purdue and other educational institutions in the region.

Claims of uniqueness can be audacious, but WHIN CEO Johnny Park uses the term confidently. Nowhere in the world, Park asserts, is there a collaboration that includes:

- a university (Purdue) with national top-10 rankings in agriculture and industrial engineering;
- a community college (Ivy Tech) willing to train students in IoT; and
- networks of farmers and of manufacturers willing to test IoT equipment and share what they learn.

“The combination will be alluring to companies needing a leg up on the future,”

says Park, who holds bachelor’s, master’s and doctorate degrees from Purdue in electrical and computer engineering. One such company, Brazil-headquartered ag tech firm Solinftec, established its North American headquarters in Purdue Research Park in late 2018. The \$50 million expansion is projected to create more than 334 jobs by 2022. Solinftec then announced in late 2019 that it was moving its global headquarters from Brazil to West Lafayette. The company cited the deep capabilities of Purdue and WHIN as reasons for the comprehensive relocation to West Lafayette.

“A lot of people are saying data is the new oil of the 21st century,” Park explains. “Ag and manufacturing will be transformed. Our ambitious goal is to leverage our strong assets and develop this region into a global epicenter of digital agriculture and next-generation manufacturing by harnessing the power of Internet of Things technology. We want to lead the charge.”

■ LIFT Network efforts include career and job exploration programs for young people (opposite top) and collaborations to upgrade manufacturing, technology and tools (opposite bottom). ■ WHIN is working to connect farmers with innovation in agriculture and technology (above).

Already, WHIN has organized 20 farmers in the region representing 80,000 acres to vet devices that track soil metrics—including temperature and moisture—in real time. Next up are plans to have manufacturers add sensors to factory floor equipment to predict failures and better inform maintenance schedules and electricity management. And Purdue’s Krannert School of Management is building a database of the hundreds of manufacturers in the region to encourage them to do more business with each other and reduce purchases of parts from outside the state.

Recognizing that quality of life is critical to attracting and retaining companies and talent, WHIN also is funding projects throughout the region that will enhance community vitality. For example, WHIN is helping to fund the development of a 90-mile bike and pedestrian trail near the Wabash River.

A Plan for the Bloomington Region

One hundred miles south of the Lafayette area, another Strategic Community Advancement Initiative is producing results in eleven counties in and around Bloomington. Kicked off in 2015 with three grants totaling \$42.2 million, Indiana Uplands is an initiative that has:

- **implemented an education and workforce plan and a regional opportunity fund for quality-of-place investments funded by a \$25.87 million grant to Regional Opportunity Initiatives, Inc. (ROI). ROI is a charitable organization focused on enhancing prosperity in the eleven-county region. Led by a regional board of directors, ROI is affiliated with the Community Foundation of Bloomington and Monroe County.**
- **launched the Indiana Innovation Institute (IN3) with a \$16.2 million grant to the CICP Foundation. IN3 is working to drive new regional economic opportunities near the Naval Surface Warfare Center, Crane Division (NSWC Crane). Indiana University, Purdue University, other academic institutions and private industry are working together to commercialize technology invented at the federal research facility. The goal: create businesses and jobs.**
- **helped Indiana University to explore the potential development of a Rural Center at Indiana University to study and address societal challenges found in rural communities.**

Universities Provide Leadership

As Indiana University and Purdue University are important anchors for the work in their respective regions, Notre Dame is a catalyst in the South Bend-Elkhart region. But the university cannot do it alone. Much of the job training and outreach to companies will be conducted through the South Bend-Elkhart Regional Partnership. Ivy Tech is an important partner that will help employees in existing manufacturing companies upgrade their skills to meet the demands of new technologies.

“Cooperation with industry wouldn’t have been as effective prior to Notre Dame’s relatively recent emphasis on research,” says Tom Fuja (above), the dean of Notre Dame’s College of Engineering and faculty director of industry labs, which is the center of LIFT efforts on campus. LIFT is organizing its engagement into an easily accessible program offering use of sophisticated research equipment, such as electron microscopes. And Notre Dame students will fan out across the region to connect with businesses through a variety of experiences, including internships.

“We want this to be the front door to local companies,” Fuja says. “A lot of these kinds of arrangements tend to be one-offs now, word-of-mouth. We want to make this standardized.”

Notre Dame has ambitious goals for LIFT during its first five years. Among them: help launch 24 start-up businesses; assist 40 companies to improve productivity; develop nearly 1,400 new internships connecting undergraduate students to meaningful work in the region; and help at least 75 Notre Dame graduates in science, technology, engineering and mathematics launch their careers in the region.



INDIANA UPLANDS

Region/Counties:

Southwest Central Indiana/Brown, Crawford, Daviess, Greene, Dubois, Lawrence, Martin, Monroe, Orange, Owen and Washington

Funded:

December 2015

Grants:

\$42,217,600 (total of three grants)

Grantees:

CICP Foundation
Indiana University Foundation
Regional Opportunity Initiatives

Goals:

- Incubate and develop the Applied Research Institute at WestGate@Crane Technology Park (renamed Indiana Innovation Institute – IN3—in 2018)
- Develop the Center for Rural Engagement
- Support Regional Opportunity Initiative's Advancing Education and Workforce Through Career Immersion programs



Formidable Headwinds

The work of LIFT will need to be significant. While the region has important assets, it also faces critical challenges. In South Bend, it has been nearly 60 years since Studebaker made its last automobile in the iconic factory on South Lafayette Boulevard. And in 1966, the company closed for good. Even though the factory and nearby Studebaker headquarters building are being repurposed into spaces for entrepreneurs, South Bend has not rebounded from the loss of Studebaker and the subsequent closure of other heavy manufacturing plants in the area. In Elkhart, manufactured housing, a close cousin of recreational vehicles, has shrunk, and Conn-Selmer, a major musical instrument maker, has shifted much of its production out of the United States.

As if to sharpen the point, Brookings Institution issued a landmark report in early 2019 ranking Elkhart-Goshen third among 381 metropolitan statistical areas in vulnerability to automation and artificial intelligence. The prominent think tank also assigned Indiana an ominous crimson color on a national map of vulnerable states. Taken together, the report paints the Elkhart area as top-heavy with an industry that is among the least prepared for the future in a state highly susceptible to technological disruption.

Fortunately, leaders in the region already were thinking collaboratively. In 2015, four years before Notre Dame launched the LIFT Network, the South Bend-Elkhart Regional Partnership received a \$42 million Indiana Regional Cities grant from the Indiana Economic Development Corp., an arm of the state. The funding has sparked 40 regional development projects totaling \$736 million in investment.

Perhaps more important than the projects, the Regional Cities grant helped establish a new frame of mind, that has been strengthened by the development of LIFT, according to Pete McCown, president of the Community Foundation of Elkhart County. Leaders are realizing that the best chances for their communities to succeed depend on their working together.

“We’re excited about the momentum we have and feel like our region is poised to thrive in the 21st century,” McCown says.

Notre Dame is committed to LIFT for the long term. Burish, the provost, recalls the Endowment asking Notre Dame how it could sustain the initiative beyond its initial five years. Burish responded that the university is committed to raising money needed to ensure that LIFT continues to have an impact for many years to come. To encourage the effort, the Endowment’s grant to Notre Dame is providing a \$4 million match for funds Notre Dame raises to sustain LIFT.

Burish was especially grateful for the way the Endowment engaged Notre Dame and other organizations in the region in the development of the project. “The Endowment provided insights that helped us refine our approach, encouraged us to think long-term,” Burish says, “and to put collaboration at the center of it all.”

■ A student at Vincennes University's Jasper campus works in a lab at the university's Center for Technology, Innovation, and Manufacturing (opposite). Vincennes University is collaborating with Indiana Uplands. ■ Networking events for businesses, educators and innovators (above) are hallmarks of the South Bend-Elkhart region's LIFT Network.



Community Development

Opening Doors for Would-be Home Buyers

**Program Brings Nonprofit Employers and Their
Workers Together to Build Stable Neighborhoods**

There's a sign in the office lobby of Indianapolis Neighborhood Housing Partnership (INHP) that reads:

"The vision of INHP is that every person in Indianapolis has the opportunity to live in a safe, decent and affordable home in a vibrant neighborhood."

Jamila Fann is one of those individuals who reflects that vision. In 2016, she and her husband Jamichael bought their eastside Indianapolis home where they're now raising two young daughters. Jamila credits INHP for that. "I didn't know what went into homeownership," Fann says. "INHP provided the information and guidance I needed."

For more than 30 years, INHP has been providing support and encouragement through a variety of programs to aspiring and current homeowners throughout Indianapolis, with the goal of increasing access to affordable housing available to low- and moderate-income residents and improving existing housing stock by helping to fund home repairs and upgrades.

Since an initial grant in 1988 that helped INHP get started, Lilly Endowment has been supporting INHP's mission with program and general operating funds on a regular basis.

In 2015 timing was right for a grant that would leverage INHP's collaborative approach to further strengthen efforts across Marion County. That's when the Endowment approved a \$26.6 million grant that INHP president and CEO Moira Carlstedt calls "transformational."

"From the beginning, we have worked to offer residents the skills and guidance they need to overcome the real and perceived barriers they face in becoming long-term successful homeowners. This grant is giving us the ability to expand what we do to the other side of the housing equation, which is 'place.' It's helping us address the negative forces that affect the supply of affordable housing and neighborhood quality of life," Carlstedt says. "We have new partners—employers who run nonprofit organizations that are vital to thriving neighborhoods, developers who want to help create affordable housing in places where mass transit is strengthening our city, and neighborhood groups and other organizations working to make Indianapolis a great place to live for all of its residents."

The grant has helped INHP develop affordable housing programs that are breaking new ground in Indianapolis. Two of them—the Anchor Housing Program and the Equitable Transit-Oriented Development (ETOD) loan fund—made significant strides in 2019 to provide more housing options to low- and moderate-income individuals and families.

Anchor Housing Program

According to Joe Hanson, INHP's executive vice president of strategic initiatives, the Indy Chamber and INHP in 2016 began to collaborate on an opportunity for Indianapolis: help large nonprofit institutions—hospitals, universities and cultural organizations—embrace their roles as anchor institutions that can provide stability, leadership and other resources in their neighborhoods.

The chamber and INHP identified three arenas in which to collaborate. The first was housing—to support anchor institutions in helping their employees buy homes close to where they work. The second was purchasing—to improve anchor institutions' purchasing of products and services locally. The third was hiring—to encourage anchor institutions to identify, train and hire employees from their neighborhoods.

To help anchors with housing, the chamber turned to INHP. The result was the Anchor Housing Program, which prepares interested employees of anchor institutions for home ownership, then helps them with down payment assistance. Half of the money for these down payments come from INHP and half from a participating anchor institution. Mortgages INHP helps borrowers secure are below market rate. Furthermore, employees who already own their own homes are able to receive funding to make home improvements.

"Our mission is people- and place-based," says Hanson. "Our focus is on helping people get access to affordable housing. If we can help them live close to where they work, that's even better."



■ Jamila Fann and her family (opposite) became homeowners with support from INHP. ■ A vacant lot near 22nd and Illinois streets in Indianapolis (above) is part of INHP's work to develop affordable housing through its Equitable Transit-Oriented Development loan fund.



One of the institutions that was eager to take part in the Anchor Housing Program was Community Hospital East, which is a bedrock of the regional healthcare provider Community Health Network. The hospital is located on the eastside of Indianapolis, in an area where its presence and investments have sparked neighborhood revitalization in recent years. “We do a lot of outreach on the eastside,” says Joe Housh, Community’s director of human resources, “so the Anchor Institution Housing Program seemed like a natural fit.”

The relationship between INHP and Community began in earnest in 2017. To introduce the program to employees, Community hosted a series of INHP classes to help with everything from budgeting and improving credit scores to applying for a mortgage. This was especially useful to employees who came from families in which no one had owned a home.

“Generally, the down payment is the biggest issue for people buying their first home,” Housh says. “Through the Anchor Institution Housing Program, Community provides half and INHP provides half—it’s in the form of a loan that’s forgivable after five years.”

One Community employee who took advantage of the Anchor Housing Program was Linda Miller, a life skills clinician who bought her eastside home through the program. “To be able to be in a community that is rebuilding itself and growing means a lot to me,” Miller says in a promotional video the hospital created. The fact that Community helped her become a homeowner strengthened her bond with the hospital. “For me, it feels like I’m important to them and that they value their employees.”

Hanson credits the hospital’s strong leadership and entrepreneurial spirit for making the partnership with INHP work.

“They communicated well with their employees about the program,” Hanson says. “They made information about INHP and this program easily available.”

Though Jamila Fann, who works as a lead supervisor of community health advocates for Community, and her husband bought their home before the Anchor Housing Program was available, they used INHP’s services. Her success led her brother, brother-in-law, mother-in-law, and a friend to buy homes with similar guidance from INHP.

“The fact that I’m a first-generation homeowner has inspired other people,” says Fann, who now volunteers with INHP as a family ambassador.

By the end of 2019, nine Community employees had purchased homes through the program and three had repaired the homes they already owned in the neighborhood. The total investment provided to those 12 employees was \$229,000.

Equitable Transit-Oriented Development Loan Fund

For low- and moderate-income individuals and families, a lack of reliable, efficient transportation can be an obstacle when looking for affordable housing. INHP looked around the country for how other cities were addressing the need to make housing more affordable. INHP liked what they learned in Denver, where city leaders in 2010 created one of the nation’s first loan funds to help develop affordable housing near transit lines. Through its fund, Denver achieved nearly 1,000 affordable housing units near transit during a five-year period. In 2018, INHP adapted the approach to Indianapolis to create the Equitable Transit-Oriented Development (ETOD) loan fund. INHP’s

lead partner in the effort is Cinnaire, a nonprofit community development financial organization based in Lansing, Michigan.

INHP used funds from the Endowment grant to establish the fund, then leveraged equity investments from the city and JPMorgan Chase to raise more than \$8 million in capital from seven local banks. Cinnaire administers the fund, with INHP as the only loan recipient. INHP uses loans from the fund to buy properties near transit lines for future affordable housing development.

According to Charlie Mercer, INHP's director of commercial and community lending, the value of property along or near major bus routes will continue to appreciate as the city improves its transit services. In 2019, Indianapolis realized the first major mass transit upgrade in a generation with the opening of IndyGo's Red Line. The rapid bus line runs 13 miles through the city, from the University of Indianapolis on the southside to just north of the Broad Ripple neighborhood. Two additional rapid bus lines are expected to be completed in the coming years. Buying property now and holding it for future development is the primary way to ensure affordable, multi-family housing will be available to the very people who most need access to public transportation.

"We look at transit lines as providing low- to moderate-income people with access to jobs, school, healthcare, grocery stores, pharmacies, the arts," says Rick Laber, Cinnaire's executive vice president of new ventures and product management. "That's access that people with higher incomes may take for granted."

By buying transit-proximate properties, INHP is creating what amounts to a land bank, Mercer says. "We're stepping in to preserve those locations. We're not actually developing them ourselves—we're just holding on to them until we find developers to do that."

Once INHP finds a site and gets it under contract, it applies to Cinnaire for funding to purchase it. "When they apply for a loan from the fund, we know they've already done everything they can to make sure it's a worthwhile site," says Zina Risk, Cinnaire's vice president of underwriting.



■ Jamila Fann and Joe Housh (opposite) work at Community Hospital East, which participates in INHP's Anchor Housing Program. ■ Top, from left: Michael Osborne of the Near Northside Development Corporation and Moira Carlstedt and Charlie Mercer of INHP. ■ Jamila Fann and her family (below, next page) are inspiring friends and coworkers to become INHP clients.



According to Risk, when INHP applies for a loan for a specific property, Cinnaire has the site appraised and makes sure the property is not in a flood zone or has any other problems that would affect its development.

Essentially, the ETOD fund is a line of credit for INHP, Laber says. Cinnaire loans INHP money from the fund to acquire the property, then INHP finds a developer willing to buy the property and build affordable housing on it. With the money it receives from the developer, INHP then pays off the ETOD loan, which makes the money available for future loans.

At the end of 2019, the ETOD fund had helped INHP buy six properties, with others pending. One property is near the intersection of Illinois and 22nd streets. It abuts a parcel to the north owned by the nonprofit Near North Development Corporation (NNDC). Having worked with NNDC in the past, INHP granted the organization an option to buy the land.

In turn, NNDC selected Real America Development as its partner to help develop the properties. Plans call for 60 apartments affordable to lower- and moderate-income individuals, with an additional 4,000 square feet of nonresidential space on 22nd Street that will include the building's management and maintenance facilities, as well as NNDC's office.

"By acquiring key parcels in up-and-coming areas, before land prices become prohibitively high, INHP can ensure affordable housing won't be left out of the discussion about redevelopment in those areas," says NNDC president Michael Osborne, who is also a former INHP board member. "INHP and the ETOD fund are critical. Their ownership not only provides control of the land, but it also provides community development organizations like NNDC with the time to put together plans, the complex financing, and the development partners to undertake affordable housing projects."

"What makes the ETOD fund work well is the fact that it was a well-thought-out plan" Laber says. "We really didn't know INHP at all until we started talking with them about establishing the fund in 2015. We've spent a lot of time with them since then, and we've come to have a lot of respect for them, as an organization and as people. They know what they're doing, they're committed to doing it well and to providing access to affordable housing to people who need it."

Housing Challenges Continue

Though the Anchor Housing Program and ETOD fund help address affordable housing needs in Indianapolis, there remains a widening gap between availability and affordability.

"The people we serve are working families," Carlstedt says. "They generally earn between 50 and 80 percent of the median income for our region, which is \$36,000 to \$57,500 for a family of three. That means they can afford a home priced between \$75,000 and \$140,000. But the median home sales price in Marion County in June 2019 was \$165,000. As housing costs rise, it becomes more and more challenging to find a home in decent condition in an area where families want to live. It's a difficult problem to solve."

The solution lies in continuing to strengthen the partnerships that have helped INHP develop the Anchor Housing Program and the ETOD loan fund, according to Carlstedt. "The individuals and families we serve are our partners in strengthening our community and so are the neighborhood groups, employers, city agencies and financial institutions that believe in this work, too. We couldn't do it alone."





Education

Lilly Scholars Network

Links

HIGH ACHIEVERS to Each Other and Indiana

"If I can pay [it] back in some small way by being involved in improving life in Indiana, I think I have that responsibility and desire to try to make a difference."





Isaac Janson distinctly remembers the day in 2002 when, as a high school senior in South Bend, Ind., he learned that he had been awarded a Lilly Endowment Community Scholarship.

A big weight lifted from his shoulders, Janson recalls. The scholarship paid for four years of tuition at Purdue University and enabled him to earn his undergraduate degree without massive student loan debt, which eased the financial considerations of entering a Ph.D. program in materials engineering at the University of Michigan.

Today, the feeling is one of gratitude. “It was absolutely a phenomenal opportunity and an honor to receive the scholarship,” says Janson, who has since returned to Indiana and works in a research role with the Indiana Hemophilia & Thrombosis Center in Indianapolis. “If I can pay that back in some small way by being involved in improving life in Indiana, I think I have that responsibility and desire to try to make a difference.”

Janson and other Lilly Endowment Community Scholars have turned their gratitude into action through the Lilly Scholars Network. In 2006, Lilly Scholars from Butler University and Wabash College started the grass-roots organization with two main objectives: giving back to the community and creating a network of scholars from across Indiana.

To support the Lilly Scholars Network and help it grow, the Endowment in 2019 made a \$1.05 million grant to Independent Colleges of Indiana (ICI). The funding will enhance and expand the ways current and alumni scholars can serve and lead in the Indiana communities they call home, including where they live now, their hometowns and the towns and cities where they attended college.

The grant builds on the successful statewide scholarship program that the Endowment launched more than two decades ago. Based on its long-held belief that education at all levels is important to the personal, civic and economic well-being of Indiana, the Endowment created the scholarship program to encourage talented students to attend college in their home state.

Though the program is administered by ICI, community foundations serving each of Indiana’s 92 counties play a significant role in the program. The community foundations establish their own criteria for the full-tuition scholarships, which also fund fees and book stipends for four years at any accredited, four-year public or private Indiana college or university chosen by the scholar. Indiana high school students apply for the scholarships through their local community foundations.

More than 4,700 students have received the scholarships since the first were awarded in 1998, who represent a deep, diverse pool of talent.



"Deeply personal"

Like Janson, Domini Martin-Urban was considering leaving Indiana for college when she was awarded a Lilly Community Scholarship in 2008. Although she was attending Canterbury High School, a private high school in Fort Wayne, Martin-Urban lived in an underserved part of Fort Wayne, and was keenly aware of the challenges and disadvantages facing her peers.

"At first, I was pretty convinced my best shot at better economic opportunity was outside of the state," she says. "But I really wanted to change what my neighborhood looked like, and that's difficult to do from afar."

The Lilly Endowment Community Scholarship allowed Martin-Urban to attend Indiana University, where she earned a degree from the top-ranked Paul O'Neill School of Public and Environmental Affairs, studying abroad in both France and Australia and interning for a semester in Washington, D.C., along the way.

"The impact of the scholarship was really profound," Martin-Urban says. "I could study at one of the best public affairs programs in the country, and study abroad—not once, but twice. I didn't have to worry about debt, so I was able to pursue jobs I was interested in and could learn from, instead of worrying about paying off student loans."

Martin-Urban did just that, working as a field organizer for political campaigns, as a sales consultant, and as associate director at Northeast Indiana Regional Partnership, where she combined her interest in education and community development with a love and appreciation for her hometown of Fort Wayne.

Now living in Indianapolis, Martin-Urban manages the human capital side of Indianapolis' development efforts as project manager for Develop Indy and helps lead the Indy Chamber's work on talent initiatives. But she maintains her connection with the Community Foundation of Greater Fort Wayne by serving as a reviewer of Lilly Endowment Community Scholarship applications. For the last seven years, she has served as a "big" with Big Brothers Big Sisters of Central Indiana and is proud of the accomplishments of her "little sister" and the teenager's mother, who have both worked to improve their lives through education.

"It's very important for me to live out the goals I set for myself as a Lilly Scholar, both as a volunteer and through my day job," Martin-Urban says.

"I'm very thankful that the scholarship enabled me to stay in Indiana and use what I learned to further the mission of growing and keeping talent here and to help our communities succeed and compete on a global level," she says. "It's my professional mission, but because of my background and experiences, it's also deeply personal."

Lilly Scholars like Martin-Urban demonstrate a unique level of commitment in their professional and civic work, according to Janson, who serves as chair of the all-volunteer Lilly Scholars Network Advisory Council.

"We want to capture that energy to fuel positive and noticeable change throughout the state," he says.

"I'm very thankful that the scholarship enabled me to stay in Indiana and use what I learned to further the mission of growing and keeping talent here and to help our communities succeed and compete on a global level."



A common thread

Fueled by the new Endowment grant, ICI is collaborating with Indiana Humanities to help the Lilly Scholars Network engage current and alumni scholars in three ways: connecting them to service projects across the state; helping them learn about significant challenges facing Indiana; and strengthening their leadership skills so they can help improve the quality of life in Indiana communities.

■ The Lilly Scholars Network Summit in 2019 gathered alumni of the Lilly Endowment Community Scholarship program and current scholars for workshops on community engagement, service and leadership (page 15, opposite and above). ■ Kristen Fuhs Wells (opposite top, left) and Mary Dickerson (opposite top, right) are helping to coordinate the network.

The grant expands upon the foundational work of organizers like Bryana Schreiber, a 2008 Butler University graduate from Posey County who helped start the Lilly Scholars Network with a small group of fellow scholars in 2006.

Schreiber, who majored in integrated communications at Butler, recalls the group quickly found a shared interest in bringing together scholars so they could express their gratitude through community service and work together to find other opportunities for community engagement.

“Beyond providing funding for college, the Lilly Endowment Community Scholarship was empowering because it showed me that my community believed in me,” says Schreiber. “I felt—and still feel—driven and compelled to pay it forward. I think this is a common thread among the Lilly Scholars who have participated in the Lilly Scholars Network.”

In 2012, the Lilly Scholars Network Alumni Board was formally established to provide support for collegiate chapters and expand the reach of the organization. “It has been a great platform to make connections, serve as leaders in a community, and show how incredibly grateful we are for the opportunities provided to us as Lilly Scholars,” Schreiber says.

Since its founding, the Lilly Scholars Network has hosted an annual gathering in Indianapolis to bring together current and alumni Lilly Scholars from around the state for learning and service.

In September 2019, Lilly Scholars gathered for the “Innovate Summit,” with a keynote address by entrepreneur Santiago Jaramillo, CEO and co-founder of Emplify, an Indiana-based software company that helps companies build cultures of workplace engagement. Summit organizers introduced 15-minute roundtable discussions with six leaders who offered perspectives about diverse topics. The topics included K-12 education, the environment, opioid misuse, community foundations and nonprofits, and poverty and mental health. Scholars also worked together to paint a mural with guidance from Big Car Collaborative, the Indianapolis-based arts organization that has deep roots in the Garfield Park neighborhood.

“Sometimes it’s difficult to stay on top of the issues in our community,” Janson says. “If we can get scholars talking to each other, friends and family, and government leaders, we may be able to give back to our communities in big and small ways.”

The most recent summit is evidence of how the Lilly Scholars Network continues to evolve, according to Mary Dickerson, who works with the organization as part of her role as director of programs for ICI.

To continue those efforts, the Lilly Scholars Network is creating a digital platform to connect current and alumni scholars, share community service and leadership development opportunities, and host issue-focused events around the state to inform scholars about the challenges facing Indiana and the strategies being used to address them. Plans also are in place to establish a leadership training academy and offer a “mini-grant” program to network members who have specific ideas about projects to help their communities.



Lilly Scholars for life

Previous Endowment grants in 2017 and 2018 to Indiana Humanities supported the foundational research for revamping the Lilly Scholars Network, which included a survey and focus groups of current and alumni scholars. Among the findings:

- **89 percent of current and alumni scholars say that the Lilly Endowment Community Scholarship Program created or increased their awareness about their community foundation and awareness about the importance of giving back**
- **66 percent agreed that the scholarship increased their commitment to Indiana's future**
- **Scholars are more likely to take action on issues or causes that they care about than their millennial peers, such as serving on the board of an organization, volunteering, contacting political representatives, voting, changing the way they purchase products and services, and more**
- **61 percent of alumni continue to live in Indiana**
- **43 percent of scholars who have left Indiana plan to return**
- **Scholars outperform the norm in educational achievement: 30 percent have master's degrees and 18 percent have doctorates. That compares to U.S. Census data that finds 10.9 percent of Americans age 29 to 34 and 13.8 percent age 35 to 44 have advanced degrees beyond a bachelor's degree.**

None of this is a big surprise to Indiana Humanities Vice President Kristen Fuhs Wells, who describes Lilly Scholars as “high-achievers, talented, accomplished, and committed.”

Fuhs Wells, a native of Spencer, Ind., knows of what she speaks: She received a scholarship after being nominated by the Owen County Community Foundation in 2001, but she bases her observations on Indiana Humanities' research, as well as the scholarship recipients she meets through the network.

“I see so many young scholars who are passionate about service in their communities and state,” she says. “I’m excited about the new role the network can play in connecting them with each other and providing the resources they need to help propel Indiana forward.”

That’s true for Lilly Scholar alumna Katie Goodrich, who received her scholarship in 2013 after being nominated by the Legacy Foundation, Lake County’s community foundation.

Goodrich says she’s always had important ties to community service. She grew up in Hammond, Ind., where she benefited from summer camps and Girl Scouts, and volunteered as a high school student. “I always wanted to give back,” she says.

Like Schreiber, Goodrich attended Butler University with the Lilly Community Scholarship, taking her activism with her. She volunteered at food banks, a women’s shelter, and with Keep Indianapolis Beautiful, and, as an intern at ICI, connected with the expanding Lilly Scholars Network.

After graduating from Butler, Goodrich left Indiana to join the national service program AmeriCorps. She traveled the West Coast in a 15-passenger van, sleeping on cots, and working with fellow AmeriCorps team members at several nonprofit organizations. At one worksite, she learned to use a chainsaw helping a community in the foothills of the Sierra Mountains that was affected by a forest fire.

Now back in Indiana and in her first full-time professional job in the Office of Scholarships at Indiana University in Bloomington, Goodrich is happy to find connections again through the Lilly Scholars Network.

“It’s so beneficial to know people throughout the state, and the beauty is that, among Lilly Scholars, so many are doing great things in the areas of environment, poverty relief, and education,” Goodrich says. “If you put enough Lilly Scholars in a room, I am sure that there is no problem we can’t help solve.”



Lilly Scholars Network will put that theory to the test, offering Lilly Endowment Scholars the opportunity to “be a Lilly Scholar for life,” according to Fuhs Wells.

“Through the Lilly Scholars Network, the scholarship is more than a scholarship,” she says. “It provides the tools and resources for individuals to become changemakers.”

■ Indianapolis’ Garfield Park was the location for the 2019 Lilly Scholars Network Summit (opposite), which featured artmaking with Big Car Collaborative and workshops (above).



Global Journalism Initiative Builds Partnership to Strengthen Religion Reporting



■ A priest blesses the faithful at Holyrood Episcopal Church, a multi-lingual congregation in New York City that serves both the hearing and deaf in English and Spanish services (above). ■ Police guard a shrine in Shringar, India, while Kashmiri Muslims pray on the anniversary of the Prophet Muhammad's birth (left).



For Diane Winston, a nationally recognized scholar on the role of religion in media, it's impossible to ignore the many ways religion influences national and global affairs.

"Religion looms large in almost every aspect of society, particularly in the United States," says Winston, who holds the Knight Chair in Media and Religion at the Annenberg School for Communication and Journalism at the University of Southern California. "The intersection of religion and politics, for example, has been very clear. But that's not the only place where religion is front and center."



“Religion reporters know the context, the history and the meaning of the language that people of faith speak. We work to help the public understand how religion matters when we cover the events unfolding each day.”

Winston cites a series of national and global news events with religious implications, including the treatment of non-Orthodox Jews in Israel, refugee crises in Europe and in Latin America, and the struggles among Muslims in the Middle East. Even views about climate change policy can be influenced by a person’s religious convictions about how people care for the Earth, she says.

That lens—a clear view of how religion plays a role in daily news events—is shared by many journalists trained to cover religion as a beat, according to Bob Smietana, editor-in-chief of Religion News Service (RNS), an independent nonprofit news organization that has been dedicated to religion news coverage for more than 80 years.

“Being a religion reporter is like being an interpreter. If someone translates a document for you word for word from English to Spanish, for example, you would get the gist of the document. But you may not understand what it means fully,” Smietana says. “Religion reporters know the context, the history and the meaning of the language that people of faith speak. We work to help the public understand how religion matters when we cover the events unfolding each day.”

Yet, during the last two decades, economic forces have severely disrupted U.S. news organizations. News operations once significantly funded by paid advertising now must reckon with digital communications and new ways of measuring what kinds of content interests audiences. According to a Pew Research Center report issued in 2019, newsroom employment in the U.S. dropped by 25 percent between 2008 and 2019—a loss of about 28,000 jobs.

“News organizations have had to adapt to digital forms of storytelling, where use of social media and webpage clicks have pushed for up-to-the-minute coverage of a story,” Smietana says. “Often, religion reporting, which requires explanation and context and the expertise of a journalist who understands religion, doesn’t lend itself to shorter, clickable content. It works for a political horse race or for breaking news but not for religion reporting.”

As a result, news media companies have cut back on religion content. Fewer reporters are dedicated to covering religion in 2019 than even a decade earlier says Winston, who calls the decline in coverage alarming. “In a time when religion looms large we have seen the ranks of religion journalists shrink,” she says. “But to be well-informed in 2020, you need to know more than just the surface of these issues. We don’t dare ignore it.”

on youth and faith; an investigative reporter in religion; two visual journalists; and a reporter based in Cairo who is covering Islam around the world. At RNS, which has benefited from Endowment grants for religion reporting since 2000, the Global Religion Journalism Initiative grant is supporting the work of the managing editor, a national reporter and a reporter based in Rome who covers the Vatican. At The Conversation US, the grant is helping to fund two religion editors who are strengthening the organization’s coverage of religion and ethics, which began with support from a \$1.3 million 2016 Endowment grant.

Because of the collaborative nature of the initiative, RNS reporters and editors are working together in New York and in Washington with Stapleton and her colleagues at The AP. RNS news stories are posted through The AP’s newsroom portal, which members and subscribers access. Additionally, news organizations worldwide receive a select number of RNS stories to complement The AP’s service. Also, news outlets that are subscribing to Religion and Faith, the new religion service at The AP, are benefiting from RNS content.

“This is the right time for this initiative,” says Stapleton, an experienced journalist who recalls a time when most newspapers, no matter the size, were staffed with religion reporters. “Even as digital communication has created a more interconnected society, we’re less educated about what’s going on with beliefs and ethics worldwide at a time that it matters the most. In many ways we feel more fractured.”

Stapleton suggests one cause of that division is increasingly aggressive commentary that can dominate social media. The Global Religion Journalism Initiative is dedicated to balanced, fair and accurate reporting—about religion in the news and about people of faith—focused on increasing the public’s understanding of religion.



Grant seeks to significantly expand religion reporting

Support to increase the volume, quality and reach of religion reporting is at the heart of a \$4.9 million Endowment grant to develop the Global Religion Journalism Initiative, a collaboration among The Associated Press (AP), RNS, and a third news partner, The Conversation US, which provides explanatory journalism from academic authors. The grant was awarded to the Religion News Foundation (RNF) that supports RNS, to help fund the costs for the 18-month startup phase, including the hiring of religion reporters, editors and other staff members.

Through the initiative, The AP appointed Sally Stapleton as the global religion editor leading a new team of eight religion journalists who report on faith and its influence throughout the world. The grant helped The AP hire Stapleton plus a religion news editor; a religion and politics reporter; a journalist focusing

■ Hasidic Jewish leaders gather during the International Conference of Chabad-Lubavitch Emissaries in New York (opposite). ■ A Buddhist man lights an oil lamp and prays at a temple on the outskirts of Colombo, Sri Lanka (left). A young worshipper attends a prayer service in Santa Rosa, Brazil, a remote village in the Amazon Rainforest (below).



“At the end of the day, the public is now getting access to really well-written and fact-based information”

Collaboration is central to strengthening that approach, so editors from the three publications gather by video conference each Friday to discuss coverage plans and how each organization’s journalism can contribute. Coverage produced in 2019 featured such overarching themes as religious organizations that face institutional change, the role of religion in conflicts around the world, and the religious and spiritual experiences of ordinary people.

Success is in the work

Reflecting on 2019, leadership at both The AP and RNS highlighted a multimedia story about worship among people who are deaf. It’s an example of how cooperation can bring success. The story focused on Holyrood Episcopal Church-Iglesia Santa Cruz in New York City. RNS reporter Luis Andreas Henao told the story about parishioners who believe, as he wrote, “that what might be considered a limitation has strengthened their sense of community and expanded their understanding of God and the sacred gift of silence in a noisy world.”



“We mentioned it to The AP, and the editors there were excited to capture video for the project,” Smietana recalls. Then, editors at The Conversation US connected with the story. One of their contributors, Jana Bennett, a professor of religious studies at the University of Dayton, authored a personal essay about her research into how people with hearing loss engage their faith through unique forms of worship and prayer. The project was distributed to several thousand of The AP’s members and customers worldwide.

As part of the initiative, The AP is tracking religion stories produced through the collaboration and the reach of those stories across the national and international network of AP member news organizations. And The AP is keeping an eye on the number of other news organizations that subscribe to Religion and Faith, the new service that offers religion-specific content from The AP, RNS and The Conversation US. Stapleton says she is hopeful that the collaborative approach will increase the value of religion content to news organizations.

It’s already happening among journalists at AP bureaus around the world. They’re embracing the increased emphasis in religion coverage by adding their own stories to the mix and reaching out to new colleagues with expertise in religion to enhance those stories. Inspired by the initiative’s quality at The AP, journalists in Paris stepped up with a Christmas feature in 2019 about the venerable 855-year-old Cathedral de Notre Dame, which had been nearly destroyed by fire earlier in the year. “This is the first time since the French Revolution, that there will be no midnight Mass (at Notre Dame),” the cathedral’s rector told the AP reporter.

Leveraging relationships to expand reach

For The Conversation US, the new religion reporting collaboration is an opportunity to expand the reach of its work: promoting explanatory journalism produced by academic authors from colleges and universities across the United States.

The Conversation began in Australia in 2011. It launched in the U.S. in 2014, focusing on arts and culture, government and politics, environment and energy, education, science and technology, business and economics, and health, adding religion and ethics content two years later.

In 2019, religion content from The Conversation US was republished in media outlets as varied as Fox News, MSNBC, the *San Francisco Chronicle*, the *Chicago Tribune*, CNN, and *The Washington Post*, according to Bruce Wilson, chief innovation and development officer for The Conversation US.

Wilson says the impact of the Global Religion Journalism Initiative has the potential to be far-reaching, especially in addressing divisions across the United States. “People don’t typically get access to

objective, evidence-based, well-sourced content about religion,” he says. “Often it is very opinionated. A lot of the media generated is playing to segmented audiences, giving people the information they think they want.”

All of us are “attempting to bring really good content to the public that brings hope and objectivity,” Wilson says. “It allows people to see things from different perspectives. We will distribute the same news to the left, right, red, blue, urban and rural. They all will have access to the same objective journalism.”

That’s what makes the Global Religion Journalism Initiative groundbreaking, Wilson adds. “At the end of the day, the public is now getting access to really well-written and fact-based information,” he says. “By funding really good journalism, Lilly Endowment is helping to democratize knowledge. The initiative is showing what’s possible.”

■ A Buddhist family (opposite) approaches a temple on the outskirts of Kandy, Sri Lanka, where religious tensions have emerged amid political change. ■ Students gather early to attend former U.S. President Jimmy Carter’s Sunday school class at Maranatha Baptist Church in Plains, Ga. (below).



Called to Lives of Meaning and Purpose

"This is an opportunity to discern what God will have you do next."

As a participant in Samford University's Life is Calling program, St. Simon Peter Episcopal Church welcomed the opportunity to discover how God was calling members to live out their faith individually as Christians and collectively as a Christian community in Pell City, Alabama. Encouraged by Kelly Rhodes Adams, project coordinator for Life is Calling, the church formed an "Imagination Committee" that asked parish members to consider such questions as: How might we discern and experience God's call on our lives? Where is God calling us to serve? To assist St. Simon Peter Church and other participating congregations in the Samford program, Adams and her team of consultants spent the last half of 2019 creating and piloting a curriculum focused on individual calling.

"The goal was to foster and facilitate conversation that would lead individuals to a deeper understanding of calling as multi-faceted and seasonal in a way that encompasses our whole life and whole self," she explains. "Participants were encouraged not only to think about where their 'deep gladness meets the world's deep need' by considering their passions and gifts but also the season of life they're in and how God could be calling them through the various roles of that season." These roles might include those of employee, retiree, parent, grandparent, caregiver, mentor, friend, empty-nester, newlywed or volunteer.

To better understand God's call on their collective faith community, the Imagination Committee at St. Simon Peter Church invited a Samford program consultant to lead a four-week series of classes. Applying the lessons that emerged from the series, members identified several new ministry possibilities. In the end, they embraced the idea of a respite program for caregivers of persons with dementia. "Their community is aging, and they've seen the toll that memory loss can have on families," says Adams.

Leading a team at Samford, Adams is helping parishioners at St. Simon Peter and 15 other congregations in Alabama hear God's call to minister outwardly—as with caregivers. But just as meaningful is the work of helping individuals discover where God is calling them. "God is calling us in many ways. We need to nurture disciplines that will help us listen and discern, and to consider our faith lives within our families and at work and school," Adams says. "To create a culture of calling within the church, we must recognize and affirm individual calling, in its myriad forms, in ourselves and others."



Cascading communities of learning

Samford University is one of 13 faith-based organizations that have received grants to create "innovation hubs" as part of Lilly Endowment's \$20 million Called to Lives of Meaning and Purpose Initiative. Begun in 2017 and continuing for five years, each hub is working under the guidance of an experienced leader, such as Adams, to accomplish the initiative's central goals:

- to nurture the religious lives of Christians by helping them discover and fully experience God's call; and
- to enhance the vitality of congregations by developing or expanding ministries that enable Christians to live out their callings in community.

Unique to the initiative is its multi-tiered organizational structure. The Collegeville Institute for Ecumenical and Cultural Research at Collegeville, Minn., serves as coordinator of the program's many moving parts and provides learning opportunities—including an annual conference—for hub leaders. These leaders, in turn, create learning opportunities for up to 24 congregational teams that make up the individual hubs. Retreats, webinars, Zoom sessions and dedicated Facebook pages are among the educational activities and resources available to the churches through the hubs. The coordination program also gathers hub teams for learning opportunities focused on innovation and evaluation. Each participating congregation is

creating a project and can apply for a grant of up to \$30,000 to launch or expand a ministry that supports the initiative's intent.

"This truly is an experiment," says Kathleen Cahalan, director of the coordination program. "Lilly Endowment has a long commitment to exploring vocation and calling in the Christian life, and much of the past work has focused on young adults through college campus programs. Now the Endowment is extending those efforts to larger audiences—people in congregations, their pastors and other leaders—and using these innovation hubs as a strategy for reaching them."

The experiment is not without its challenges, but hub leaders have embraced the concept and anticipate positive results. "We're helping Christians grasp two important themes," explains Nancy Going, program director of the C3 hub (Creating a Culture of Calling) and executive director of Vibrant Faith. "First, we Christians don't have just one calling; God calls us to do multiple things. Second, these callings likely change throughout our lifetimes."

A variety of approaches

An early decision that each hub had to make was determining its criteria for selecting participating congregations. The Endowment didn't prescribe a process, only urged hubs to be innovative in their designs. As a result, the Samford hub chose to limit applicants to Alabama churches but sought diversity in size, member demographics and faith tradition. Virginia Theological Seminary's hub opted to work



within the Episcopal denomination. The hub run by the American Baptist College reached out to African American congregations and aimed its first year of programming specifically to pastors rather than laity. Vibrant Faith recruited "congregations we thought could handle an initiative like this and weren't so involved in a crisis that they couldn't move forward," says Going.

Among the most ecumenical hubs is the Communities of Calling Initiative based at the Collegeville Institute. Its congregational teams represent churches from multiple denominations located in urban and

■ A mural (opposite) reflecting the work of vocational discernment projects with congregations across the country was a focal point for participants of a 2019 gathering of project leaders in Indianapolis (above, below).





rural settings in 10 states and Canada. The cohort gathered together for the first time in fall 2018 to begin reflecting on their experiences of calling, as individuals and as members of congregational teams.

“We brought the teams together in a retreat setting,” recalls project director Laura Kelly Fanucci. “We wanted to give them time and space to connect with each other and begin to wrestle with questions of calling. It was interesting to have a Free Methodist pastor and an Orthodox priest who rarely end up in the same room, finding common ground around practices related to calling. It’s been beautiful to see their openness to learn about this issue from each other.”

Because of the diverse needs and contexts of hub members leaders have been flexible in tailoring learning experiences appropriate to their congregations. As the initiative has unfolded, plans have been tweaked, pacing has been adjusted and new resources have been explored in response to the groups’ needs. Pastors, in particular, have expressed appreciation for the opportunity to take a break from the busyness of day-to-day ministry, dispense with tight deadlines and consider where their churches are going in the next several years. “This is not a prepackaged program,” says Adams. “Participants have the freedom to pause and ask, ‘In our unique context and in this moment of time, where is God calling us as individuals and as a congregation?’ ”

The power of cross-fertilization

Two years into the initiative, the chemistry within the hubs and among the congregations is palpable. Teams take it upon themselves to visit each other’s worship services, share resources and propose joint gatherings apart from formally scheduled events. When Vibrant Faith hub leaders offered to teach a workshop on coaching strategies, the Collegeville hub agreed to host the sessions, and representatives from 10 of the 13 hubs attended the training. When the hub located at the Samuel DeWitt Proctor Conference slated its annual conference for Birmingham, Ala., the leaders reached out to the nearby hubs at Samford University and American Baptist College and suggested they gather for a pre-conference workshop. “We talked about issues facing

our churches, especially from the standpoint of social and racial justice,” says Adams. “It was transformative for our participants.”

At December’s annual meeting in Indianapolis, hub leaders engaged in “cross-fertilization”—their term for swapping ideas about ways to respond to the challenges they face. Most leaders are at the point in the initiative where they are receiving grant proposals that detail each congregation’s plan to launch or expand a ministry. With the help of the annual meeting’s attendees, facilitator Steven Tomlinson compiled a list of likely obstacles that could impede the success of some proposals. These obstacles included a lack creativity; fatigue among volunteers; fear of failure; conflict within a team; and the tug between innovation and tradition.

A common dilemma that many hub leaders reported was the tendency of congregations to request grant support for ministries that are worthy of implementation but are unrelated to the intent of the initiative.

“Discernment is about listening to the still, small voice that takes Christians to a deeper place,” Tomlinson reminded them. “This initiative gives congregations an opportunity to discern what God will have them do next.”

Fast forward five years

Evaluation is a key component of all Endowment programs, and hub leaders already are gathering information about the lessons learned from the Called to Lives of Meaning and Purpose Initiative. Hub leaders agree that at the end of the initiative’s five-year span, they want the legacy to be more than the establishment or growth of several congregational ministries. They hope conversations about discernment will be ongoing, and the concept of discipleship will have fresh meaning for individual Christians and for entire communities of faith.

“We typically think of churches as places that don’t want to try new things,” says Adams. “But I’ve been surprised at the number of congregations that said, ‘Sign us up!’ when they heard about this initiative. For me, success will be less about the projects that they propose and more about their willingness to experiment and to look for new ways to be a neighbor to their immediate communities. They’re learning a process of discernment that is tailored to their congregations and that will help them in the future to discern where God is calling them to serve.”

■ Phyllis D.K. Hildreth (above), who directs the Called to Lives of Meaning and Purpose Initiative at American Baptist College in Nashville, Tenn., took part in the 2019 gathering in Indianapolis.

Vocation matters

In March 2019, nearly 700 people representing close to 200 U.S. colleges and universities gathered in Louisville for the national conference of NetVUE, the Network for Vocation in Undergraduate Education. NetVUE's director David Cunningham welcomed a capacity crowd with the words of the late American poet Mary Oliver: "Tell me, what is it you plan to do with your one wild and precious life?"

Presidents, provosts, chaplains, professors and student life leaders came together to learn from one another about how to help students navigate the interplay of meaning-of-life questions, career preparation and religious exploration. They came eager to trade ideas and share resources as they continue to help their campuses be places where students cultivate lifelong practices of vocational discernment.

Now in its 10th year, NetVUE grew out of the Endowment's highly collaborative Programs for the Theological Exploration of Vocation (PTEV) initiative introduced in 1999. The purpose of PTEV was to encourage college students on 88 campuses to examine the relationship between their faith traditions and life choices. The objective: nurture a new generation of talented and committed leaders for religious communities and society.

"PTEV had a significant impact on the colleges and universities that participated," says Harold V. Hartley III, senior vice president at the Council of Independent Colleges (CIC), which had many member schools that received Endowment planning, implementation and sustaining grants to fund PTEV programs on their campuses. When this grant support for the PTEV initiative ended, several presidents at participating schools approached CIC to explore ways to continue the work. "They told us they were going to miss the opportunity to learn from each other," says Hartley. "They were willing to pay dues to help sustain the program."

In 2009, NetVUE's first year, 125 colleges and universities became founding members. Since then, membership has grown by about 10 percent annually. At the end of 2019 more than 260 schools were NetVUE members. Membership dues cover operational expenses, and an Endowment grant to CIC supports NetVUE's effort so that member schools can:

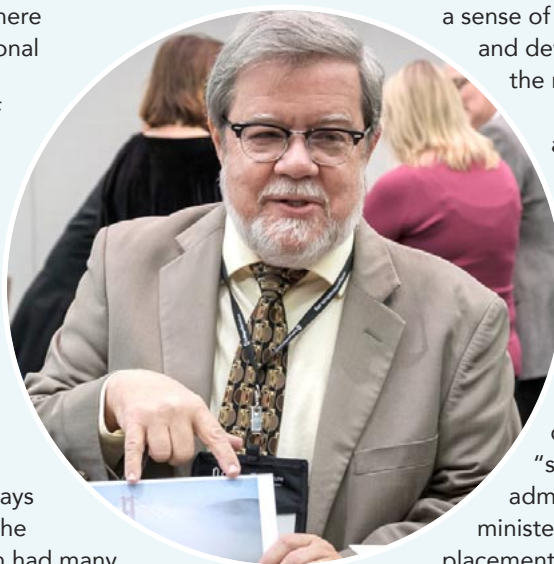
- tap into the resources of an online community
- participate in NetVUE's biennial conference
- take part in annual faculty development seminars
- interact with peers at regional gatherings
- apply for grants to strengthen their vocational exploration programs.

NetVUE schools vary in size and denominational roots. They are in every region across the United States and they run a wide variety of programs. Yet, they share

several challenges, including increased religious diversity on campuses and the need to help students develop marketable job skills while encouraging them to find a sense of direction motivated by faith and develop a commitment to serve the needs of others.

"A lot of folks are talking about developing a mentoring process that is attentive both to meaning-of-life questions and career-preparation questions," says Cunningham. "By their nature, liberal arts campuses attract students who are eager to have those conversations." He cites a "synergy" that exists among administrators, faculty, campus ministers, academic advisors and placement personnel at NetVUE schools. "All things are knitted together to help students think holistically about life's big questions before and beyond graduation."

Cunningham and his staff are leading a 10-year evaluation to learn about NetVUE's long-term impact. "We're looking at what a difference the network is making on campuses," he says. "We hope that vocational discernment will become a habit throughout students' lives. We expect one of the outcomes to be a kind of resilience so when graduates of these programs encounter obstacles or find that a vocational direction isn't working for them, they have the ability to retool and adjust."



■ David Cunningham (above) directs NetVUE.

FINANCES & GRANTMAKING 2019


During 2019 Lilly Endowment paid \$527.7 million in grants and approved \$564.9 million in new grants.


Cumulative figures


The generosity of the Endowment's founders has enabled it to disburse since 1937 more than \$10.9 billion in grants to 10,048 charitable organizations, most of them in Indiana. Of that \$10.9 billion, \$4.1 billion supported education (38 percent), \$3.9 billion supported community development (36 percent), and \$2.9 billion supported religion (26 percent). At the end of 2019 the Endowment's assets totaled nearly \$17 billion.

Grants paid (top chart)

In 2019 the Endowment paid grants of \$527.7 million:

 **Community development** grants accounted for \$187.6 million or 35 percent of the total;


 **Education** grants added up to \$161.8 million or 31 percent;


 **Religion** grants totaled \$178.3 million or 34 percent.


As in previous years, most grants were paid to organizations in Indiana—a total of \$341.4 million (65 percent). Of the payment total of \$527.7 million, \$207.9 million (40 percent) was paid to non-Marion County grantees in Indiana and \$133.5 million (25 percent) to Marion County (Indianapolis) grantees. Organizations outside Indiana received \$186.3 million or 35 percent, mostly from religion grants.

Grants approved (bottom chart)

During 2019 the Endowment approved 867 grants for a total of \$564.9 million to 652 grantees, 124 new to the Endowment:

 **Community development** grants totaled the most dollars at \$221.7 million or 39 percent of the total;

 **Education** grants totaled \$202.3 million or 36 percent;

 **Religion** grants totaled \$140.9 million or 25 percent.

Seventy-four percent of grants approved in 2019 went to Indiana organizations. Of the \$564.9 million in grants approved, \$247.9 million (44 percent) was approved for non-Marion County grantees in Indiana and \$169.5 million (30 percent) to Marion County (Indianapolis) grantees. Indiana organizations thus were awarded \$417.4 million (74 percent) of grants approved. \$147.5 million (26 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 at page 58 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, 2019 and 2018, and the related statements of activities 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. as of December 31, 2019 and 2018, and the changes in its net assets and its cash flows for the years then ended in conformity with U.S. generally accepted accounting principles.

March 19, 2020

Ernst & Young LLP

Statements of Financial Position

As of December 31	2019	2018
Assets		
Cash and cash equivalents	\$ 102,895,606	\$ 55,217,663
Other receivables	4,531,089	4,895,253
Investments—at fair value:		
United States government and agency, bank, and corporate interest-bearing obligations	249,050,902	241,599,420
Eli Lilly and Company common stock (cost – \$81,835,254 at December 31, 2019 and \$82,320,172 at December 31, 2018)	15,056,699,527	13,656,730,979
Diversified equity investments	1,564,553,202	1,125,971,636
Other assets	86,447	8,777,769
	<u>\$ 16,977,816,773</u>	<u>\$ 15,093,192,720</u>
Liabilities		
Amounts appropriated for future grants	\$ 104,554,908	\$ 102,067,651
Federal excise tax payable	1,098,576	-
Deferred tax liability	211,402,789	270,287,504
	<u>317,056,273</u>	<u>372,355,155</u>
Net assets without donor restrictions	16,660,760,500	14,720,837,565
	<u>\$ 16,977,816,773</u>	<u>\$ 15,093,192,720</u>

See accompanying notes.

Statements of Activities

Year Ended December 31	2019	2018
Income:		
Dividends	\$ 336,001,433	\$ 300,912,924
Interest	7,776,108	3,268,693
Total income	343,777,541	304,181,617
Expenses:		
Program grants approved	542,788,367	499,717,526
Program support	9,695,262	9,454,556
Operational support	7,713,393	7,049,275
Federal excise tax related to realized gains	15,198,576	8,130,120
Federal excise tax related to unrealized gains	(58,884,715)	62,636,451
Total expenses	516,510,883	586,987,928
Realized gain on sale of investments	428,463,140	525,419,340
Unrealized gain on investments	1,683,867,433	3,117,160,794
Other income (expense)	325,704	(6,765,934)
Increase in net assets	1,939,922,935	3,353,007,889
Net assets without donor restrictions:		
Balance at beginning of year	14,720,837,565	11,367,829,676
Increase in net assets	1,939,922,935	3,353,007,889
Balance at end of year	<u>\$ 16,660,760,500</u>	<u>\$ 14,720,837,565</u>

See accompanying notes.

Statements of Cash Flows

Year Ended December 31	2019	2018
Operating activities		
Increase in net assets	\$ 1,939,922,935	\$ 3,353,007,889
Adjustments to reconcile change in net assets to net cash used in operating activities:		
Investment expenses	895,548	312,425
Unrealized gain on investments	(1,683,867,433)	(3,117,160,794)
Realized gain on sale of investments	(428,463,140)	(525,419,340)
Changes in assets and liabilities:		
Other receivables	364,164	7,741,741
Other assets	8,691,322	(6,273,095)
Amounts appropriated for future grants	2,487,257	(1,026,972)
Federal excise tax payable	1,098,576	-
Deferred tax liability	(58,884,715)	62,636,451
Net cash used in operating activities	(217,755,486)	(226,181,695)
Investing activities		
Purchases of investments	(495,438,979)	(483,963,238)
Proceeds from sale and maturity of investments	761,767,956	715,638,701
Investment expenses	(895,548)	(312,425)
Net cash provided by investing activities	265,433,429	231,363,038
Net increase in cash and cash equivalents	47,677,943	5,181,343
Cash and cash equivalents at beginning of year	55,217,663	50,036,320
Cash and cash equivalents at end of year	\$ 102,895,606	\$ 55,217,663

See accompanying notes.

Notes to Financial Statements

December 31, 2019

1. Significant Accounting Policies

Description of Organization

Lilly Endowment Inc. (the Endowment) is an Indianapolis based, private philanthropic foundation created in 1937 by J.K. Lilly Sr. and sons Eli and J.K. Jr. 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 March 19, 2020, the date these financial statements were issued. There were no subsequent events that required recognition or disclosure in the financial statements.

Cash and Cash 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 statements of activities. 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 incurred. The amounts expensed during 2019 and 2018 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. Grants are approved by the Board of Directors or its authorized representatives and are accrued when approved. Amounts appropriated for future grants at December 31, 2019, are expected to be paid to grantees as follows: \$82,504,908 in 2020, \$17,050,000 in 2021 and \$5,000,000 in 2022.

Functional Allocation of Expenses

The Endowment allocates expenses based on nature and function among its various programs and supporting services.

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.

2. 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 \$670,000,000, before January 1, 2021, to meet the 2019 minimum distribution requirements.

3. Other Receivables

Other receivables represent the fair value of future cash flows to be received from the Endowment's split-interest agreement held by third parties. Amounts recorded are subject to subsequent changes in fair value, which are recorded in the statements of activities as other income (expense). These changes totaled income of \$325,704 during 2019 and expense of \$6,940,362 during 2018.

4. 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, 2019 and 2018.

Description	Cost	Quoted Prices in Active Markets for Identical Assets (Level 1)	Observable Inputs (Level 2)	Unobservable Inputs (Level 3)	Fair Value (Carrying Value)
December 31, 2019					
Cash equivalents	\$ 87,941,516	\$ 88,024,720	\$ —	\$ —	\$ 88,024,720
Fixed income securities	248,080,064	—	249,050,902	—	249,050,902
Marketable securities	1,121,337,077	16,621,252,729	—	—	16,621,252,729
	1,457,358,657	16,709,277,449	249,050,902	—	16,958,328,351
Other receivables	—	—	—	4,531,089	4,531,089
	<u>\$ 1,457,358,657</u>	<u>\$ 16,709,277,449</u>	<u>\$ 249,050,902</u>	<u>\$ 4,531,089</u>	<u>\$ 16,962,859,440</u>
December 31, 2018					
Cash equivalents	\$ 51,904,169	\$ 51,942,960	\$ —	\$ —	\$ 51,942,960
Fixed income securities	240,676,674	—	241,599,420	—	241,599,420
Marketable securities	966,606,304	14,782,702,615	—	—	14,782,702,615
	1,259,187,147	14,834,645,575	241,599,420	—	15,076,244,995
Other receivables	—	—	—	4,895,253	4,895,253
	<u>\$ 1,259,187,147</u>	<u>\$ 14,834,645,575</u>	<u>\$ 241,599,420</u>	<u>\$ 4,895,253</u>	<u>\$ 15,081,140,248</u>

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, 2019 and 2018.

The fair value for marketable securities is determined based on the regular trading session closing price on the exchange or market in which such securities are principally traded on the last business day of each period presented (Level 1).

Fixed income securities are not based on quoted prices in active markets (Level 2). The fair value is determined by pricing models, quoted prices of securities with similar characteristics, or discounted cash flows. Fair values for these fixed income securities are obtained primarily from third-party pricing services.

Other receivables, which is a split-interest agreement, are valued using significant unobservable inputs (Level 3). The need to use unobservable inputs generally results from the lack of an active market or marketplace with respect to the split-interest agreement. The split-interest agreement is recorded at the estimated fair value based on the present value of the Endowment's future cash flows from the related trust. Future cash flows are based on an income approach (present value techniques), the inputs of which include the fair value of the underlying trust assets, the Endowment's interest percentage in the split-interest agreement, annuity percentage per the split-interest agreement, estimated rate of return and discount rate.

5. Liquidity and Availability

None of the financial assets as listed on the statements of financial position, with the exception of other receivables, is subject to donor restrictions, board designations, or other contractual restrictions that make them unavailable for general expenditure within one year of the statement of financial position date. As part of the Endowment's liquidity management, the Endowment has policies to structure its financial assets to be available for its general expenditures (grant making activities and other expenses). The Endowment uses dividends, interest and sales of investments to cover these expenditures.

6. Federal Excise Taxes

During 2019 and 2018, the Endowment was 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's excise tax rate was 2% for the year ended December 31, 2019 and 1% for the year ended December 31, 2018. Federal excise tax expense on realized amounts was \$15,198,576 and \$8,130,120 for the years ended December 31, 2019 and 2018, respectively. The Endowment made estimated excise tax payments totaling \$14,100,000 and \$16,750,000 during 2019 and 2018, respectively. Due to estimated tax underpayments during 2019, the Endowment recorded a federal excise tax payable of \$1,098,576 at December 31, 2019 in the statements of financial position. Due to estimated tax overpayments during 2018, the Endowment recorded a receivable of \$8,619,880 at December 31, 2018 within other assets in the statements of financial position.

On December 20, 2019, the Taxpayer Certainty and Disaster Relief Act of 2019 (the Act) was signed into law. Among other things, the Act simplified the federal excise tax rate imposed on private foundations to a flat 1.39% rate, which is effective for tax years beginning after December 20, 2019. The Endowment used the 1.39% rate to calculate the deferred tax liability recorded on the statements of financial position for the year ended December 31, 2019, compared to the 2% rate used to calculate the deferred tax liability under federal tax law for the year ended December 31, 2018. The deferred tax liability relates to deferred federal excise taxes on unrealized gains of investments. The Endowment recorded a decrease in the deferred tax liability of \$58,884,715 for the year ended December 31, 2019 and an increase of \$62,636,451 for the year ended December 31, 2018. These changes were driven by the enactment of the Act in 2019 (establishing a fixed tax rate for future years) as well as changes in the amounts of unrealized gains on investments recorded in the statements of activities during 2019 and 2018.

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 2016 due to three-year statute of limitations.

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

GRANT APPROVALS 2019





Grant Approvals

Dollar amount approved in 2019

American Cabaret Theatre

Indianapolis, IN

General operating support	100,000
Support for creative placemaking efforts	100,000

American Enterprise Institute for Public Policy Research

Washington, DC

General operating support	100,000
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American Red Cross

Washington, DC

Disaster relief (2)	1,500,000
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American Pianists Association

Indianapolis, IN

2020/21 Classical Fellowships and 2022/23 Jazz Fellowships	275,000
Support for leadership transition	75,000

Arts Council of Indianapolis

Indianapolis, IN

Art & Soul at the Artsgarden	52,000
General operating support	300,000
Support to establish the Civic Leadership Alliance	100,000

Arts for Lawrence

Lawrence, IN

Strategic planning	15,000
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Atlas Economic Research Foundation (Atlas Network)

Arlington, VA

General operating support	500,000
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Career Learning and Employment Center for Veterans

Indianapolis, IN

Continued support for Operation: Job Ready Veterans	450,000
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Center for the Study of Liberty

Carmel, IN

Capacity building	50,000
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Central Indiana Corporate Partnership (CICP) Foundation

Indianapolis, IN

AgriNovus	3,691,903
BioCrossroads	2,900,000
Energy Systems Network: Moving Forward	531,639
Support for Indiana Bellwether Study research and engagement programs	1,960,000
Energy Systems Network: Indy Autonomous Challenge	4,000,000

The Children's Museum of Indianapolis

Indianapolis, IN

Support for the Access Pass program	100,000
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Classical Music Indy

Indianapolis, IN

Support to catalogue and digitize the Peck Classical Music Library Collection	15,000
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Coalition for Homelessness Intervention and Prevention

Indianapolis, IN

General operating support	260,000
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Crossroads Rehabilitation Center (Easterseals Crossroads)

Indianapolis, IN

Speech and Hearing Resource Center	838,510
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Dance Kaleidoscope

Indianapolis, IN

General operating support	100,000
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Domestic Violence Network of Greater Indianapolis

Indianapolis, IN

General operating support	225,000
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The Doughboy Foundation (United States Foundation for the Commemoration of the World Wars)

Washington, DC

Support for the National World War I Memorial	5,000,000
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Dove Recovery House for Women

Indianapolis, IN

Capacity building	50,000
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The Economic Club of Indiana

Indianapolis, IN

General operating support	10,000
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Edna Martin Christian Center

Indianapolis, IN

Leadership transition support	50,000
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Eiteljorg Museum of American Indians and Western Art

Indianapolis, IN

General operating support	1,147,500
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The Federalist Society for Law and Public Policy Studies

Washington, DC

General operating support	150,000
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Fraser Institute

Vancouver, BC

General operating support	300,000
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Freedom House

Washington, DC

General operating support	100,000
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Website and technology infrastructure	200,000
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George Mason University Foundation

Fairfax, VA

Operating support for Law and Economics Center judicial education programs	100,000
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Greater Indianapolis Chamber of Commerce Foundation

Indianapolis, IN

Annual conference of the International Economic Development Council	50,000
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Support for a comprehensive study of I-65/I-70 reconstruction alternatives	475,000
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Grouseland Foundation

Vincennes, IN

Capital campaign	400,000
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Heartland Film

Indianapolis, IN

General operating support	300,000
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Indiana Association for Community Economic Development (Prosperity Indiana)

Indianapolis, IN

General operating support	175,000
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Indiana Association of School Principals

Indianapolis, IN

INSPIRE3 program 250,000

Indiana Association of United Ways

Indianapolis, IN

Special projects and general operating support 7,432,577

Indiana Coalition to End Sexual Assault

Indianapolis, IN

Capacity building plan implementation 50,000

Indiana Philanthropy Alliance Foundation

Indianapolis, IN

GIFT technical assistance for 2020 780,000

Indiana Repertory Theatre

Indianapolis, IN

General operating support 300,000

Support to develop a play to commemorate Indianapolis' bicentennial 95,753

Indiana Sports Corporation

Indianapolis, IN

Capital improvements to Eagle Creek rowing course 150,000

General operating support 500,000

Indiana Chamber Foundation

Indianapolis, IN

Feasibility study and planning for talent resource clearinghouse 50,000

Indiana State Fair Foundation

Indianapolis, IN

Feasibility study for State Fair Farm 120,000

Indiana Symphony Society (Indianapolis Symphony Orchestra)

Indianapolis, IN

General operating support 1,237,000

Hilbert Circle Theatre feasibility study, strategic planning and brand research 100,000

Indiana University Foundation

Bloomington, IN

Support for Social Assets and Vulnerabilities Indicators (SAVI) community information system 300,000

Indiana White River State Park Development Commission

Indianapolis, IN

Amphitheater at White River State Park 9,000,000

Indianapolis Art Center

Indianapolis, IN

General operating support and planning 257,500

Indianapolis Chamber Orchestra

Indianapolis, IN

Vision 21 capital campaign 300,000

Indiana Historical Society

Indianapolis, IN

Assessment and planning 50,000

History collecting initiative for Indianapolis' bicentennial 100,000

Indiana Heritage Support Grants Program and multicultural collections sharing projects 3,619,000

Indiana Humanities

Indianapolis, IN

General operating support 100,000

Indianapolis literary trail 100,000

Indiana National Guard Relief Fund

Indianapolis, IN

Continuing support for the Indiana National Guard Relief Fund 445,220

Indiana Philanthropy Alliance

Indianapolis, IN

General operating support 298,750



Indianapolis Children's Choir

Indianapolis, IN

General operating support	150,000
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Indianapolis Cultural Trail

Indianapolis, IN

Support for expansion of the Cultural Trail	20,000,000
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Indianapolis Jazz Foundation

Indianapolis, IN

Indy Jazz Festival	42,000
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Indianapolis Museum of Art (Newfields)

Indianapolis, IN

General operating support	500,000
Support for Luminarium immersive digital art exhibitions	6,995,500

Indianapolis Neighborhood Housing Partnership

Indianapolis, IN

General operating support	5,300,000
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Indianapolis Neighborhood Resource Center

Indianapolis, IN

Capacity building and neighborhood development services	250,000
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Indianapolis Oasis

Indianapolis, IN

Capacity building and transitional support	50,000
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Indianapolis Opera

Indianapolis, IN

General operating support	80,000
Outreach and community programming for "Brundibar & Vedem" production	15,000

Indianapolis Shakespeare Company

Indianapolis, IN

Production of "Hamlet"	25,000
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Indianapolis Urban League

Indianapolis, IN

Support for national conference welcoming event in Indianapolis	150,000
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Indianapolis Zoological Society (Indianapolis Zoo)

Indianapolis, IN

General operating support	1,116,720
Support for the creation of the Species Survival Team in Indianapolis	4,000,000
Support for the Indianapolis Prize and capital enhancements	10,000,000

Indianapolis Public Library Foundation

Indianapolis, IN

Digital encyclopedia of Indianapolis	1,200,000
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IndyHub Foundation

Indianapolis, IN

Strategic planning activities	22,450
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Intercollegiate Studies Institute

Wilmington, DE

General operating support	125,000
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The International Center

Indianapolis, IN

General operating support	500,000
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International Violin Competition of Indianapolis

Indianapolis, IN

Eleventh Quadrennial International Violin Competition	900,000
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Keep Indianapolis Beautiful

Indianapolis, IN

General operating support	325,000
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Kennedy King Memorial Initiative

Indianapolis, IN

Feasibility study	49,500
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Kids Dance Outreach

Indianapolis, IN

Support for Kids Dance Outreach Event of the Year	10,000
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Kurt Vonnegut Museum and Library

Indianapolis, IN

Capital campaign	500,000
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Local Initiatives Support Corporation

New York, NY

Indianapolis LISC program	500,000
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Manhattan Institute for Policy Research

New York, NY

General operating support	200,000
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Mapleton Fall Creek Housing Development Corporation

Indianapolis, IN

Acquisition for neighborhood revitalization	394,980
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Mentoring Womens Network Foundation (Pass the Torch for Women Foundation)

Indianapolis, IN

Capacity building for statewide expansion of Project Grow	45,000
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National Urban League

New York, NY

Support for national conference in Indianapolis	350,000
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The New Harmony Project

Indianapolis, IN

General operating support	50,000
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Pacific Research Institute for Public Policy

San Francisco, CA

General operating support	175,000
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PATTERN

Carmel, IN

Capacity building	50,000
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Percussive Arts Society

Indianapolis, IN

Support for technology enhancements	49,500
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Political Economy Research Center (Property and Environment Research Center)

Bozeman, MT

General operating support	50,000
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Propylaeum Historic Foundation

Indianapolis, IN

Capacity building	50,000
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Sagamore Institute for Policy Research

Indianapolis, IN

General operating support	300,000
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Measuring Indiana's Well-Being	45,000
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The Salvation Army National Corporation

Alexandria, VA

Disaster relief	1,000,000
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Society of St. Vincent de Paul

Indianapolis, IN

Capital support	200,000
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Stanford University – Hoover Institution

Stanford, CA

General operating support	125,000
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Steward Speakers

Indianapolis, IN

Support for lecture series	45,000
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Tax Foundation

Washington, DC

General operating support	110,000
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16 Tech Community Corporation

Indianapolis, IN

Planning grant to evaluate the creation and design of a makerspace	50,000
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Tourism Tomorrow

Indianapolis, IN

Support for an art beach along the White River	100,000
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United Way of Central Indiana

Indianapolis, IN

Capital Projects Fund	7,500,000
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Continuation of the Human Service Professional Renewal program	592,800
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Facilities Maintenance Fund	700,000
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Homelessness Targeted Initiatives Fund	286,896
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Support for 2019 annual fundraising	4,300,000
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United Way Worldwide

Alexandria, VA

Support to implement best practices in United Way network	8,000,000
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University of Notre Dame du Lac

Notre Dame, IN

Create and Launch the Labs for Industry Futures and Transformation (LIFT) Network for the South Bend-Elkhart region (a \$42,431,066 grant shared with the Education Division)	21,215,533
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University of Southern Indiana

Evansville, IN

General operating support for the Historic New Harmony project	125,000
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USA International Harp Competition

Bloomington, IN

2019 International Harp Competition	20,000
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Welcome Home Vietnam Veterans

Indianapolis, IN

Support for Indiana Gold Star Families Memorial Monument	20,000
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Wheeler Mission Ministries

Indianapolis, IN

Capital campaign for a center for women and children	4,000,000
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Young Audiences of Indiana (Arts for Learning)

Indianapolis, IN

General operating support	200,000
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Holiday Assistance Fund

(21 grants ranging from \$3,800 to \$271,822)	500,000
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Catholic Charities Indianapolis

Christ Emmanuel Missionary Baptist Church

Community Action of Greater Indianapolis

Flanner House

Gleaners Food Bank of Indiana

Hall Temple Church of God in Christ

Healing Place

HOPE Project

Indiana F.O.P. Foundation

Indianapolis Housing Agency

Indianapolis Urban League

Kingsley Terrace Church of Christ

La Plaza

Latino Community Development Corporation

Lutheran Child & Family Services of Indiana

Metro Baptist Center

Mozel Sanders Foundation

New Covenant Church

Rev. Richard Hunter Ministries

The Salvation Army, Indiana Division

Westminster Neighborhood Services

Indiana Community Foundation Initiative – GIFT Phase VII

Offering matching fund grants to help Indiana community foundations and affiliate funds build unrestricted endowments and raise funds for charitable purposes, and planning grants to help community foundations and affiliate funds provide leadership for local efforts to address high-priority challenges and opportunities in their communities.

(6 matching fund grants ranging from \$319,222 to \$2,000,000; 75 leadership planning grants ranging from \$50,000 to \$200,000)	10,439,320
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Adams County Community Foundation

Blackford County Community Foundation

Blue River Foundation (Shelby County)

Brown County Community Foundation

Cass County Community Foundation



Community Foundation Alliance affiliate funds:

- Daviess County Community Foundation
- Gibson County Community Foundation
- Knox County Community Foundation
- Perry County Community Foundation
- Pike County Community Foundation
- Posey County Community Foundation
- Spencer County Community Foundation
- Vanderburgh County Community Foundation
- Warrick County Community Foundation

Community Foundation of Bloomington and Monroe County

- Community Foundation of Boone County
- Community Foundation of Crawford County
- Community Foundation of Elkhart County
- Community Foundation of Grant County
- Community Foundation of Howard County

Community Foundation of Howard affiliate funds:

- Carroll County Community Foundation
- Clinton County Community Foundation

Community Foundation of Greater Fort Wayne (2)

- Community Foundation of Jackson County

- Community Foundation of Madison and Jefferson County

- Community Foundation of Morgan County (2)

- Community Foundation of Muncie and Delaware County

- Community Foundation of Pulaski County

- Community Foundation of Randolph County

- Community Foundation of Southern Indiana:

- Clark County Community Foundation

- Floyd County Community Foundation

- Community Foundation of St. Joseph County

- Community Foundation of Switzerland County

- Community Foundation of Wabash County

- Community Foundation Partnership:

- Lawrence County Community Foundation

- Martin County Community Foundation

- Dearborn Community Foundation

- Decatur County Community Foundation

- DeKalb County Community Foundation

- Dubois County Community Foundation

- Fayette County Community Foundation

- Franklin County Community Foundation

- Greater Lafayette Community Foundation

- (Tippecanoe County)

- Greater Lafayette Community Foundation affiliate fund:

- White County Community Foundation

- Greene County Foundation

- Hancock County Community Foundation

- Harrison County Community Foundation

- Hendricks County Community Foundation

- Henry County Community Foundation

- Heritage Fund of Bartholomew County

- Huntington County Community Foundation

- Indianapolis Foundation

- Jasper Newton Foundation (Jasper County)

- Jasper Newton Foundation affiliate fund:

- Newton County Community Foundation

- Jennings County Community Foundation

- Johnson County Community Foundation

- Kosciusko County Community Foundation

- LaGrange County Community Foundation (2)

- Legacy Foundation (Lake County)

- Legacy Fund (Hamilton County)

- Madison County Community Foundation (2)

- Marshall County Community Foundation

- Montgomery County Community Foundation

- Noble County Community Foundation

Northern Indiana Community Foundation
affiliate funds:

Fulton County Community Foundation
Miami County Community Foundation
Starke County Community Foundation

Ohio County Community Foundation
Orange County Community Foundation
Owen County Community Foundation
Parke County Community Foundation
Porter County Community Foundation
The Portland Foundation (Jay County)
Putnam County Community Foundation
Ripley County Community Foundation
Rush County Community Foundation
Scott County Community Foundation
South Madison Community Foundation
Steuben County Community Foundation
Tipton County Foundation
Union County Foundation
Unity Foundation of La Porte County
Wabash Valley Community Foundation
(Vigo County)
Wabash Valley Community Foundation
affiliate funds:

Clay County Community Foundation
Sullivan County Community Foundation

Warren County Community Foundation
Washington County Community Foundation
Wayne County, Indiana Foundation
Wells County Foundation (2)
Western Indiana Community Foundation
(Fountain County)
Western Indiana Community Foundation
affiliate fund:
Vermillion County Community Foundation
Whitley County Community Foundation

Social Services Sustainability Initiative

Grants to help organizations serving children and youth in
Indianapolis bolster their long-term sustainability plans.
(13 grants ranging from \$1 million to \$7.5 million) 54,700,000

Big Brothers Big Sisters of Central Indiana,
Indianapolis, IN
100 Black Men of Indianapolis, Indianapolis, IN
Boy Scouts of America, Indianapolis, IN
Boys & Girls Clubs of Indianapolis, Indianapolis, IN
Child Advocates, Indianapolis, IN
College Mentors for Kids, Indianapolis, IN

Community Alliance of the Far Eastside (CAFE),
Indianapolis, IN
Girl Scouts of Central Indiana, Indianapolis, IN
Girls Inc. of Greater Indianapolis, Indianapolis, IN
Happy Hollow Children's Camp, Indianapolis, IN
Jameson Camp, Indianapolis, IN
Junior Achievement of Central Indiana,
Indianapolis, IN
Kids' Voice of Indiana, Indianapolis, IN

PHILANTHROPY

Candid

New York, NY

General operating support	125,000
2019 membership support	30,000

Council on Foundations

Washington, DC

2019 membership support	23,500
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Independent Sector

Washington, DC

2019 membership support	17,500
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National Center for Family Philanthropy

Washington, DC

Support for family foundation leadership initiatives and CEO transition	150,000
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Philanthropy Roundtable

Washington, DC

General operating support	100,000
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Subtotal

Community Development and Philanthropy Grants	221,623,551
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Subtotal

Community Development and Philanthropy Discretionary Grants	99,500
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Total

Community Development and Philanthropy Grants	221,723,051
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Grant Approvals

Education and Youth



Dollar amount approved in 2019

American Indian College Fund

Denver, CO

Employable Graduate Pathways Program	1,500,000
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Central Indiana Corporate Partnership (CICP) Foundation

Indianapolis, IN

Conexus Indiana; Leveraging the Legacy, Powering a Dynamic Future	3,000,000
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Funding for the charitable and educational purposes of Ascend Indiana	12,750,000
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College Mentors for Kids

Indianapolis, IN

Capacity building and sustainability	50,000
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Early Learning Indiana

Indianapolis, IN

Improving accessibility to high-quality early learning programs in Indiana	15,000,000
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Independent Colleges of Indiana

Indianapolis, IN

Administration of the Lilly Endowment Community Scholarship Program 2019/20	1,523,822
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Administration of the Lilly Endowment Community Scholarship Program 2020/21	1,631,120
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Lilly Endowment Community Scholarship Program for 2020	13,450,000
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Lilly Endowment Community Scholarship Program for 2021	18,647,408
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Lilly Scholars Network	1,055,500
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Realizing the Dream: A project to recognize achievement by first-generation college students	430,995
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Indiana Campus Compact

Indianapolis, IN

Continued support for student community engagement	900,000
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Indiana State University

Terre Haute, IN

Extending Teacher Creativity 2020: A Summer Workshop for Teacher Creativity Fellows	108,549
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Indiana Student Financial Aid Association

Carmel, IN

College Goal Sunday 2020 events	50,000
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Indiana University Foundation

Bloomington, IN

Commission of murals for Lilly Library reading room	500,000
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Renovation of Lilly Library	10,886,425
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Indiana Youth Institute

Indianapolis, IN

Continuation of College and Career Counseling Initiative	1,575,000
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Indianapolis Black Alumni Council

Indianapolis, IN

2019 College Fair events	15,000
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Indy Reads

Indianapolis, IN

Stability and Sustainability Project	250,000
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Ivy Tech Foundation

Indianapolis, IN

Career coaching and employer connections program	8,000,000
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The Mind Trust

Indianapolis, IN

Continued support for Innovation Network Schools program	3,750,000
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Private Academic Library Network of Indiana

Indianapolis, IN

Increasing student access to affordable electronic textbooks	520,000
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Purdue Research Foundation

West Lafayette, IN

Continuing support for the Military Family Research Institute	4,500,000
The Gateway Complex Initiative	40,000,000

School on Wheels

Indianapolis, IN

Partial support for increased staff positions	39,800
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Starfish Initiative

Indianapolis, IN

Capacity building	125,000
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Teachers' Treasures

Indianapolis, IN

Mobile Outreach Program	150,000
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United Negro College Fund (UNCF)

Washington, DC

Support for the UNCF Indiana Campaign	85,000
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University of Notre Dame du Lac

Notre Dame, IN

Create and Launch the Labs for Industry Futures and Transformation (LIFT) Network for the South Bend-Elkhart region (a \$42,431,066 grant shared with the Community Development Division)	21,215,533
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The Woodrow Wilson National Fellowship Foundation

Princeton, NJ

Initial phase of American History Initiative	50,000
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Character Development Initiative

(2 planning grants)

Indiana University Foundation, Bloomington, IN	348,980
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Purdue Research Foundation, West Lafayette, IN	491,043
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Charting the Future for Indiana Colleges and Universities

Initiative to help Indiana's 38 colleges and universities further develop strategies to strengthen their effectiveness and long-term sustainability. Grant amounts are based on the student population of the colleges and universities.

(38 planning grants ranging from \$95,000 to \$200,000)	6,195,000
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Ancilla College, Donaldson, IN

Anderson University, Anderson, IN

Ball State University Foundation, Muncie, IN

Bethel University, Mishawaka, IN

Butler University, Indianapolis, IN

Calumet College of St. Joseph, Whiting, IN

DePauw University, Greencastle, IN

Earlham College, Richmond, IN

Franklin College of Indiana, Franklin, IN

Goshen College, Goshen, IN

Grace College, Winona Lake, IN

Hanover College, Hanover, IN

Holy Cross College, Notre Dame, IN
Huntington University, Huntington, IN
Indiana Institute of Technology, Fort Wayne, IN
Indiana State University Foundation, Terre Haute, IN
Indiana University Foundation, Bloomington, IN
Indiana Wesleyan University, Marion, IN
Ivy Tech (Community College) Foundation, Indianapolis, IN
Manchester University, North Manchester, IN
Marian University, Indianapolis, IN
Martin University, Indianapolis, IN
Oakland City University, Oakland City, IN
Purdue Research Foundation, West Lafayette, IN
Rose-Hulman Institute of Technology, Terre Haute, IN
St. Mary-of-the-Woods College, St. Mary-of-the-Woods, IN
St. Mary's College, Notre Dame, IN
Taylor University, Upland, IN
Trine University, Angola, IN
University of Evansville, Evansville, IN
University of Indianapolis, Indianapolis, IN
University of Notre Dame du Lac, Notre Dame, IN
University of Saint Francis, Fort Wayne, IN
University of Southern Indiana Foundation, Evansville, IN
Valparaiso University, Valparaiso, IN
Vincennes University Foundation, Vincennes, IN
Wabash College, Crawfordsville, IN
Western Governors University, Salt Lake City, UT

Teacher Creativity Fellowship Program

A competitive program for renewal of Indiana K-12 teachers, principals and assistant principals, school counselors and media specialists.

(100 grants of \$12,000 each) 1,200,000

YOUTH

American Camping Association

Martinsville, IN

Developing supportive systems for improving quality at summer camps 991,800

Big Brothers Big Sisters of Central Indiana

Indianapolis, IN

Mentor recruitment and match support 366,534

100 Black Men of Indianapolis

Indianapolis, IN

Operating support and capacity building 163,000

Boys & Girls Clubs of America

Atlanta, GA

Assessment and plan to strengthen Indiana clubs 350,000

Center for Leadership Development

Indianapolis, IN

Operating support 1,000,000

Program expansion under capital campaign 11,615,970

Claude McNeal's Musical Theatre Training Program

Indianapolis, IN

Support for ACT Out program 250,000

Fathers and Families Resource Research Center

Indianapolis, IN

Operating support 1,600,000

Girls Inc.

New York, NY

Growing Girls Inc. affiliates in Indiana 1,375,000

Girls Inc. of Greater Indianapolis

Indianapolis, IN

Curriculum development and evaluation 750,000

IARCA Institute for Excellence

Indianapolis, IN

Continued support for outcomes project and capacity building 499,295

Indiana Afterschool Network

Indianapolis, IN

Out-of-school-time programs 540,000

Indiana Black Expo

Indianapolis, IN

Youth and family programs and landscape study 1,017,687

Indianapolis Private Industry Council

Indianapolis, IN

Continuing support and capacity building for the Youth Employment Services (YES) program 3,199,081

Indianapolis Urban League

Indianapolis, IN

Program and capacity building support 735,000



John H. Boner Community Center (John Boner Neighborhood Centers)

Indianapolis, IN

Alliance National Conference	50,000
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Junior Achievement of Central Indiana

Indianapolis, IN

Career exploration programs	1,365,000
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Marion County Commission on Youth

Indianapolis, IN

Capacity building for fund development and youth program leadership	134,000
General operating support	230,000

National FFA Foundation

Indianapolis, IN

National FFA Conferences (2019-2021)	1,500,000
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National Urban Fellows

New York, NY

Support for fellowships in Indianapolis, recruitment and legacy summit	135,000
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Nine 13 (Nine13sports)

Indianapolis, IN

Continued support for Kids Riding Bikes program	300,266
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Peace Learning Center

Indianapolis, IN

Continuing support for Power of One and ACT Out programs	800,000
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Reach for Youth

Indianapolis, IN

Academic readiness and life skills curriculum	50,000
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Stopover

Indianapolis, IN

Bridge funding for transitional living program	50,000
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Summer Youth Program Fund

Grants for organizations to support summer activities for Indianapolis (Marion County) youth

(168 grants to support 208 programs, ranging from \$1,000 to \$255,636)	2,299,999
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Agape Therapeutic Riding Center

American Diabetes Association

American Foundation for Preventive Medicine

Art With a Heart

ArtMix

Arts for Lawrence

Asante Children's Theatre

AYS

Benjamin Harrison Presidential Site

Big Brothers Big Sisters of Central Indiana

Big Car Media (Big Car Collaborative)

100 Black Men of Indianapolis

Boys & Girls Clubs of Indianapolis
 Brave Camps (Brave Initiatives)
 Brightwood Community Center
 Brookes Place for Grieving Young People
 (Brooke's Place)
 Brookside Community Development Corporation
 Burmese American Community Institute
 Butler University
 Camp to Belong Indiana
 Camptown
 Castleton United Methodist Church
 Catholic Charities Indianapolis
 Catholic Youth Organization, Camp Rancho Framasa
 Center for Interfaith Cooperation
 Centro Familiar Vida Nueva
 Children's Bureau
 The Children's Museum of Indianapolis
 Christamore House
 Christel House Academy
 Classical Music Indy
 Claude McNeal's Musical Theatre Training Program
 Coburn Place Safe Haven
 Community Alliance of the Far Eastside (CAFE)
 Community Health Network Foundation
 Community Life Line Christian Church
 Concord Center Association
 (Concord Neighborhood Center)
 D.R.E.A.M. Alive
 Damar Services
 Dance Kaleidoscope
 Dayspring Center
 Diabetic Youth Foundation of Indiana
 (Diabetes Institute)
 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 (2)
 Englewood Christian Church
 Englishton Park Presbyterian Ministries
 Entrepreneurial Ventures in Education
 Family Promise of Greater Indianapolis
 Fay Biccard Glick Neighborhood Center
 at Crooked Creek
 Felege Hiywot Center
 Fight for Life Foundation
 Financial Empowerment Through Education
 First Samuel Missionary Baptist Church

Flanner House
 Footlite Musicals
 Freetown Village
 Freewheelin' Community Bikes
 Girl Scouts of Central Indiana
 Girls Incorporated of Greater Indianapolis
 Girls Rock! Indianapolis
 Gleaners Food Bank of Indiana (2)
 Good News Mission
 Great Commission Church of God
 Greater Gethsemane Missionary Baptist Church
 Groundwork Indy
 Happy Hollow Children's Camp
 Harrison Center for the Arts (Harrison Center)
 Hawthorne Social Service Association
 (Hawthorne Community Center)
 Health and Hospital Corporation
 Health and Science Innovations
 Hear Indiana
 Hemophilia of Indiana
 Hispanic-Latino Minority Health Coalition
 of Greater Indianapolis
 Hoosier Burn Camp
 libada Dancers (libada Dance Company)
 Indiana Amateur Baseball Association
 Indiana Black Expo
 Indiana Deaf Camps Foundation
 Indiana Golf Foundation
 Indiana Latino Institute
 Indiana Performing Arts Centre
 Indiana State Library Foundation



Indiana State Museum Foundation
 Indiana University Foundation
 Indianapolis Art Center
 Indianapolis Ballet
 Indianapolis Children's Choir
 Indianapolis Freedom School Partnership
 Indianapolis Housing Agency
 Indianapolis Neighborhood Resource Center
 Indianapolis Parks Foundation
 Indianapolis Soap Box Derby Association
 The Indianapolis-Marion County
 Public Library Foundation
 The Jackson Center for Conductive Education
 Jameson (Jameson Camp)
 John H. Boner Community Center
 (John Boner Neighborhood Centers)
 Julian Center
 Keep Indianapolis Beautiful
 Kids Dance Outreach
 La Plaza
 Latino Youth Collective of Indiana
 Lawrence Community Gardens
 Lawrence United Methodist Church
 Like A Lion
 Lillian Davis Foundation
 Little Red Door Cancer Agency
 Lutheran Child & Family Services of Indiana
 LYN House
 Marian University
 Marion County Commission on Youth (2)
 Martin Luther King Multi Service Center
 Mary Rigg Neighborhood Center
 Metropolitan School District of Pike Township
 Mission Indy
 Morning Dove Therapeutic Riding
 Muscular Dystrophy Association
 Music for All
 National Association of Black Accountants
 Greater Indianapolis Chapter
 National Junior Tennis League of Indianapolis
 New Beginnings Church
 Nine 13 (Nine13sports)
 Northside New Era Community Outreach
 The Oaks Academy
 Outdoor Youth Exploration Academy Inc.
 Paramount School of Excellence
 Pathway Resource Center
 Peace Learning Center
 Philharmonic Orchestra of Indianapolis
 Pro 100 (TeenWorks)



ProAct Community Partnerships
 Project Transformation Indiana
 Purdue University
 The Recovery High School at Fairbanks
 St. Florian Center
 St. Richard's School
 The Salvation Army
 Sanctuary Outreach
 School on Wheels
 Second Helpings
 Shepherd Community (Shepherd Community Center)
 SHERoes
 Social Health Association of Indiana
 (Life Smart Youth)
 Southeast Community Services
 Speedway Baptist Church
 Starfish Initiative
 The STEM Connection
 Stop the Violence Indianapolis
 Storytelling Arts of Indiana
 Straight Up Ministries (Str8up Ministries)
 Symphonic Youth Orchestra of Greater Indianapolis
 Trinity House Academy
 United North East Community
 Development Corporation
 Wayne Township Education Foundation
 Westminster Neighborhood Services
 Winning Experiences
 Writers Center of Indiana (Indiana Writers Center)
 YMCA of Indianapolis (YMCA of Greater Indianapolis)
 Young Actors Theatre
 Young Audiences of Indiana (Arts for Learning)
 Young Life Indianapolis Urban
 Zion Hill Missionary Baptist Church

Summer Youth Program Fund – Capital

Capital project grants for organizations to improve capacity to conduct summer programs for Indianapolis (Marion County) youth (41 grants ranging from \$5,129 to \$30,000) 800,001

ArtMix

Boys & Girls Clubs of Indianapolis

Brookside Community Development Corporation

Burmese American Community Institute

Catholic Youth Organization, Camp Rancho Framasa

Christel House Academy

Claude McNeal's Musical Theatre Training Program

Coburn Place Safe Haven

Concord Center Association (Concord Neighborhood Center)

Damar Services

DirectEmployers Association Foundation

Englewood Christian Church

Englishton Park Presbyterian Ministries

Felege Hiywot Center

First Samuel Missionary Baptist Church

Flanner House

Great Commission Church of God

Happy Hollow Children's Camp

Harrison Center for the Arts (Harrison Center)

Hawthorne Social Service Association
(Hawthorne Community Center)

Indiana Black Expo

Indiana Golf Foundation

Indiana State Museum Foundation

Indiana University Foundation (2)

Jameson (Jameson Camp)

Julian Center

Keep Indianapolis Beautiful

La Plaza

Lutheran Child & Family Services of Indiana

Nine 13 (Nine13sports)

Northside New Era Community Outreach

Outdoor Youth Exploration Academy Inc.

Paramount Schools of Excellence

Pathway Resource Center

Peace Learning Center

Sanctuary Outreach

Social Health Association of Indiana
(Life Smart Youth)

Starfish Initiative

Westminster Neighborhood Services

Zion Hill Missionary Baptist Church

Subtotal

Education Grants 169,994,175

Subtotal

Youth Grants 32,167,633

Education Discretionary Grants 124,250

Total

Education and Youth Grants 202,286,058



Grant Approvals

Religion



Dollar amount approved in 2019

The Association of Theological Schools

Pittsburgh, PA

Support for second phase of project to help theological schools adapt to their changing contexts

5,985,000

Calvin University

Grand Rapids, MI

Renewing Christian Worship project

8,587,700

Center for Interfaith Cooperation

Indianapolis, IN

Support for capacity building project

236,350

The Christian Century

Chicago, IL

Religion Journalism in a Digital Age project

1,500,000

Christian Theological Seminary

Indianapolis, IN

Continued support for institutional renewal project

800,000

Support for Lilly Endowment Indiana and National Clergy Renewal Programs for 2021

7,500,000

The Conversation US

Boston, MA

Continued support for project to strengthen journalism in religion and philanthropy

1,269,000

Religion journalism partnership program with Association of Theological Schools

645,000

Documentary Educational Resources

Watertown, MA

Support for "Unraveling America" feature documentary project

1,000,000

Duke University

Durham, NC

Continued support for Traditioned Innovation Project

1,375,488

Everything Happens Project

649,021

Emory University

Atlanta, GA

Continued support for project to examine the basic aims and purposes of theological education

1,245,546

Fund for Theological Education (Forum for Theological Exploration)

Decatur, GA

Continued support for strategic initiatives to build networks for cultivating a new generation of Christian leaders

6,500,000

Indiana Landmarks

Indianapolis, IN

Continued support for Sacred Places Indiana program

800,000

Indiana University Foundation

Bloomington, IN

Partial support for Spirit & Place Civic Festival	1,200,000
Support for the Thomas H. Lake Lecture 2020	25,000

Indianapolis Center for Congregations

Indianapolis, IN

Continued support for the Indianapolis Center for Congregations' core programs and services	9,200,000
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Interfaith Youth Core

Chicago, IL

Interfaith Cooperation Through and Beyond Higher Education project	6,000,000
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Missouri State University Foundation

Springfield, MO

Landscape study of chaplaincy and campus ministry in the United States	981,129
Planning for Landscape Study of Campus Ministry in the United States	49,999

National Interfaith Cable Coalition (Odyssey Networks)

New York, NY

Continued support for Odyssey Impact multimedia resource outreach project	1,500,000
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National Trust for Historic Preservation

Washington, DC

Continued support for National Fund for Sacred Places program	11,166,952
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**The On Being Project**

Minneapolis, MN

Support for "On Being" public radio and multimedia project	2,000,000
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Pacific Lutheran University

Tacoma, WA

The Practice of Reflection project	557,173
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Partners for Sacred Places

Philadelphia, PA

Continued support for National Fund for Sacred Places program	3,912,772
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Pension Fund of the Christian Church

Indianapolis, IN

Support for Church Benefits Association strategic planning project	50,000
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Princeton Theological Seminary

Princeton, NJ

Enhancing and Advancing Latinx Scholars/Leaders project	1,439,945
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Project Transformation National

Dallas, TX

Support for capacity-building project	200,000
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Religion Communicators Council

New York, NY

Religion Communication Congress 2020	75,000
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Religion News Foundation

Columbia, MO

Support for Religion News Service project	1,098,000
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University of Chicago

Chicago, IL

Support for Early Career Pastoral Leadership Development	250,000
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University of Virginia

Charlottesville, VA

Continued support for the Project on Lived Theology	1,533,887
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Wake Forest University

Winston-Salem, NC

Program for Leadership and Character at Wake Forest University	3,408,267
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Wesley Theological Seminary

Washington, DC

Research to examine the changing religious workforce in American Christianity

2,058,190

Campus Ministry Theological Exploration of Vocation Initiative

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

(22 sustainability grants ranging from \$21,206 to \$50,000; one \$1.5 million grant to support a coordination program for the initiative)

2,535,867

Archdiocese of St. Louis, St. Louis, MO

Baptist General Association of Virginia, Henrico, VA

Catholic Center at Georgia Institute of Technology, Atlanta, GA

Christian Church Campus Ministry, Normal, IL

College Avenue United Methodist Church, Muncie, IN

Emmaus Campus Ministry, Missoula, MT

Fund for Theological Education, Decatur, GA

Great Plains Annual Conference of the United Methodist Church, Topeka, KS

Hill House Ministries, Austin, TX

House University Ministries of Chattanooga, Chattanooga, TN

Lutheran Campus Ministry at Georgia Tech, Atlanta, GA

Lutheran Campus Ministry at the University of Maryland, College Park, MD

Newman Center - Holy Spirit Parish, Honolulu, HI

Protestant Campus Ministry at Bloomsburg, Bloomsburg, PA

St. Paul's Newman Church of Fargo, Fargo, ND

St. Thomas Aquinas Newman Center, Moorhead, MN

Tyson House Students Foundation, Knoxville, TN

United Campus Ministry in Aggieland, College Station, TX

United Ministry in Higher Education Milwaukee, Milwaukee, WI

Wabash Valley Baptist Association, West Lafayette, IN

Wesley Foundation at Texas Tech, Lubbock, TX

Wesley Foundation at the University of North Carolina, Chapel Hill, NC

Wesley Foundation of the University of North Carolina at Greensboro, Greensboro, NC



National Initiative to Address Economic Challenges Facing Pastoral Leadership

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

(20 grants ranging from \$316,901 to \$1 million and one \$2,458,901 grant to support a coordination program for the initiative)

18,476,027

Archdiocese of Chicago, Chicago, IL

Archdiocese of Louisville, Louisville, KY

Baptist General Convention of Texas, Dallas, TX

Board of Benefits Services of the Reformed Church in America, Grand Rapids, MI

Christian Reformed Church in North America, Grand Rapids, MI

Christianity Today, Carol Stream, IL

Church of God, Cleveland, TN

Church of the Nazarene, Lenexa, KS

Diocese of Lafayette-in-Indiana, Lafayette, IN

Garrett-Evangelical Theological Seminary, Evanston, IL

General Council of the Assemblies of God, Springfield, MO

Greek Orthodox Archdiocese of America, New York, NY

Indianapolis Center for Congregations, Indianapolis, IN

Ministers and Missionaries Benefit Board of the American Baptist Churches, USA, New York, NY



Minnesota Conference United Methodist Church,
Minneapolis, MN
National Association of Evangelicals,
Washington, DC
North Park University, Chicago, IL
Pension Boards-United Church of Christ,
New York, NY
Rocky Mountain Synod Evangelical Lutheran
Church in America, Denver, CO
Villanova University, Villanova, PA

High School Youth Theology Institutes at Colleges and Universities

Support to encourage colleges and universities to cultivate a new generation of leaders for Christian communities through enrichment and discernment programs for high school students

(33 sustainability grants ranging from
\$150,000 to \$300,000)

8,662,964

Asbury College, Wilmore, KY
Augsburg University, Minneapolis, MN
Azusa Pacific University, Azusa, CA
Barclay College, Haviland, KS
Baylor University, Waco, TX
Bethune-Cookman College, Daytona Beach, FL
Boston College, Chestnut Hill, MA
Catholic University of America, Washington, DC
College of St. Scholastica, Duluth, MN
Concordia University, Portland, OR
Emory University, Atlanta, GA
Georgetown College, Georgetown, KY
Gustavus Adolphus College, St. Peter, MN
Hendrix College, Conway, AR
Holy Cross College, Notre Dame, IN

Hope College, Holland, MI
Johnson University, Knoxville, TN
Lipscomb University, Nashville, TN
Lubbock Christian University, Lubbock, TX
Monmouth College, Monmouth, IL
North Carolina Wesleyan College, Rocky Mount, NC
Northwest University, Kirkland, WA
Our Lady of the Lake University, San Antonio, TX
Pfeiffer University, Misenheimer, NC
Rust College, Holly Springs, MS
St. Mary's College, Notre Dame, IN
Southern Wesleyan University, Central, SC
Taylor University, Upland, IN
Tuskegee University, Tuskegee, AL
University of Findlay, Findlay, OH
University of the South, Sewanee, TN
Wayland Baptist University, Plainview, TX
Westmont College, Santa Barbara, CA

Religion and Cultural Institutions Initiative

Planning grants to encourage major museums and cultural institutions in the United States to explore strengthening their capacity to provide fair and accurate portrayals of the role religion has played and continues to play in the United States and across the world

(20 planning grants ranging from
\$70,684 to \$100,000)

1,948,093

Art Institute of Chicago, Chicago, IL
Boston Children's Museum, Boston, MA
Chicago Historical Society, Chicago, IL
The Children's Museum of Indianapolis,
Indianapolis, IN

Colonial Williamsburg Foundation, Williamsburg, VA
 Conner Prairie Museum, Fishers, IN
 Eiteljorg Museum of American Indians and Western Art, Indianapolis, IN
 Field Museum for Natural History, Chicago, IL
 Heard Museum, Phoenix, AZ
 Indianapolis Museum of Art (Newfields), Indianapolis, IN
 Liberty Memorial Association, Kansas City, MO (The National WWI Museum and Memorial)
 Museum of Fine Arts, Boston, MA
 The Museum of Fine Arts, Houston, Houston, TX
 Plimoth Plantation, Plymouth, MA
 Smithsonian Institution, Washington, DC:
 Center for Folklife and Cultural Heritage
 National Museum of African Art
 National Museum of American History
 National Museum of Asian Art (Freer/Sackler galleries)
 University of California, Los Angeles, CA
 University of Notre Dame du Lac, Notre Dame, IN

Thriving Congregations Initiative

Support to help organizations working with congregations to strengthen their ministries and thrive so they can better help people deepen their relationship with God, enhance their connections with each other and contribute to the flourishing of their communities and the world

(25 planning grants ranging from \$41,386 to \$50,000; 22 implementation grants ranging from \$700,972 to \$1 million; one \$625,000 grant to support a coordination program for the initiative)

24,419,715

American Baptist College, Nashville, TN (2)
 Belmont University, Nashville, TN (2)
 Center for Congregational Health, Winston-Salem, NC
 Central Baptist Theological Seminary, Shawnee, KS (2)
 Cincinnati Christian University, Cincinnati, OH
 Cornerstone University, Grand Rapids, MI (2)
 Duke University, Durham, NC
 Episcopal Diocese of Texas, Houston, TX
 George Fox University, Newberg, OR (2)
 Lexington Theological Seminary, Lexington, KY (2)
 Love Out Loud, Winston-Salem, NC (2)
 Luther Seminary, St. Paul, MN (2)
 Matryoshka Haus, Kerrville, TX

National Black Catholic Congress, Baltimore, MD (2)
 Parish Collective, Seattle, WA (2)
 Payne Theological Seminary of Wilberforce, Ohio, Wilberforce, OH (2)
 Princeton Theological Seminary, Princeton, NJ (2)
 ProjectCURATE, Houston, TX
 Reformed Church in America, Grand Rapids, MI (2)
 University of Notre Dame du Lac, Notre Dame, IN (2)
 University of Southern California, Los Angeles, CA (2)
 Vanguard University of Southern California, Costa Mesa, CA (2)
 Vibrant Faith Ministries, Cheshire, CT (2)
 Virginia Union University, Richmond, VA (2)
 Wake Forest University Health Sciences, Winston-Salem, NC (2)
 Wesley Theological Seminary, Washington, DC (2)
 Western Theological Seminary of the Reformed Church in America, Holland, MI (2)

Subtotal

Religion Grants 140,842,085

Subtotal

Religion Discretionary Grants 17,500

Total

Religion Grants 140,859,585

Grand Total – All Divisions

564,868,694

Matching grants – staff, retiree and Board giving 14,223,376

Total – All Grants Approved * 579,092,070

* Reconciliation to Financial Statements

To reconcile the total of all grants approved with the financial statements, the following adjustment for conditional grants, decommitments and refunds must be made:

Adjustment (36,303,703)

Net Total – Grants Approved 542,788,367

Grant Guidelines & Procedures

The following guidelines and procedures, formulated over the years by our founders and Board of Directors, govern our grantmaking decisions.

Areas of Interest

We consider proposals in three main 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 service 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. Nationally, the Endowment provides support on an invitational basis for compelling other causes that are consistent with our areas of interest, such as disaster relief and recovery efforts and programs for veterans' affairs and their families.



Education

Our education grantmaking revolves primarily around objectives to enhance and increase the educational attainment and meaningful economic opportunities of residents in Indiana with the overall aim of improving the quality of life of the state's residents. We support programs in Indiana on an invitational basis that promote high-quality early childhood education, strengthen K-12 education, prepare students for education and careers beyond high school, connect college students and graduates with meaningful employment opportunities in Indiana, enhance the effectiveness of Indiana colleges and universities to prepare their students for successful lives and careers, and build the state's intellectual capital. Nationally, we support on an invitational basis programs that expand and enhance higher education opportunities for African Americans, Native Americans and Latino Americans.



Religion

Our religion grantmaking aims to deepen and enrich the religious lives of American Christians, principally by supporting efforts that enrich the vitality of congregations. We believe that the long-term health of congregations depends on excellent pastoral leadership, and our grants seek to ensure that congregations have a steady stream of wise, faithful and well-prepared leaders. We also support efforts that help Christians draw on the wisdom of their theological traditions as they strive to understand and respond to contemporary challenges and live out their faith more fully. Much of this work centers on the theological concept of vocation and focuses on helping Christians, especially youth and young adults, discover how God calls them to lead lives of meaning and purpose.

In addition, we believe that religion plays a critical role in shaping American life. Through grants to major cultural institutions and 501(c)(3) news and media organizations, we seek to foster public understanding about religion and lift up in fair and accurate ways the contributions that people of all faiths and diverse religious communities have on society and how they contribute to our greater civic well-being.

Youth and Philanthropy

Besides grantmaking in our three principal areas, we award grants in support of youth development and the advancement and study of 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 on an invitational basis 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 especially to grants for community development and elementary/secondary education. Exceptions include occasional funding on an invitational basis for national programs that complement or relate to our work in Indiana or further a compelling cause aligned with our founders' interests.

Our 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 for Latino Americans. Grants to institutions of higher learning outside Indiana are restricted to programs offered by the Endowment on an invitational basis.

Our grantmaking in religion is national in scope, as is support relating to philanthropy and the nonprofit sector, which is provided on an invitational basis. Grants for international purposes are limited to a few United States-based economic 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. Virtually all 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 does not fund endowments or endowed chairs, except in unusual cases involving longstanding grantees or special initiatives.
- Libraries. Except for special initiatives, the Endowment regularly declines grants to public libraries outside Marion County, Ind.

Requests for projects outside of Indianapolis that involve building campaigns, elementary/secondary education, arts and culture, human services, general operations or neighborhood development usually are declined (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 send us by regular mail a preliminary letter of no more than two pages. The letter should tell us about your organization, the project you have in mind, the issue or need you seek to address and the amount of support you would like to request 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.

Approval process

The Endowment can only fund a small percentage of the few thousand grant proposals we receive each year. Our approval process generally begins with a review of a proposal by a program director. Proposals that meet the criteria for consideration proceed to the appropriate division for review, then to the Endowment's 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 generally takes three to six months. All grantseekers receive written notification of our decisions.

Please direct correspondence to:



Lilly Endowment Inc.

A Private Philanthropic Foundation

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Indianapolis, IN 46208-0068

Telephone: 317-924-5471

Website: lillyendowment.org



Working Together to Fill Childcare Needs

Four out of every 10 children in Indiana live in a childcare desert, where there is no more than one childcare seat for every three children.

In 2019, **Early Learning Indiana** created the Child Care Deserts Competition to encourage communities across Indiana to develop innovative solutions to address this challenge. The competition is one of several initiatives developed through a 2014 Lilly Endowment grant to Early Learning Indiana to increase awareness of the importance of high-quality early learning and drive collaboration to improve childcare in Indiana. Through the competition, Early Learning Indiana chose 13 winning projects based in schools, childcare centers and other community organizations.

The grantees received funding of up to \$150,000 to create a total of more than 900 new high-quality childcare seats across the state. “As a result of this competition and the support of Lilly Endowment, many more Hoosier families will be able to experience the two-generational impact of early childhood education,” says Maureen Weber, president and CEO of Early Learning Indiana. “Parents who previously faced difficult decisions due to lack of access to childcare can now remain in or rejoin the workforce while their children benefit from an enriching early learning experience.”

Acknowledgements

Design and Production

David Stahl

Photography

Chris Minnick

Page 4: ITAMCO

Page 5: University of Notre Dame (top)

Page 6: South Bend-Elkhart

Regional Partnership (top, bottom)

Page 8: Indiana Uplands (bottom left)

Page 9: South Bend-Elkhart

Regional Partnership

Pages 20-25, 53: The Associated Press

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