



Lilly Endowment
Annual Report

2022

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About Lilly Endowment

Lilly Endowment Inc. is an Indianapolis-based, private foundation created in 1937 by three members of the Lilly family—J.K. Lilly, Sr. and 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 our founders' hometown, Indianapolis, and home state, Indiana.

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A WIDER PERSPECTIVE

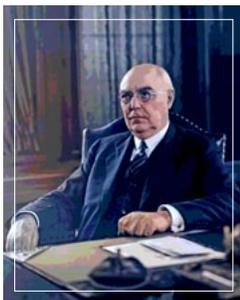
“To discern larger patterns on the dance floor—to see who is dancing with whom, in what groups, in what location and who is sitting out which kind of dance —we have to stop moving and get to the balcony.”

—RONALD A. HEIFETZ, FOUNDER OF THE CENTER FOR PUBLIC LEADERSHIP AT HARVARD UNIVERSITY’S KENNEDY SCHOOL

VIEWS FROM THE BALCONY

Ronald Heifetz in “Leadership Without Easy Answers,” his well-regarded book on leadership, encourages leaders facing complex challenges to “get on the balcony,” a metaphorical place where they can have a better view of what is occurring around them. In other words, the esteemed leadership expert—whose early work on leadership Lilly Endowment was pleased to support—advises leaders to take time to gain a wider perspective on what is happening in their organizations and the contexts in which they conduct their affairs.

FOR MANY YEARS, WE AT THE ENDOWMENT have found that gaining a wider perspective is vital for our work and that of the organizations we support. Heifetz’s image of the “view from the balcony” in fact resonates with the advice of one of the Endowment’s founders, J.K. Lilly Sr., who told his associates in the early part of the 20th century when he was hiking with them through a forest in southern Indiana: “Always cut a place for a lookout... Always have a vista.”



One principal way we assist organizations in widening their perspectives is by providing planning grants to help them identify and study their strengths and challenges, test assumptions, confirm or refine their missions, ensure their endeavors are inclusive by seeking the input of diverse stakeholders, and prioritize and develop strategies to address their challenges and opportunities. Planning grants are used to fund, among other things, convenings, interviews, focus groups, consultants, the collection and analysis of pertinent data and the preparation of proposals for grants to implement strategies developed as a result of planning activities.

This annual report features stories about our grantmaking in community development, education and youth, and religion that highlight how planning grants gave organizations the time and space to stimulate creativity, engage a diverse range of views, imagine collaborative approaches to promote synergies, achieve greater efficiencies and discern how to pursue their missions more effectively.

A story about our work in community development details how a planning grant helped Easterseals Crossroads to research best practices in providing job training and other kinds of support for individuals with disabilities; to bring together staff and board members for brainstorming sessions; and to seek input from employers and other community partners. The planning grant, made through the Endowment’s Enhancing Opportunity in Indianapolis initiative, led to an implementation grant that is funding high-impact, intensive services for individuals with disabilities experiencing financial insecurity that are putting them on a path to well-paying jobs and economic self-sufficiency.

Another story describes the impact of planning grants that Indiana community foundations received through Phase VII of the Endowment’s initiative, Giving Indiana Funds for Tomorrow (GIFT). The Warren County Community Foundation used its planning grant to engage in conversations with a broad range of residents, which led the foundation to prioritize for this grant opportunity improving recreation areas, particularly in and around the Williamsport Falls, to strengthen their community’s quality of life. The Community Foundation Serving Howard, Clinton & Carroll Counties used planning grant funds to engage a diverse array of residents in gatherings, focus groups and interviews about the communities’ most pressing challenges. With this input, foundation leaders developed a deeper understanding that issues relating to mental health and substance use disorders were critical community concerns and led to the recent opening of a comprehensive mental health and addiction treatment center.

In the area of education and youth, the report features a story about the Girl Scouts of the USA and Boys & Girls Clubs of America, two of nine national youth-serving organizations that received planning grants in 2022 through the Endowment’s initiative, Strengthening Youth Programs in

Indiana: National Organizations and Affiliates. The featured organizations used planning grants to work closely with leaders of their Indiana affiliates to identify the most pressing challenges they face. Planning helped them to understand better the barriers that keep young people from participating in their programs and to collaborate on developing new programs and approaches to reach more youth. The organizations placed a focus on serving youth from communities of color, youth from low-income families and immigrant families, and youth who have been affected by trauma and other adverse childhood experiences.

The youth programs of Calumet College of St. Joseph and DePauw University, two of 27 Indiana colleges and universities that received planning grants in 2022 through the initiative, Indiana Youth Programs on Campus, are also highlighted in the education section of this report. The schools used planning grants to identify their campuses' unique strengths and the summer programming needs and interests of youth. They then designed responsive, campus-based summer youth programs, with a focus on youth from populations that have been underserved by higher education, many of whom have never set foot on a college campus. Implementation grants are helping both institutions conduct their programs, which are introducing youth and their families to what higher education can offer.

A third education story describes how the Endowment is allocating up to \$85 million to support efforts to improve reading instruction for children in kindergarten through second grade in Indiana schools through the use of evidence-based teaching practices aligned with the Science of Reading (SoR). Planning grants to 31 Indiana colleges and universities are helping them consider how to incorporate SoR-aligned curricula into their teaching preparation programs. And a grant to the Indiana Department of Education is supporting its efforts to provide coaching and professional development in SoR teaching practices for a majority of Indiana's current kindergarten, first and second grade teachers.

The report also includes two religion stories. One features the collaborative learning of the Parish Collective supported by a planning grant through the Endowment's Thriving Congregations Initiative. Based in Seattle, Parish Collective's mission is to help congregations thrive by encouraging them to discern how God is calling them to develop their ministries through a sharper focus on what is happening in their neighborhoods. The planning grant helped the organization conduct listening sessions with congregation leaders outside its homebase in the Pacific Northwest to learn about what's happening in various faith communities and their increasingly diverse neighborhoods in southern California and in the Chicago area. An implementation grant is helping the organization extend its network to 12 cities across the country.

The other religion story explores how a planning grant to the Presbyterian Church U.S.A. through the National Initiative to Address Economic Challenges Facing Pastoral Leadership helped denomination leaders understand how challenges of financial insecurity were affecting their pastors. Through data about pastors' salaries and education debt and the insufficiency of retirement funds for clergy, they learned that pastors needed debt relief and improved financial literacy. Programs addressing these and other needs have been developed so clergy can better serve their congregations.

These stories provide only a glimpse of the passionate commitment and unceasing efforts of the thousands of people who carry out the missions of the organizations we are privileged to support. Given the fast-paced and complex world in which we live, many of them can only attend to the daily challenges their organizations face. We observe, and they tell us time and again, how valuable gaining a wider perspective is to their ability to further their missions and to improve the quality of life of the individuals, families and communities they serve. We are pleased to be able to help provide them the time and space to get on a "balcony," and to "cut a place for a lookout" with a new vista.

TRANSITIONS

In closing we acknowledge with gratitude the contributions of three colleagues who provided decades of service to the Endowment.

JULIE SIEGLER, vice president for administration, retired in 2022 after 31 years of exemplary work at the Endowment. Over the years, she played pivotal roles for us in grants administration, financial services, human resources and building management. We miss her gracious and fun-loving personality, which enhanced greatly our staff morale.

SHARON MINNER, grant coordinator in education, retired in 2022 also after 31 years at the Endowment. For many years, she was a key member of our central services staff. In 2007, she began applying her exceptional organizational skills to her role as grant coordinator in education. We also are deeply grateful to her for leading our staff's charitable giving program at Christmas for some 30 years.

Finally, we were profoundly saddened by the untimely death of TRACIE STUART in April 2022. Also a member of the Endowment's staff for 31 years, she was director of central services and guest services at the time of her death. Known for her efficiency and style, Tracie is greatly missed. We continue to be thankful for the ways she touched our lives and for her many contributions to the Endowment and its work.



N. Clay Robbins
Chairman & Chief Executive Officer



Jennett M. Hill
President



The Gift of Planning

Community foundations bolster leadership by listening, learning, planning

For Greg Aaron, Kokomo is truly home. He has lived in the city of nearly 60,000 residents his entire life. He graduated from Kokomo High School and Indiana University-Kokomo and built a career in public service here, working city jobs in traffic and engineering and then leading the Kokomo-Howard County Development Corp. Now he is president of the Community Foundation Serving Howard, Clinton & Carroll Counties.

Given his service to his community, if anyone in Kokomo was positioned to know about challenges facing this north-central part of Indiana, it was Aaron. Yet the toll of substance use disorder and unmet mental health needs in Kokomo and surrounding communities was often hidden from community leaders, including Aaron. In 2019 that began to change.

Through the seventh phase of its statewide initiative, Giving Indiana Funds for Tomorrow (GIFT VII), Lilly Endowment provided planning grants for Indiana community foundations to identify and prioritize the most pressing local needs and challenges in their communities and evaluate potential solutions. Planning grants were also intended to help foundations prepare for implementation grants to activate promising strategies to address the prioritized needs and challenges. The Endowment funding encouraged foundations to host community conversations, gather focus groups and conduct research, among other efforts, to find out what matters most to residents and other community stakeholders. Foundation leadership in Howard County and neighboring Carroll and Clinton counties seized the opportunity to question their assumptions and comb the community for ideas.

During a six-month period in 2019, leaders hosted community gatherings in all three counties. Residents shared hopes that their communities could become places marked by strong mental health and economic well-being, cultural diversity and freedom from drugs. Additional conversations with healthcare providers, law enforcement personnel and mental health experts shed light on the need to address the impact of addiction and mental illness. Research about how individuals and families were being affected by addiction and mental illness added to the planning process, Aaron says.

Naketa Catzhings (opposite, left) manages Recovery Café, a program of Turning Point-System of Care in Kokomo. Samantha Mansfield (opposite, right) is a member of Recovery Café (right). Greg Aaron is president of the Community Foundation Serving Howard, Clinton and Carroll Counties.



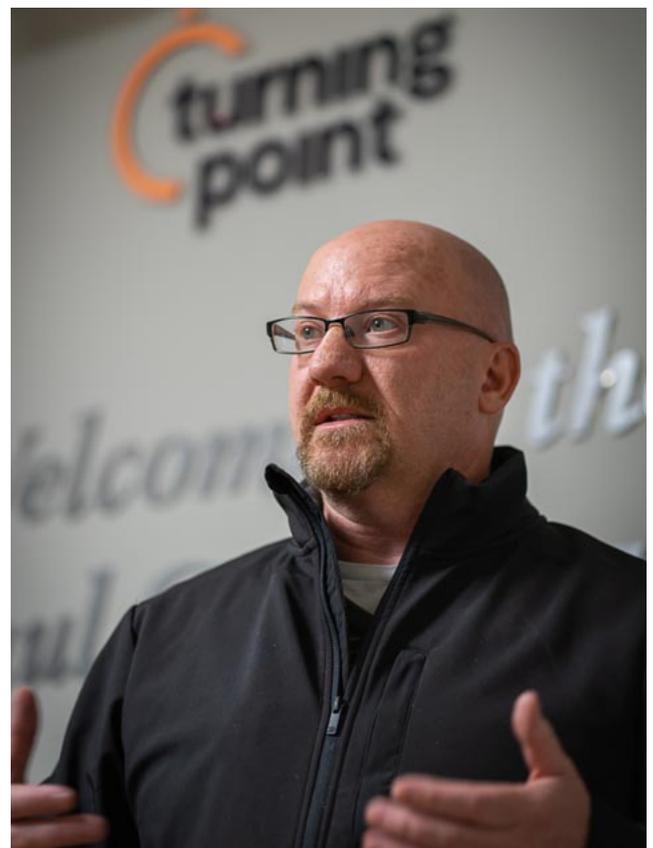


“At the forums we learned from law enforcement officers that a drop-in center for people in crisis would be helpful, instead of having emergency rooms and jails as the only options for first responders,” Aaron recalls. “So many people are affected by these issues.”

It was becoming clear that there were not enough services for individuals facing substance use disorders and mental illness. Although Turning Point-System of Care, a local nonprofit providing mental health services and referrals, was doing its best to help, the community needed more. Planning grant activities led to a new strategy in Howard, Carroll and Clinton counties that the Endowment supported in 2020 with implementation grants totaling just over \$5 million.

With those funds, Turning Point was able to turn the former Columbian Elementary School into a care center where clients attend support meetings. Individuals in crisis can stay for several days with direction and care from addiction specialists. Relationships with law enforcement agencies, area hospitals and Mental Health America-Wabash Valley Region in Carroll County and Healthy Communities in Clinton County are helping Turning Point keep people in need of treatment for substance use disorders and those experiencing mental health crises out of jail and the emergency room when possible.

“It was critical that we had consensus on what the priority was and how a drop-in center could meet various needs within the community. This helped us be able to share the rationale and the



vision for the project, which helped people immediately support the project,” says Matt Oliver, Turning Point CEO. “The community conversations were invaluable.”

Samantha Mansfield, at age 30, has received a new lease on life through Recovery Café, a Turning Point program. The Kokomo resident is connecting with staff, others recovering from substance use disorder and new friends who are helping her to emerge from years of substance abuse.

“I am safe there,” Mansfield says. “Just about everyone in the room has experienced in one way or another the feelings I have. I’m not able to see the beauty in myself by myself. It gives me hope that even if I’m having a bad day, it’s just a bad moment in my day. It keeps me from impulsive decisions.”

Aaron believes the timing of the GIFT VII initiative could not have been better. The foundation had just completed a strategic plan, but the Endowment’s planning grants nudged leaders to rediscover the potential to inspire change far beyond the organization’s long-standing roles of distributing local grants and scholarships.

“We accomplished so much more than with our strategic plan,” Aaron adds. “The Endowment grant built our credibility. We listened.”



Community unites to develop long-desired recreation site

A \$50,000 GIFT VII planning grant to the Warren County Community Foundation prompted a surge in community engagement among residents in this largely rural county west of Lafayette, Ind.

Planning dollars inspired foundation board members and other local leaders to attend conferences and brainstorm with representatives from Ball State University’s Indiana Communities Institute. Community conversations with local residents, including 150 high school students, initially focused upon the needs of senior citizens and youth, possible economic development projects, and efforts to attract and retain young professionals in the region. Soon, however, foundation leaders realized that there was consensus around another idea: residents really wanted to see Williamsport Falls become a recreation destination.

At 90 feet, Williamsport Falls is the tallest freestanding waterfall in Indiana. Residents have long considered the location a social center for locals and a potential tourism attraction, particularly considering its proximity to the town center of Williamsport. During the planning process, foundation leaders were reminded that more than five decades earlier—in 1964—local residents documented their vision for Williamsport Falls as a tourist destination. “These ideas have come up time and time again. Children and grandchildren of those earlier citizens have been among the new wave of community development participants,” according to the proposal from Warren County Community Foundation for an implementation grant to support the creation of the new Falls Branch Park.

The Endowment awarded a \$350,000 implementation grant, which energized volunteers and helped the community foundation solicit in-kind donations to develop the park.

Jamie Jackson and Rufus Perkins (opposite above) are members of Recovery Café. Matt Oliver (opposite) is CEO of Turning Point-System of Care. Recreation areas in Warren County were the focus of community foundation efforts (above).



Community foundation planning led to a focus on new signs and trails in Warren County recreation areas (above).

Residents stepped up and built a nine-hole disc golf course through the falls valley. Others removed invasive plant species, such as bush honeysuckle. A Williamsport business specializing in laser metal cutting, AccuBurn, designed and built trail signs and a welcome sign for the falls area. Town employees created a rock trail. The Metropolitan School District of Warren County contributed a strip of land near the top of the falls to improve access for a planned farmers market and picnic area. Permanent corn hole games, picnic tables, benches and charcoal grills will be installed at the top of the falls. Stairs linking the top and the bottom of the falls are under construction.

Momentum ignited by the planning grant helped the community foundation expand its engagement with county government, which led to converting a wooded former Boy Scout camp into a nature

center called Fleming Woods County Park. Miles of trails through largely unspoiled forest now include outdoor musical instruments to spark young imaginations, an amenity made possible by an \$8,600 grant from Subaru's SIA Foundation. And tree stumps carved into shapes of animals and mushrooms now enliven hikes and school cross-country practices.

Warren County Community Foundation Executive Director Michele Stucky says that in-kind support is valued at \$255,000, and she estimates that one in 10 of the county's 8,440 residents have participated in the endeavors to develop the falls recreation area.

The improvements fit neatly into plans by Wabash River Enhancement Corp. to make the falls trail a spoke for the planned 90-mile Wabash River Greenway, which will pass alongside Williamsport. The greenway is one of the initiatives of Wabash Heartland Innovation Network, a 10-county consortium funded in 2017 with \$40 million in funding from the Endowment through its Strategic Community Advancement Initiatives.

The burst of GIFT VII-inspired activity also prompted the first major update to the Warren County/Williamsport parks plan since 1996 and the first update to the county comprehensive plan since 1979.

"We have gained confidence as a community that we can address tough issues facing small, rural communities," Stucky says. "The GIFT VII funding has given our county momentum that will carry us through many other projects and a platform to create partnerships that will last for many years to come."

AT A GLANCE

Giving Indiana Funds for Tomorrow

GIFT is a Lilly Endowment initiative designed to help strengthen community foundations in Indiana and build their capacity to support the needs of their local communities. GIFT has helped community foundations develop their leadership capacities, fund special projects, build unrestricted endowments and inspire others to give through challenge grants.

Between 2019–2020, through the seventh phase of the initiative (GIFT VII), the Endowment awarded:

- Noncompetitive planning grants totaling \$5.6 million. The grants to 73 community foundations ranged from \$50,000 to \$200,000.
- Noncompetitive implementation grants totaling \$11.25 million. The grants to 86 community foundations ranged from \$75,000 to \$500,000.
- Competitive large-scale implementation grants totaling \$33.5 million. The grants to 11 community foundations ranged from \$250,000 to \$5 million.

When the GIFT initiative began in 1990, there were fewer than a dozen Indiana community foundations. Today, there are 94 community foundations and affiliate funds making grants to support local charitable organizations in all of Indiana's 92 counties. The combined assets of community foundations that have regularly participated in GIFT have grown from \$100 million in 1990 to more than \$3 billion at the end of 2021.

Holistic Approach

Pathways to Opportunity offers clients support and mentoring to achieve financial and personal stability

For decades, there have been programs to help individuals with disabilities train for employment and find work. Among them were the job-training and placement efforts of Easterseals Crossroads.

But the central Indiana organization wanted to do more, especially for individuals living in or near poverty.

In 2020, the organization received a \$50,000 planning grant through Lilly Endowment's initiative, Enhancing Opportunity in Indianapolis. Funding helped Easterseals Crossroads find out what it needed to do to bring its clients facing financial instability out of poverty and to reach more individuals who need support but who were not yet connected to Easterseals Crossroads.

The organization concluded that it should develop a holistic program to address many aspects of the lives of individuals with disabilities—housing, food, mental health, family dynamics, legal issues, transportation, education and, of course, employment. Because without stability in those areas of life, a job only goes so far.

The result: Pathways to Opportunity, a program that provides intensive support, job training, mentoring and other services to individuals with disabilities living in Indianapolis. In 2021, Easterseals Crossroads received a \$5 million grant



Cyrus Sutherlin is a client of Pathways to Opportunity, a program of Easterseals Crossroads.



from the Endowment to implement Pathways. Participants are residents of Indianapolis living at 185 percent of the federal poverty level. Their diagnosed disabilities are varied. Among them are developmental and cognitive disabilities,

mobility issues, mental illness and chronic health conditions.

“We knew we couldn’t just solve this problem by tweaking a solution that’s been in place for decades,” says David Dreith, Easterseals Crossroads President and CEO. “We had to break it down and start from the beginning.”

Planning sessions sharpen understanding of challenges

During a four-month planning period, the leadership team convened brainstorming sessions. Staff in employment services, veterans’ services, and autism and behavior services gathered to get a broader understanding of the needs and challenges faced by the individuals they serve. They surveyed clients and conducted a focus group to learn about the specific barriers to employment and financial security. The feedback was clear: individuals struggle with transportation, childcare, and adequate job skills and other training. Overall, too many lack a support system that could help them make strides toward achieving lasting financial security.

David Dreith (above) is Easterseals Crossroads President and CEO. Sam Melvin (below) is a client in the Pathways to Opportunity program.

“Having that period to plan really did help us to hone our proposal,” Dreith says. “Lilly Endowment recognized the importance of planning and said, ‘You’re going to learn from the planning process and you may deviate from your original plan. We want to support your learning.’”

In the new program developed by Easterseals Crossroads, each client is assigned a career navigator who guides them through every step of obtaining essential resources, including finding a job with a living wage. In Indianapolis in 2020 that meant earning \$18 an hour and benefits.

The Pathways program is now in its second year, and Dreith says it’s been successful in part because the Endowment grant enabled Easterseals Crossroads to plan. The organization developed a program model and strategies; hired program manager Karen Causey, who has a long history of working with individuals with disabilities; and connected with other community organizations to see what services already existed.

Circles Indy is one of roughly a dozen community organizations that Easterseals Crossroads is connecting with for the Pathways program. Dedicated to helping individuals and families who are living in poverty, Circles Indy provides Pathways clients with a 14-week training called Getting Ahead, which teaches self-sufficiency skills and provides them with a “circle of support.”

“We have a two-way relationship with our partners,” Causey says. “We refer participants to their programs that have already been developed and are successful and they refer participants to our program when our services better meet their participants’ needs. Our program is high touch and very comprehensive.”

Easterseals Crossroads works with clients to determine which resources they need by identifying the barriers they face and their level of self-sufficiency. Staff members also perform career assessments to

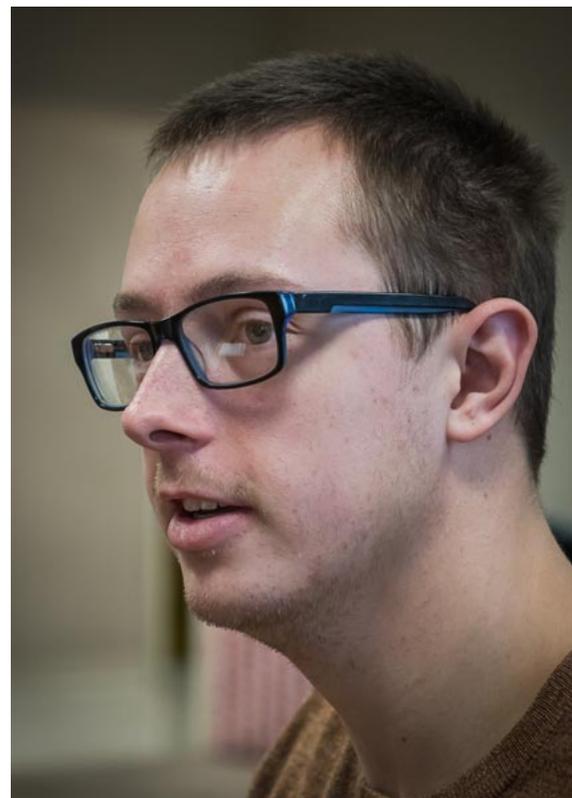


figure out program participants' aptitudes and interests. Then, they develop step-by-step plans for success. The message? 'If you do all these things, your chances to become self-sufficient are much higher.' Referrals to other resources and programs often are put in place to help make the plans come to fruition.

a car wash with little prospect for advancement. He was living with his father but needed to find his own place. Among his needs, aside from a more stable job and a place to live, were mental-health services to help him with anger and depression issues; financial literacy training to keep him from spending every dollar he earned; and legal assistance to help expunge some of the charges on his record.

"It's time to grow up now," Sutherlin says, tearing up as he tells his story. "It's time to stop that childish behavior."



In late 2021, Easterseals Crossroads began enrolling participants in the Pathways program with the goal to lift 150 Marion County residents with disabilities out of poverty by the end of 2026.

"It's not high volume," Causey says, "but it's high intensity."

One-on-one attention helps client focus on goals

One of the first-year clients is Cyrus Nickolas Sutherlin, 56 years old. Diagnosed with post-traumatic stress disorder, he had spent six years in the U.S. Army and more time than that in prison. When he entered the Pathways program in spring 2022, Sutherlin had a job at

Bill Stetzel and Karen Causey (above) provide mentoring and other intensive support to Pathways to Opportunity clients.

Bill Stetzel is Sutherlin's career navigator. He's also the business liaison for the Pathways program, developing relationships with companies to help people get jobs and become successful employees. In the first eight months since Sutherlin joined Pathways, he received:

- **Financial aid to afford the \$1,500 upfront cost for rent he needed to move into his own place.** "I've come this far from nothing," he says. "Now I've got a little something ... I've got a key that is my own."
- **Help with his resume and with how to handle a job interview, including how to talk about his criminal history.**
- **Counseling from Eskenazi Health Midtown Community Mental Health, where he is learning to respond constructively to stressful situations.**
- **Financial literacy education so he can better manage money. Sutherlin pulls out his phone and proudly shows the balance in his savings account.**
- **Job placement. Sutherlin works in janitorial services/maintenance for \$17 an hour at Fastenal, a distributor of industrial and construction products.**

As 2022 ended, Sutherlin had goals. He was working toward earning a raise so he could afford to move closer to work (his commute is two hours each way); continuing to learn to better handle stress and emotional ups and downs; striving to become Fastenal's employee of the year; and developing computer competencies and soft skills so he can advance in the workforce.



“We’re trying to put Cyrus—and everyone we’re working with—on a path to independence and self-sufficiency,” says Marjorie Duryea, director of employment programs for Easterseals Crossroads. “Long after we’re done, when Cyrus has a problem on a job, we want him to know how to handle it.”

“Sometimes, you gotta do what you don’t want to do to get where you’re trying to go,” Sutherlin says. “I do the best I can every day. Mr. Bill, Miss Karen—they’ve been helping me really intentionally. I appreciate that. They went out of their doggone way to help me. I help myself, but I still slip up.”

Long-term goals include financial independence and self-sufficiency

Sam Melvin, at 24 years of age, is another Pathways client finding success. When he joined the program, he was out of work and needed safe housing, financial literacy training and a meaningful job where he could advance.

Melvin lives with autism. He needed help to succeed on the job. Causey, who is serving as his career navigator, worked with Melvin so he could become more comfortable with interviewing. She also helped him understand the skills he needs for employment success. Stetzel helped Melvin land an interview with Thermo Fisher Scientific, a company that provides goods and services to organizations working to cure cancer, protect the environment and ensure food safety.

Melvin got the job. He’s an inventory specialist, earning \$17 an hour to start, with a pathway to \$18.

With the job in place, housing was the next goal—he was living with his mother at the time and looking to get his own apartment—along with mental-health services. The Pathways program connected him with Adult & Child Health in Indianapolis for counseling. He also is learning financial literacy after racking up credit card debt buying, among other things, video games.

Causey also recommended Circles Indy, where Melvin will connect with an ally who will provide personal and professional mentoring. When he experiences stress or a stumble, the ally is someone to call.

Melvin says his long-term goal is “to stabilize myself. It’s all about financial management and keeping everything together.”

Causey says her long-term goal for Pathways to Opportunity “is to have someone complete the program and later be hired for a career navigator position. What better source to help someone navigate than someone who has experienced being successfully navigated.”

Marjorie Duryea (above) directs employment services programs at Easterseals Crossroads.

AT A GLANCE

Enhancing Opportunity in Indianapolis

Enhancing Opportunity in Indianapolis is a Lilly Endowment initiative designed to help individuals and families facing complex and varied challenges associated with poverty make progress toward lasting economic self-sufficiency.

In 2020, through this competitive initiative, the Endowment awarded planning grants totaling \$1.2 million to 33 organizations. In 2021, the Endowment awarded grants totaling \$93.6 million to help 28 organizations implement their Enhancing Opportunity plans. The Endowment encouraged applicants to propose approaches to help create more good and promising jobs and help more residents attain those jobs. The Endowment expressed a special interest in proposals that would help increase economic opportunity for Black and Latino residents, who are disproportionately affected by poverty, and enhance the prosperity of individuals facing added challenges, including individuals with disabilities, youth aging out of foster care, individuals experiencing homelessness, and immigrants facing language and other barriers.

Although the Endowment acknowledges that the efforts funded through this initiative will not come close to ending poverty in Indianapolis, it does hope that they will help put thousands of Indianapolis residents on the path to self-sufficiency.



On-Campus Summer Programs Serve as Community Outreach and College and Career Prep

Summer camp often signifies canoeing, horseback riding and campfires. These days the concept can encompass a lot more: enrichment programs focused on activities as varied as STEM labs, media arts, emotional resiliency, equity and entrepreneurship all geared toward helping young people prepare for college and careers and rewarding and engaged lives.

With support from Lilly Endowment, Indiana colleges and universities are ramping up their summer camp offerings for youth. In 2021, the Endowment launched Indiana Youth Programs on Campus (IYPC), a multiyear, \$31 million initiative aimed at helping Indiana colleges and universities create new and expand existing educational and experiential on-campus summer programs or camps for young people. On-campus summer camps are a vital means of outreach for colleges and universities, especially as they seek to better serve more first-generation college students, students from communities of color and students from families with limited resources.

The Endowment's initiative is, in part, a response to the significant decrease in the number of Hoosiers pursuing post-secondary education. In 2015, 65 percent of Indiana high school graduates were pursuing some form of post-secondary education. That rate has dropped steadily since. By 2020, only 53 percent of Hoosiers were pursuing post-secondary education the year after high school graduation.

Calumet College of St. Joseph student Dylan Hill helped lead a sports and wellness summer camp on campus for middle school students.



To help interested institutions develop high-quality camp programs, the IYPC initiative included a planning phase, with grants of up to \$50,000 available to help underwrite the costs associated with camp planning. Those plans then became the basis for proposals the institutions submitted for implementation grants of up to \$1 million per college or university. Through the initiative, the Endowment awarded 27 planning grants and 35 implementation grants.

Time to rethink, reimagine

Calumet College of St. Joseph in Whiting, Ind., used a \$50,000 planning grant to rethink its approach to summer camps. The private college of nearly 700 students had a history of holding summer camps for young people in the northwest region of the state, but the COVID-19 pandemic led to a two-year shutdown. The IYPC planning grant reinvigorated the camps program, says Calumet President Amy McCormack.

“It was great to have the opportunity to engage faculty in revitalizing former camps and discussing ideas for new camps to serve our youth,” McCormack says. “It allowed us to take an institutional approach.”

As part of its planning phase, Calumet held three pilot camps in June and July 2022. One focused on reading enrichment for elementary students. Another was aimed at helping middle schoolers learn physical and mental resiliency. The third was a media camp for high school students.

For its pilot camps, Calumet turned to its student body for counselors. “We wanted to hire students to be role models for the young people coming to the camps,” McCormack says, “and we wanted to be able to pay them competitive wages. The planning grant allowed us to do that, as well as to hire administrative help.”

One of Calumet’s counselors was Mackenzie Pickens, an education major. She worked with a group of the youngest campers in the four-week reading camp. Because her campers were first graders, there wasn’t a lot of attention paid to college life, Pickens says, but she gave them a sense of being at summer camp by setting up beach chairs and a tent in her classroom. “The kids came in excited every day,” Pickens says. “And it was a great experience for us as teachers.”

Tabitha De Lion, a senior at Calumet with a double major in digital and studio arts and English and media communications, worked with older students in the summer media camp, a week-long intensive session focused on digital and media literacy and social justice. As part of their experience, says De Lion, the campers met with faculty members in their classrooms and experienced what it would feel like to be treated like a college student. “Everyone was fully engaged,” she says. “At the end, when we asked if they would come back again, everyone said they would.”

Dylan Hill had a similar experience. A Calumet basketball player and campus leader, he was a student counselor in the camp for middle schoolers. Created in collaboration with Maroon Village, a sports performance program in nearby Gary, the camp used yoga, breathwork and mindfulness, to teach resiliency, an important component of success not only in sports but in school and life as well. At the same time, the campers got a sense of the community at Calumet, Hill says. “They were in our new gym and outside on the campus. They loved it.”

The college learned a lot by having the pilot camps, according to Ginger Rodriguez, Calumet’s executive director of grants and strategic initiatives. “We learned more about timing outreach to the community, developing partnerships, engaging with families, and evaluating youth programs.”

The result of the planning was a proposal that led to a three-year, \$565,495 implementation grant. For its 2023 summer program, Calumet will not only be repeating the themes of the three pilot camps, but it also will add earth camp, activities exploring the science of sports, a program focused on Shakespeare, and a math jump start program. While continuing its partnership with Maroon Village, the college is developing new collaborations with elementary schools in the Catholic Diocese of Gary, the Gary Shakespeare Company and the Dunes Learning Center, an education partner of the Indiana Dunes National Park.

Such an ambitious program was possible because the planning grant enabled Calumet to be intentional about developing its camps. “With funding to pay faculty, we were able to develop specific curricular structures and the assessment instruments that went with them,” Rodriguez says.

One of the unexpected outcomes of the camps was a chance to connect with parents, many of whom stayed on campus during their children’s camp sessions. As a result, the college’s librarian is developing resources that align with each of the camps that Calumet will offer in summer 2023. “We’ve also decided to have parent coffees,” Rodriguez says, “which will give us an opportunity to talk not only about Calumet College, but college in general and how they get from wherever their children are now to where they want them to go.”



President Amy McCormack of Calumet College of St. Joseph (opposite) says summer camps on campus are thriving again. Summer programs on campus are part of a strategic effort to inspire young people to consider college, says DePauw University President Lori White.

Listening and responding to youth

At DePauw University in Greencastle, Ind., a planning grant was vital to the university’s ability to develop a successful implementation grant proposal, according to President Lori White. Through the initiative, DePauw received \$49,700 for planning and a \$1 million implementation grant to fund three years of a multi-faceted summer camp program set to begin in 2023.

“We have not had a robust cadre of youth camps on our campus,”



White says of the university, which has more than 1,750 students.

“The planning grant enabled us to survey potential participants and our community as to what kind of youth camp would best align with student passions, our strategic plan and our institutional values.”

DePauw introduced a new strategic plan in spring 2022 that called for expanding its longstanding College of Liberal Arts to The College of Liberal Arts and Sciences. It also included a commitment to create a school of business and leadership and a multi-faceted media school, as well as a focus on institutional equity. All those elements became foundational to the planning for DePauw’s summer camp program, which will include sessions on science and technology; creativity and innovation; art and performance; business and leadership; and equity, sustainability and social change.

Equally important, White says, was how the planning grant gave the university the ability to survey 1,700 high school students to determine what would be of interest to them. Based on the survey results, university leaders decided to offer two-day camps rather than more traditional week-long sessions. Many high school students have summer jobs or are caring for younger siblings and couldn’t commit to more than a two-day program.

Indiana Youth Programs on Campus

Indiana Youth Programs on Campus (IYPC) is a Lilly Endowment initiative designed to help Indiana colleges and universities in their efforts to create new or expand and enhance existing high-quality, on-campus programs for Hoosier youth, ages 5–18. Beginning in 2021, the Endowment awarded planning grants to 27 Indiana colleges and universities and in 2022, the Endowment awarded implementation grants to support 35 Indiana colleges and universities in developing programs to help young people further explore their interests, learn new skills and envision a future for themselves in college.

Goals of the initiative are to:

- Increase opportunities for Indiana youth to participate in learning experiences on college campuses that will expose those youth to Indiana's higher education institutions while providing them with experiences that will, among other things, help prepare them for success in college and later life.
- Increase the numbers of Indiana youth who successfully attend Indiana colleges and universities and obtain valuable postsecondary degrees and credentials and thereby help strengthen the institutions and improve the education levels of Indiana residents.
- Address the decline in the percentage Indiana adults with a bachelor's degree or a meaningful post-secondary credential and to help Indiana colleges and universities recruit and educate more students of color, first generation college students, and students from families with limited resources.

The Endowment made a \$2.2 million grant to American Camp Association (ACA) to provide technical support to colleges and universities participating in the IYPC initiative. ACA is a national organization based in Martinsville, Ind., that provides training, technical support and other resources to organizations that offer camp programs to youth, including higher education institutions.



The survey also revealed a need to educate students about the myths and realities of college life. That led to a sixth summer offering: College 101. It will cover such topics as how to prepare for college, how to be successful as a college student and how to ensure success after graduation.

“We have a particular interest in first-generation students and students who want to go to college but may not know how to get there,” White says. “We wanted to make sure that what we offered, and our program length, aligned with the students whom we most want to attract to our campus.”

The planning grant enabled White and DePauw faculty and staff members to consider the best way to design and deliver a high-quality youth program. “I’ve often seen grant opportunities and thought, ‘That’s a great idea.’ And yet, who has the time? The planning grant allowed us to take the time and have the resources for thoughtful, intentional planning,” White says.

DePauw also sees this as an opportunity to connect with parents, families and our community-based organization partners. “DePauw’s summer experiences will include sessions tailored to families in addition to the programs offered to students. We want to help families navigate the college admission process.”

In the end, White adds, the benefit of the IYPC initiative is that it is encouraging individual colleges and universities to showcase what they have to offer and what higher education has to offer young students throughout the state. “The net positive result of our camps and all the camps sponsored by the Lilly Endowment

initiative is that hopefully when these young people leave any of our campuses, they can see themselves as college students.”



Calumet College launched new summer programs on campus (above left). As part of DePauw University's youth outreach, physics professor Jacob Hale (above) works with Greencastle, Ind., students Clair Langdon, 9th grade (left) and Chloe Jackson, 7th grade.

Gaining Fresh Perspectives to Support More of Today's Youth



Planning grants help youth organizations find deeper insights about barriers to participation

As CEO of Girl Scouts of Central Indiana, Danielle Shockey regularly checks data related to the well-being of youth—especially girls. Much of the research reveals troubling trends; among them are an increase in the number of youth experiencing anxiety, depression and suicidal tendencies.

Yet, she also is familiar with another data set—one that shows the impact that youth organizations can have on a young person's development and sense of well-being, which leads to higher rates of high school graduation, college attendance and gainful employment. That type of research gives Shockey hope that Girl Scouts and other youth-serving organizations can make inroads in providing the support children and teens need for improved well-being.

Girl Scouts of Central Indiana Troop 9073 meets at Elace Academy, a westside Indianapolis school.

Through Lilly Endowment’s initiative, Strengthening Youth Programs in Indiana: National Organizations and Affiliates, the Girl Scouts of Central Indiana and five other Girl Scout councils across the state, in concert with the Girl Scouts of the United States of America (GSUSA), are collaborating to better serve girls in Indiana. In 2022, GSUSA was one of nine national youth-serving organizations with affiliates and chapters in communities throughout Indiana that received planning grants. The \$100,000 planning grants helped the organizations understand better the perspectives and challenges of youth in Indiana and design strategic approaches to strengthen their programs and reach more youth, especially youth who have been underserved in the past. The nine organizations then received implementation grants, which are helping them respond to the needs of Indiana youth in a variety of ways. They are developing new programs for teenagers, improving support for students facing mental health challenges, addressing barriers that prevent young people from accessing their programs and renovating buildings and constructing new facilities.

Identifying barriers

An important aspect of the Strengthening Youth Programs in Indiana initiative was a planning grant that helped Girl Scout leaders across Indiana gain crucial insights about what keeps children and teens from joining youth organizations. According to Shockey, Indiana affiliates reach less than five percent of the population that could join Girl Scouts.

“The grant gave us the opportunity to go out into the communities to reach families that we want to serve better,” Shockey says. “But, instead of showing up assuming they want to be in Girl Scouts, we asked questions like, ‘How can we, together, help Hoosier girls, specifically those you care about, to have a healthy and happy childhood? A supportive teen experience? And how can we support you and this community?’”

“Before the planning grant, we never came together to ask, ‘How can we do this differently or go at this in a way that we’ve never done before?’,” Shockey says. “The planning grant allowed us to partner with research experts, people who could help us with understanding the barriers that keep girls from participating.”

The other Girl Scout councils included in the collaborative are the Girl Scouts of Greater Chicago & Northwest Indiana, Girl Scouts of Kentuckiana, Girl Scouts of Northern Indiana Michiana, Girl Scouts of Southwest Indiana, and Girl Scouts of Western Ohio.

“Thanks to the collaboration across six Indiana-serving Girl Scout councils, we are reaching a comprehensive population of girls across regions and demographics,” says Sofia Chang, who was CEO of GSUSA at the time the Strengthening Youth Programs in Indiana

initiative began. “This allows us to gain a more holistic view of all the challenges to participation so that we can meet the needs of all girls in Indiana and then scale those learnings nationally.”

Listening to the voices of youth and their families

Research and listening sessions funded by the Girl Scouts planning grant provided comprehensive insights that informed an implementation grant proposal from GSUSA. In September 2022, the national organization received a \$15 million grant to support a three-year collaboration among Girl Scout councils in Indiana. During that grant period, which runs through September 2025, the coalition will serve as an incubator of creative solutions on how to reach and better support Hoosier girls and families in all 92 Indiana counties. Across the state, regional Girl Scout organizations will use implementation grant funds to improve staff training, strengthen offerings that are connected to after-school programs and develop outreach, particularly to girls from immigrant populations, communities of color and families with limited resources.

The coalition was able to analyze data about poverty, literacy and academic performance from various sources, including information from the Girl Scout Research Institute, to develop a gap analysis, says Nancy Wright, CEO of Girl Scouts of Greater Chicago & Northwest Indiana. That process helped Girl Scout leaders understand how to better serve and reach girls and their families in different types of communities—including urban, suburban and rural.

When surveyed about why they did not participate in youth organizations, four out of five families said costs—both upfront costs and ‘hidden’ costs, such as activity fees—were barriers. One Indiana mother who was surveyed recounted showing up to a Girl Scout registration meeting with her 6-year-old daughter only to leave without making a commitment. “I never did sign her up because the \$50 (fee) would be just to get started,” the mother responded. “I didn’t have that yet. So we’re kind of waiting, for now.”



Another mother underscored the difficulties of navigating work demands, fighting rush hour traffic, and ensuring that her three children had transportation to three different after-school programs. This perspective illustrated the need to support after-school Girl Scout programs hosted at schools as a way to eliminate barriers to participation.

During the planning phase, the Girl Scouts collaborative identified the need to better equip youth workers to support young people who have experienced trauma, especially because mental health issues are among the top concerns for both girls and their families. “We realized that we needed to train our staff differently,” Wright says. “We have first aid and CPR training but, we started talking about psychological first aid. What does that look like for our young people at this pivotal time?”

Girl Scouts of Greater Chicago & Northwest Indiana piloted a mental health training program for staff and adult leaders that will be rolled out statewide. The training will be supplemented by community conversations and peer learning groups. Girl Scouts councils across Indiana will then bring training to key volunteers serving their organizations.

Research ready

When a planning grant opportunity emerged in 2022, the Boys & Girls Clubs of America (BGCA) was ready to explore how to strengthen its programs to reach more youth. In 2020, it had taken a deep dive into data about youth in Indiana and about the availability of out-of-school time programs across the state. Through that 2020 study, BGCA learned that:

- **There is a need for more programs serving Indiana teens. Teens make up less than one fifth of enrollment in Indiana Boys & Girls Clubs. Almost half of youth served are ages 6 to 9.**
- **Geographic areas with more than 1,000 youth have fairly good access to out-of-school time programs, but areas with fewer youth have limited opportunities.**
- **One in five of Indiana’s youth are living in poverty, and an additional 23 percent are living in low-income families.**
- **Rates of reported anxiety and depression among youth are on the rise.**



In 2022, BGCA used a \$100,000 planning grant from the Endowment to explore responses to these data. It brought together leaders of the Atlanta-based national organization with leaders of all 31 Club organizations in Indiana. Through a series of virtual and in-person meetings, they created together a statewide implementation plan that includes capacity building, constructing new or improving existing facilities, and developing and expanding quality programs

targeting youth in low-income families, youth from communities of color, teens (ages 13 to 18) and youth who have an acute need for a safe environment with adult mentors. An overarching goal of the plan is to increase the number of youth served by 30 percent during the next two years. The Endowment made a \$30 million implementation grant to BGCA to support this strategic effort.

“The planning grant enabled us to look holistically at the needs of kids, families and communities throughout the state of Indiana, and now we have a chance to make an unprecedented impact in Boys & Girls Clubs across the state,” says Jim Clark, BGCA’s president and CEO. “We are grateful for this support and look forward to sharing some incredible outcomes in the coming years.”

In late 2022, the 31 Club organizations in Indiana assessed needs in the local communities they serve and evaluated how they could address, according to Josh Westfall, national director of foundation relations at BGCA. Then, Indiana Club organizations submitted funding proposals focused on two-year strategic and sustainable growth plans with performance-based goals tied to these funding categories:

- **Capacity building to reach more young people and break down barriers that prevent youth in most need of programs and services from participating.**
- **Capital projects, such as opening new sites or improving existing facilities.**
- **Program development to strengthen existing programs or develop new programs that are relevant to the needs of youth.**
- **Collaborative efforts, including shared services for functions like data management, communications and human resources.**

Letecia Bernal works with Girl Scouts in Troop 9073 (opposite). Jim Clark, president and CEO of Boys & Girls Clubs of America, and Maggie Lewis, CEO of Boys & Girls Clubs of Greater Indianapolis.

Club organizations are eligible for subgrants from BGCA ranging from \$200,000 to more than \$2 million depending on each Club's performance-based goals within the funding categories. A steering committee of 11 members representing Club organizations in Indiana is helping BGCA with the funding process.

"The support from the Endowment grant to BGCA is about improving access so that all of our Clubs offer high-quality programs, better understand the lives of young people and make sure kids can have safe and enriching places to be in the important after-school hours and during summertime," says Maggie Lewis, CEO of Boys & Girls Clubs of Greater Indianapolis.

A member of the steering committee, Lewis has led the Club organization serving Indianapolis since 2018. Joining colleagues from Clubs across the state in the planning process with BGCA was crucial to helping leaders think carefully and strategically about how to do better.

"I think we get busy in the not-for-profit space doing the work, having so much to do each day," Lewis says. "To have the time to pause and step back and gather the data, to have conversations about how to be better, it really has helped us and motivates us to do even more and do it effectively."

For Boys & Girls Clubs of St. Joseph County in northern Indiana, doing more and doing it effectively means helping the 624 children and youth on the organization's waiting list find a place in a local Club. "Those kids on that waiting list keep me up at night," says Jacqueline Kronk, CEO of the Club organization since 2020. It serves 3,000 youth each year.

Getting those young people off of the waiting list and into programs is critical. Then comes strengthening and expanding academic support offerings. New funding through the grant to BGCA can be used to help the local Club organization strengthen STRIVE, its program that helps students with reading, math fluency, emotional well-being and college and workforce readiness.

Additionally, Boys & Girls Clubs of St. Joseph County hopes to use new funding to renovate its flagship Club in South Bend, build a teen center, and bring Club programs to rural communities in nearby Pulaski, Cass and Fulton counties. Currently, these areas have little to no enrichment programming for youth.

Kronk says she has seen the often life-changing impact Boys & Girls Clubs can have in the lives of young people and in their families. "Right now, there are parts of Indiana where there are no Boys & Girls Clubs. This funding can help us change that so that more kids will have places to go when they're not in school where they feel they belong and they know they are cherished."



Jacqueline Kronk, CEO of Boys & Girls Clubs of St. Joseph County.

AT A GLANCE

Strengthening Youth Programs in Indiana: National Organizations and Affiliates

Lilly Endowment designed the Strengthening Youth Programs in Indiana: National Organizations initiative to help youth-serving organizations in communities across Indiana better meet the needs of children and youth, ages 5 to 18, in communities statewide. The Endowment encouraged organizations to prioritize reaching more youth who are in low-income households or are members of communities of color or immigrant populations or who lack adult supervision and protection or are exposed to trauma or other adverse childhood experiences.

During 2022, the Endowment made grants totaling \$91 million to nine national youth-serving organizations to propose ways in which their Indiana affiliates or chapters could enhance and expand their collective impact on Indiana youth. The total grantmaking included nine planning grants of \$100,000 each and implementation grants ranging from \$3 million to \$30 million. The organizations and implementation grant amounts are as follows:

Big Brothers Big Sisters of America, Tampa, Fla.
\$5 million

Boys & Girls Clubs of America, Atlanta
\$30 million

Girls Incorporated, New York
\$3 million

Girl Scouts of the USA, New York
\$15 million

Junior Achievement USA, Colo.
\$7.5 million

National Boy Scouts of America Foundation, Irving, Texas
\$10 million

National Council of YMCAs of the USA, Chicago
\$15 million

National FFA Foundation Inc., Indianapolis
\$3 million

YWCA USA, Inc., Washington
\$3 million

Addressing Economic Challenges

Planning helps organizations identify financial needs of pastors and congregations

The Rev. Matthew Baker can't remember the exact date that he was awarded the \$10,000 that would change his family's finances and his ministry as a congregational pastor. But six years later, he easily remembers the flood of emotion that followed.

"Relief," he recalls. "Just such a feeling of relief."

It was a feeling made possible because of support from Healthy Pastors, Healthy Congregations, a program launched as a pilot in 2016 by The Board of Pensions of the Presbyterian Church (U.S.A.) and then expanded nationally in 2018.





“YOU JUST CANNOT LIVE ON ONE PASTOR’S INCOME AND BE IN THE MIDDLE CLASS, EVEN IF YOU TRY VERY HARD TO KEEP YOUR EXPENSES AS LOW AS POSSIBLE”

The Rev. Matthew Baker

Healthy Pastors, Healthy Congregations offered Baker, then pastor of a small congregation in central North Carolina, a \$10,000 grant that he could use to pay down personal debt or to save for retirement. The program also provided personal financial counseling and a course focused on church finances and congregational leadership.

“My wife and I had two young children and two car payments. We used the money from the Healthy Pastors program to help pay off one of the vehicles and lowered our monthly debt,” Baker says. “That was just a phenomenal help to my family and to my ability to lead as a pastor.”

Baker was one of more than 944 pastors in the Presbyterian Church (U.S.A.)—PC(USA)—who participated in Healthy Pastors, Healthy Congregations between 2016 and 2022. The program provided more than \$8.3 million in direct aid to pastors, thanks in part to funding and encouragement from Lilly Endowment’s National Initiative to Address Economic Challenges Facing Pastoral Leaders (National Initiative).

The Endowment designed the initiative to help church-related institutions—especially denominational judicatories, foundations and pension and benefits boards—understand the financial pressures their pastors face and develop approaches to help pastors address those challenges so that they are better able to lead their congregations effectively and to continue their call to serve God. Through several

rounds of grantmaking in the National Initiative, the Endowment made planning and implementation grants to organizations to assist them in designing and launching programs for pastors. After their programs demonstrated their effectiveness, many participating organizations received additional grants to sustain and extend the reach of programs.

Time to dream and learn

When the initiative began in 2015, planning grants helped 22 church-related organizations to engage in research to learn more about the most pressing financial challenges faced by pastors and their families and then to consider strategies to help pastors address them. That’s how PC(USA)’s Board of Pensions worked to identify financial stressors experienced by their pastors and began to design Healthy Pastors, Healthy Congregations.

“We were not previously aware of the scope of the issue, that so many pastors were struggling with debt,” says Andy Browne, senior vice president of Church Engagement for the Board of Pensions, who oversaw Healthy Pastors, Healthy Congregations from 2016 through 2021.

Like many other organizations participating in the Endowment’s National Initiative, the Board of Pensions heard stories from pastors who carried excessive student loan debt from seminary or even undergraduate education for decades into their careers. They learned about midcareer pastors struggling with financial challenges as they raised families and older pastors worried about underfunded retirement savings. Pastors at all stages of life reported being unable to meet financial emergencies, such as unexpected medical bills.

The Endowment planning grant offered “time to dream about what we could do,” Browne says. “With time for planning, we were able to think much bigger.”

Understanding the unique financial stressors of pastors

In 2016, Baker had been ordained for just a few years and was serving his first congregation at Macedonia Presbyterian Church in Candor, a small town 80 miles east of Charlotte. Money was very tight as Baker and his wife were starting a family on a single income.

“You just cannot live on one pastor’s income and be in the middle class, even if you try very hard to keep your expenses as low as possible,” says Baker.

The relationship between money and congregations and their pastors can be tricky—and always humbling, Baker says. “Every Sunday, you pass the plate around and in the back of your mind, you think about the fact that the money collected is part of what helps put food on our table at home,” he says.

Pastors and church leaders recognize that many Americans share similar financial stressors. Yet pastors’ circumstances are unique in some ways. Often they invest in higher-than-average levels of education—doctoral degrees are common—but earnings rarely come close to those of professions with similar degree requirements. Most U.S. pastors are not mega-church ministers but are more likely to serve small- and medium-sized congregations that typically pay modest salaries, with equally modest or even non-existent employee benefits.

Pastors also are assumed to be answering a call from God and to “be in the world, but not of the world.” It can be difficult to have honest conversations within the church about compensation and the financial challenges that pastors face. While many pastors struggle with

their own finances, they are expected to teach about Christian stewardship and generosity and to lead congregational fundraising campaigns.

Leaders of PC(USA)’s Board of Pensions recognized that these circumstances generated tensions for pastors about their own finances. “To borrow language from the Endowment’s initiative, there is a culture of shame and blame around debt for too many of our ministers,” Browne says. “They had internalized the issue of debt and did not talk about it, until someone asked.”

Congregations, including First Presbyterian Church, Rocky Mount, N.C., are stronger when pastors have financial stability.





From planning to pilot program

Drawing on insights from the planning process, the Board of Pensions started small. It identified North Carolina as the best location to launch a pilot project with the support of a \$1 million implementation grant. For the pilot, it selected five areas—called presbyteries—that included large and small congregations in both rural and urban settings that reflected the diversity of Black, white and Hispanic members.

The board then adopted a dual action plan. It offered pastors direct aid and support to improve their financial well-being; and it approached congregational lay leaders with information about why their pastors struggle financially and what role the church can play in understanding and alleviating financial pain.

At first, pastors were slow to sign up, even with the offer of \$10,000 in debt relief or support for their retirement savings. But as word of the program spread and Healthy Pastors, Healthy Congregations built credibility, “it snowballed,” Browne says.

Leaders of the pilot project benefited from participation in annual gatherings that brought together grantees in the National Initiative to exchange insights. At a first year gathering, the Board of Pensions learned from a Catholic diocese about Ernst & Young Employee Financial Services. Through engagement with services like these, Healthy Pastors, Healthy Congregations clergy could receive online financial education and personal financial counseling.

“That was a game changer,” Browne says. “It is an example of how it really mattered to have a new set of colleagues doing the same kind of work.”

For pastors to qualify for direct aid, leaders from their congregations needed to be involved in the educational programming with their pastors. Congregations were also asked to make financial contributions to Healthy Pastors, Healthy Congregations. During the past seven years, more than 4,000 PC(USA) pastors and congregational leaders have participated in program activities, which were guided by scripture—Micah 6:8: “He has shown you, O mortal, what is good. And what does the Lord require of you? To act justly and love mercy and walk humbly with your God.”



“We wanted congregational leadership to really consider what it means to be a just and merciful employer, as well as understand the call of their pastors and the financial realities of that call,” Browne says.

Reaching more pastors, building momentum

The pilot’s success in North Carolina led the Endowment to award PC(USA)’s Board of Pensions a second \$1 million grant in 2018 to expand the program nationally. The board also invested \$4 million from other sources to expand its Ministerial Excellence Fund, which provided direct financial aid to clergy to pay down educational debt, establish savings plans for the educational needs of their children, and incentivize pastors’ full participation in PC(USA) pension programs.

According to the Board of Pensions, Healthy Pastors, Healthy Congregations has changed how the denomination approaches the topic of ministry and money, and it has evolved into two separate programs:

- **The Minister Debt Relief program, which the board supports fully through its own resources, continues to provide grants to alleviate pastors’ debts and provide personal and congregational financial education.**
- **The Minister Educational Debt Assistance program, which is being supported by an additional 2021 Endowment grant to extend the reach of its support of pastors, focuses on the seminary and undergraduate student debt of pastors who receive modest compensations from their congregations.**

Ruth Adams, who directs the assistance program at the Board of Pensions, says that the organization continues to draw on the lessons learned through all phases of the grant funding process. For example, language and cultural barriers made it difficult for Korean and Spanish-speaking pastors to fully access the debt relief and financial education resources. In the last three years of the program, the Board of Pensions has taken steps to remove those barriers and make it more inclusive, according to Adams.

“That was the ongoing gift of the planning grant, that each year that we ran this program, we made it better,” she says. “It really changed the conversation at the Board of Pensions and how we approach financial health and wellness for our pastors, who are able to see some light at the end of the tunnel and can focus on ministry. Our congregations have a happier, healthier pastor.”

Baker, who is now pastor of First Presbyterian Church of Rocky Mount, North Carolina, says Healthy Pastors, Healthy Congregations provided a lifeline when he needed it and the tools to plan for a financial future. But it also had a positive influence on his life as a pastor. Educational workshops within his congregation helped lay leaders learn about pastor compensation, how tax law affects clergy,

and the importance of healthy communication between pastors and the lay people who help run congregations. Baker says, “It changed the way we talked about clergy compensation for the better.”

Although money is still sometimes tight for his family, his experience with Healthy Pastors, Healthy Congregations affirmed Baker’s calling to congregational ministry.

“I do enjoy being a Presbyterian minister, and I really can’t imagine doing anything else,” he says. “I’ve always felt seen and loved by my denomination, but this is one of the most concrete examples of that love.”

AT A GLANCE

National Initiative to Address Economic Challenges Facing Pastoral Leaders

Through the National Initiative to Address Economic Challenges Facing Pastoral Leaders, Lilly Endowment has made grants to 53 organizations to support efforts to reduce or alleviate some of the key financial pressures that impair the abilities of pastors to lead congregations effectively. The organizations also guide pastors through wide-ranging educational programs to improve financial literacy and management skills.

Grantees under the initiative developed programs that, among other things, encourage pastors and their spouses to participate in educational events related to personal finance; offer low- to no-cost professional financial planning and counseling; provide matching contributions for pastors to enroll in retirement savings programs; develop programs to help young pastors pay down or eliminate educational debt; create new scholarship funds so that seminarians borrow less while in school, and raise awareness in congregations of the compelling financial challenges many pastors face.

The organizations include a variety of church-related institutions, among them denominational pension and benefits boards; local and regional denomination judicatories, such as synods and dioceses; and denominational foundations. Additionally, the Endowment has made grants to seven organizations that are providing research, networking and other resources to grantees working to address the economic challenges that pastors face.

Since 2015, the Endowment has approved a total of \$116 million in grants to help organizations plan, implement, sustain and extend their programs and to provide research and networking support to the organizations.

The Baker family (opposite); and a gathering of grantees in the National Initiative to Address Economic Challenges Facing Pastoral Leaders.

Planning Grant Lifts Network ‘Off the Dance Floor’ for New Perspective

Tales of thriving congregations

St. Mark’s United Methodist Church in Goshen, Ind., is thriving.

Nearly a century old, St. Mark’s hulking brick building is located on a busy street in Goshen, a northern Indiana town with an ethnically diverse population of approximately 32,000 people. The church anchors Chamberlain, a neighborhood with an equally aged school, modest homes, a family-owned Mexican restaurant and a small park shaded by mature trees.

Just around the corner is the Elkhart County Work Release Center. Shannan Martin, who lives down the street, points to its presence as the unlikely source of revival at St. Mark’s. Ten years ago, she and her family moved to the neighborhood and joined the church. They wanted to live more intentionally as neighbors in what she describes as “an overlooked” pocket of Goshen.

St. Mark’s developed a partnership with the work release program, which has blessed the congregation, according to Martin. She tells the story of a longtime parishioner, a woman in her 90s, and a younger woman in the county work-release program. On Sundays, they worship from the same pew and sometimes share a hymnal. When the older woman learned that her friend was about to move to a new apartment, she wanted to buy a few household items to support the young woman as she seeks a fresh start. It’s one example of the congregation’s neighborhood focus and its emphasis on human relationships.

“St. Mark’s is a vibrant and honest presence, a place of hope and harbor for my family and our community,” she says. “I believe this is what the future of the healthy church looks like.”

Two thousand miles away in the San Diego neighborhood of Golden Hill, Christiana Rice feels a similar movement stirring. She and her family are part of a non-denominational home church network.

Shannan Martin outside of St. Mark’s United Methodist Church in Goshen, Ind.



Rice strives to live the Christian faith in daily life and on her street—a place where the wealthy and the poor live together amid skyrocketing home prices and homelessness. That means sharing meals and scripture study with people who live close to her house and offering a listening ear to neighbors and others.

A few years ago, Rice reached out by email to her neighborhood faith community during a moment of intense personal grief. She was soon surrounded by neighbors who walked to her home willing to grieve with her. Rice believes such moments are the expression of a community centered on the love of God.

“Our communal call is to discover the sacred in our ordinary lives,” she says.

Martin and Rice live far from one another, but their congregations are connected through the Parish Collective. It is an ecumenical network of more than 1,000 congregations across the country that are discerning a call to mission in their communities. With support through Lilly Endowment’s Thriving Congregations Initiative, Parish Collective is expanding its national network to provide resources and support to congregations as they seek to strengthen ministries that foster relationships and service in their neighborhoods. It does this by connecting congregations through regional learning communities and national conferences and by providing individualized coaching to pastors and lay leaders.

Engaging in local place-based ministry

“Our definition is that church plus neighborhood equals parish,” says Tim Soerens, Parish Collective’s co-founder and executive director. “Parish Collective invites people to understand the importance of parish, that the church is meant to embody the gospel of the kingdom of God in Christ through practice and presence in a particular place, so that the people in that place know that God is concerned about their specific needs, gifts, concerns and well-being.”

The word “parish” has deep roots in Roman Catholic and Anglican traditions. Historically, those Christian communities have defined parishes as places that have social and theological connections within a specific geographic area, such as a neighborhood. It’s a concept that inspires Parish Collective’s vision.

Soerens lives parish life in the diverse, urban South Park neighborhood of Seattle, where he is co-founder of Resistencia Coffee, a neighborhood coffee shop, as well as the South Park Idea Lab. He is author of *Everywhere You Look: Discovering the Church, Right Where You Are* (2020).

Balcony time

In 2019, Parish Collective had been helping congregations understand and integrate the parish model into their missions for almost a decade when it received a \$48,855 planning grant through Thriving Congregations.

Launched in 2019, Thriving Congregations seeks to encourage congregations to strengthen ministries that help people deepen their relationship with God, enhance their connections with each other and contribute to the flourishing of their communities.

At that time, Parish Collective was facing a pressing challenge of rapid growth. The increasing number of congregations seeking out the Seattle-based organization to help them reimagine and strengthen their neighborhood-based ministries was outstripping its capacity to respond. The requests also caused Parish Collective to wonder whether its mission and its strategies for working with congregations should be evaluated.

According to Soerens, the planning grant helped the organization clarify its mission and gain a new perspective on how to engage congregations as they explored how God may be at work in their neighborhoods.

Parish Collective used planning funds to conduct an extensive campaign to listen to ordained and lay leaders across three diverse geographic areas—Pacific Northwest (Portland and Seattle), California (San Diego and LA) and Chicago—to understand more fully the challenges and opportunities of congregations and their neighborhoods.

“To borrow from the leadership author Ronald Heifetz, the planning grant enabled us, in part, to ‘get off the dance floor’ of the day-to-day running of the organization. It gave us an opportunity to see what’s happening from the ‘balcony,’” Soerens says. “Setting aside time to listen to answers to the same set of questions across a broad cross section of leaders, neighborhoods and cultures helped us sharpen our mission and craft a thoughtful four-year plan. It was a timely gift for our organization.”

The Endowment planning grant also helped the organization prepare a proposal for a \$700,972 implementation grant, which the Endowment approved later in 2019. Those funds are enabling Parish Collective to scale up its network by developing new congregational learning communities in 12 cities across the country.

“Most congregations going down this path have stopped putting their primary energy into trying to attract people into pews. Instead, they are curious and ready to discern what activity God is up to in their area as well as the challenges and opportunities at the intersection of the life of their neighborhood and the life of their congregation,” Soerens says. “We even developed an online quiz, ‘Five Signs of the Parish Movement,’ on our website to help congregations discern where they are in becoming a parish-minded church.”

Congregations today face many challenges, including those created and accelerated by the COVID-19 pandemic and the impact of demographic shifts and new technologies. The Endowment designed Thriving Congregations to help organizations—colleges and universities, theological schools, denominational agencies, individual congregations, and other faith-based organizations—understand more deeply the rapid social and cultural changes affecting congregations and support them as they adapt ministries to address these challenges.



Grantees funded through Thriving Congregations could tell similar stories about their efforts to come alongside congregations and help them adapt and strengthen their ministries, according to David Odom, executive director of leadership education at Duke Divinity. Organizations need validation that their innovative approaches are important and worthy of investment. Parish Collective’s approach is innovative and at the same time rooted in Christian tradition.

“Bringing back the idea of a parish is a kind of reformation for some congregations,” Odom says. “It’s a new expression of a very old idea. The people who do this are deeply interested in the health, welfare, and economics of their neighborhood. It’s a very Christian way to live.”

Expanding a national network

While Parish Collective provides support and a blueprint for place-based mission, the network also helps like-minded congregations and lay people connect with each other, according to Rice. In addition to her efforts in San Diego, she is Parish Collective’s associate director and director of its national and regional meetings.

“People are craving support as they work to figure out what the role of the church will be, given the everyday realities of where we are today,” she says.

It was through Parish Collective’s networking that St. Mark’s Martin became a featured speaker at its gatherings. At one of those events, she met Jonathan Brooks, Parish Collective’s board chair and co-pastor of Lawndale Christian Community Church near Chicago. They learned they were both finding encouragement in Jeremiah 29:7. It was calling them to “work for the good of the city.”

“We didn’t know each other, but we were latching on to the same verse,” Martin says. “Parish Collective has given color, context and shape to what I have been learning—and living. I want to keep moving forward with people who hold on to hope by living faithfully with the parish mentality at the heart of all we do.”

In bringing together Christian believers from a diverse array of congregations who are choosing to grow together, Parish Collective represents a new kind of “catalytic organization,” Odom says. The ecumenical network relies on gathering members for learning and support. But this approach has been difficult to sustain at a time when finances are stretched thin due to the pandemic and inflationary costs of travel. The Endowment’s implementation grant is helping Parish Collective fund the cost of conferences and travel and helping it develop and test revenue streams to sustain its efforts after the grant.



Congregations in San Diego County sponsor neighborhood dinners (opposite); Christiana Rice and Tim Soerens, Parish Collective leaders; and a regional gathering of the organization in southern California (above).



Thriving Congregations Initiative

Through the Thriving Congregations Initiative, Lilly Endowment aims to help congregations strengthen their ministries to help people deepen their relationships with God, enhance their connections with each other, and contribute to the flourishing of their communities and the world.

Through the initiative, the Endowment has made grants to 114 organizations that represent a broad spectrum of Christian traditions and include colleges and universities, ecumenical networks, denominational agencies, individual congregations and other faith-based institutions.

The organizations are working with congregations that have a wide variety of ministry contexts and individuals and families from diverse backgrounds. Their Thriving Congregations programs are, among other things, helping congregations understand and respond to the rapid social and technological changes affecting their ministries; extending the reach of their ministries through practices of hospitality and the use of new technologies to enhance worship; supporting and nurturing better the religious lives of young people; and developing ministries that connect more deeply with the increasingly diverse neighborhoods, towns and cities in which they serve.

In 2019 and 2020, the Endowment made grants through its first and second round of Thriving Congregations. In January 2023, the Endowment opened a third round of the initiative, and it expects to award up to 60 grants by the end of the year.

Asking ‘God questions’

One of Parish Collective’s primary objectives is to encourage listening, Soerens says. What he hears is that the future of the American church feels “up for grabs,” and that constant talk of decline leads to grief and increasing anxiety.

“That was true even before the COVID pandemic,” Soerens says. “It’s difficult to see church growth in such circumstances, and therefore it’s completely understandable for congregations to ask ‘church’ questions: ‘How do I grow my church, how do I survive?’”

Parish Collective did not ask those questions in its planning phase. It’s not trying to do so now.

“Those questions point back to us, not to God,” Soerens says. “I hope Parish Collective can help point congregations toward ‘God’ questions, as in ‘God, what are you doing in *this* place, how can I follow you?’ I am convinced that God is renewing and restoring the local church in neighborhoods.

“We believe that when we organize the church around God’s dreams for our neighborhoods, there is nothing in the world that cannot be healed, transformed, and liberated.”

National and regional gatherings, including one called Inhabit (above), are essential to the work of Parish Collective.

Finances & Grantmaking

During 2022 Lilly Endowment paid \$1.310 billion in grants and approved \$1.298 billion in new grants.

Cumulative figures

Since its founding in 1937, the Endowment through the generosity of its founders has disbursed \$13.7 billion in grants to 10,722 charitable organizations, most of them in Indiana. Of that \$13.7 billion, \$5.0 billion supported education (37 percent), \$4.8 billion supported community development (35 percent), and \$3.9 billion supported religion (28 percent). At the end of 2022, the Endowment's assets totaled \$40.8 billion.

Grants paid

In 2022 the Endowment paid grants totaling \$1.310 billion. **Religion grants** accounted for \$498 million or 38 percent of the total; **education grants** accounted for \$411 million or 31 percent; and **community development grants** accounted for \$401 million or 31 percent.

As in previous years, most of the grants paid in 2022 (\$729 million or 56 percent) supported charitable efforts in Indiana. Grants totaling \$429 million (33 percent) supported Indiana charitable efforts outside of Marion County (Indianapolis), and \$300 million (23 percent) supported charitable efforts inside the county. Remaining grants paid in 2022 totaling \$581 million (44 percent) supported charitable efforts outside Indiana, most of which were religion grants.

Grants approved

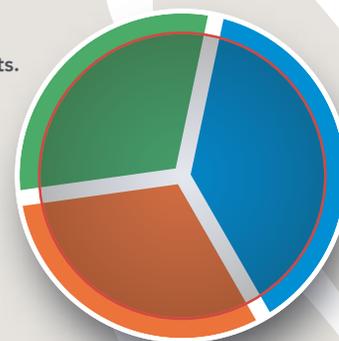
During 2022 the Endowment approved 965 grants for a total of \$1.298 billion to 645 grantees, 150 new to the Endowment.

Grants in religion of \$512 million were approved during the year, or 39 percent of the grants approved total. Approvals for **education grants** totaled \$424 million or 33 percent, while approvals for **community development grants** totaled \$362 million or 28 percent.

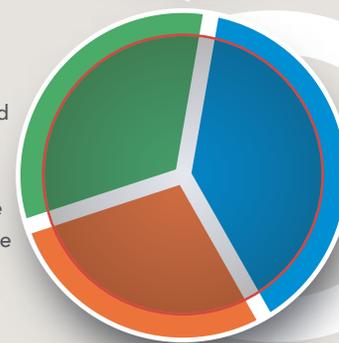
Fifty-four percent of grants approved in 2022 was to support charitable efforts in Indiana. Specifically, of the \$1.298 billion in grants approved, \$436 million (34 percent) was approved for charitable efforts in Indiana outside of Marion County (Indianapolis) and \$265 million (20 percent) was designated for charitable efforts inside the county. The balance of \$597 million (46 percent) was approved for charitable efforts outside Indiana.

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

The Endowment's match for the charitable contributions of staff, retirees and Board members is reported as a single line item before the total of all grants approved. "Grant Guidelines & Procedures" are outlined on pages 60-61 of this report.



GRANTS PAID



GRANTS APPROVED



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Report of Independent Auditors

The Board of Directors
Lilly Endowment Inc.

Opinion

We have audited the financial statements of Lilly Endowment Inc. (the Endowment), which comprise the statements of financial position as of December 31, 2022 and 2021, and the related statements of activities and cash flows for the years then ended, and the related notes (collectively referred to as the “financial statements”).

In our opinion, the accompanying financial statements present fairly, in all material respects, the financial position of the Endowment at December 31, 2022 and 2021, and the changes in its net assets and its cash flows for the years then ended in accordance with accounting principles generally accepted in the United States of America.

Basis for Opinion

We conducted our audits in accordance with auditing standards generally accepted in the United States of America (GAAS). Our responsibilities under those standards are further described in the Auditor’s Responsibilities for the Audit of the Financial Statements section of our report. We are required to be independent of the Endowment and to meet our other ethical responsibilities in accordance with the relevant ethical requirements relating to our audits. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Responsibilities of Management for the Financial Statements

Management is responsible for the preparation and fair presentation of the financial statements in accordance with accounting principles generally accepted in the United States of America, and for 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.

In preparing the financial statements, management is required to evaluate whether there are conditions or events, considered in the aggregate, that raise substantial doubt about the Endowment’s ability to continue as a going concern for one year after the date that the financial statements are available to be issued.

Auditor’s Responsibilities for the Audit of the Financial Statements

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free of material misstatement, whether due to fraud or error, and to issue an auditor’s report that includes our opinion. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with GAAS will always detect a material misstatement when it exists. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control.



Misstatements are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment made by a reasonable user based on the financial statements.

In performing an audit in accordance with GAAS, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the amounts and disclosures in the financial statements.
- Obtain an understanding of internal control relevant to the audit 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 Endowment's internal control. Accordingly, no such opinion is expressed.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the financial statements.
- Conclude whether, in our judgment, there are conditions or events, considered in the aggregate, that raise substantial doubt about the Endowment's ability to continue as a going concern for a reasonable period of time.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit, significant audit findings, and certain internal control-related matters that we identified during the audit.

Ernst + Young LLP

March 16, 2023

Statements of Financial Position

As of December 31	2022	2021
Assets		
Cash and cash equivalents	\$ 110,729,401	\$ 108,825,237
Investments—at fair value:		
United States government and agency, bank, and corporate interest-bearing obligations	1,096,249,000	744,666,483
Eli Lilly and Company common stock (cost—\$80,205,370 at December 31, 2022 and \$80,839,116 at December 31, 2021)	37,662,792,650	29,683,653,598
Diversified equity investments	1,928,651,392	2,222,105,020
Other assets	3,009,755	5,175,612
	<u>\$ 40,801,432,198</u>	<u>\$ 32,764,425,950</u>
Liabilities		
Grants payable	\$ 40,575,526	\$ 69,687,192
Federal excise tax payable	—	860,582
Deferred tax liability	525,965,095	421,822,284
	<u>566,540,621</u>	<u>492,370,058</u>
Net assets without donor restrictions	40,234,891,577	32,272,055,892
	<u>\$ 40,801,432,198</u>	<u>\$ 32,764,425,950</u>

See accompanying notes.

Statements of Activities

Year Ended December 31	2022	2021
Income:		
Dividends	\$ 452,695,016	\$ 411,369,784
Interest	12,713,914	781,152
Total income	<u>465,408,930</u>	<u>412,150,936</u>
Expenses:		
Program grants approved	1,284,601,576	634,090,296
Program support	11,661,565	10,612,319
Operational support	7,249,877	6,976,895
Current federal excise tax	26,394,294	18,246,582
Deferred federal excise tax	104,142,811	155,749,562
Total expenses	<u>1,434,050,123</u>	<u>825,675,654</u>
Investment return and other income:		
Realized gain on sale of investments	1,448,262,109	913,013,246
Unrealized gain on investments	7,483,715,582	11,193,959,526
Other income (loss)	(500,813)	322,498
Total investment return and other income	<u>8,931,476,878</u>	<u>12,107,295,270</u>
Increase in net assets without donor restrictions	7,962,835,685	11,693,770,552
Net assets without donor restrictions:		
Balance at beginning of year	32,272,055,892	20,578,285,340
Balance at end of year	<u>\$ 40,234,891,577</u>	<u>\$ 32,272,055,892</u>

See accompanying notes.

Statements of Cash Flows

Year Ended December 31	2022	2021
Operating activities		
Increase in net assets	\$ 7,962,835,685	\$ 11,693,770,552
Adjustments to reconcile change in net assets to net cash used in operating activities:		
Investment expenses	526,025	426,739
Unrealized gain on investments	(7,483,715,582)	(11,193,959,526)
Realized gain on sale of investments	(1,448,262,109)	(913,013,246)
Changes in assets and liabilities:		
Other assets	2,165,857	24,561
Grants payable	(29,111,666)	(93,233,274)
Federal excise tax payable	(860,582)	860,582
Deferred tax liability	104,142,811	155,749,562
Net cash used in operating activities	(892,279,561)	(349,374,050)
Investing activities		
Purchases of investments	(2,014,296,050)	(1,478,957,356)
Proceeds from sale and maturity of investments	2,909,005,800	1,744,870,451
Investment expenses	(526,025)	(426,739)
Net cash provided by investing activities	894,183,725	265,486,356
Net increase (decrease) in cash and cash equivalents	1,904,164	(83,887,694)
Cash and cash equivalents at beginning of year	108,825,237	192,712,931
Cash and cash equivalents at end of year	\$ 110,729,401	\$ 108,825,237

See accompanying notes.

Notes to Financial Statements

December 31, 2022

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 16, 2023, 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 fair value. Changes in fair value are recorded in the statements of activities.

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 2022 and 2021 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, 2022, are expected to be paid to grantees as follows: \$39,425,526 in 2023 and \$1,150,000 in 2024.

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 \$1.423 billion, before January 1, 2024, to meet the 2022 minimum distribution requirements.

3. 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, 2022 and 2021.

Description	Quoted Prices in Active Markets for Identical Assets (Level 1)	Observable Inputs (Level 2)	Unobservable Inputs (Level 3)	Fair Value (Carrying Value)
December 31, 2022				
Cash equivalents	\$ 84,489,353	\$ –	\$ –	\$ 84,489,353
Fixed income securities	–	1,096,249,000	–	1,096,249,000
Marketable securities	39,591,444,042	–	–	39,591,444,042
	39,675,933,395	1,096,249,000	–	40,772,182,395
Other assets	–	–	2,954,049	2,954,049
	<u>\$ 39,675,933,395</u>	<u>\$ 1,096,249,000</u>	<u>\$ 2,954,049</u>	<u>\$ 40,775,136,444</u>
December 31, 2021				
Cash equivalents	\$ 79,984,575	\$ –	\$ –	\$ 79,984,575
Fixed income securities	–	744,666,483	–	744,666,483
Marketable securities	31,905,758,618	–	–	31,905,758,618
	31,985,743,193	744,666,483	–	32,730,409,676
Other assets	–	–	3,995,187	3,995,187
	<u>\$ 31,985,743,193</u>	<u>\$ 744,666,483</u>	<u>\$ 3,995,187</u>	<u>\$ 32,734,404,863</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, 2022 and 2021.

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 assets include a split-interest agreement 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.

4. Liquidity and Availability

None of the financial assets as listed on the statements of financial position 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.

5. Federal Excise Taxes

During 2022 and 2021, the Endowment was subject to federal excise taxes imposed on private foundations at 1.39%. 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. Current federal excise tax expense on realized amounts was \$26,394,294 and \$18,246,582 for the years ended December 31, 2022 and 2021, respectively. The Endowment made estimated excise tax payments totaling \$26,450,000 and \$17,386,000 during 2022 and 2021, respectively. Due to estimated tax overpayments during 2022, the Endowment recorded a receivable of \$55,706 at December 31, 2022, within other assets in the statements of financial position. Due to estimated tax underpayments during 2021, the Endowment recorded a federal excise tax payable of \$860,582 at December 31, 2021, in the statements of financial position.

The deferred tax liability relates to deferred federal excise taxes on unrealized gains of investments.

The Endowment is subject to routine audits by taxing jurisdictions. The Endowment believes it is no longer subject to income tax examinations for years prior to 2019 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

2021





Community Development Grants

Dollar amount approved in 2022

American Cabaret Theatre

Indianapolis, IN

General operating support 150,000

American Enterprise Institute for Public Policy Research

Washington, DC

General operating support 100,000

Arts Council of Indianapolis

Indianapolis, IN

Art & Soul at the Artsgarden 52,000

General operating support 300,000

Arts for Lawrence

Lawrence, IN

Support for leadership transition 18,750

Arts for Learning

Indianapolis, IN

Fundraising capacity building 50,000

General operating support 200,000

Athenaeum Foundation

Indianapolis, IN

Campaign feasibility study 25,000

Atlas Economic Research Foundation

Arlington, VA

General operating support 500,000

Career Learning & Employment Center for Veterans

Indianapolis, IN

Continued support for Operation: Job Ready Veterans 450,000

Central Indiana Community Foundation (CICF)

Indianapolis, IN

Continued capacity building support for GANGGANG initiative 1,500,000

Support for the Connected Communities Initiative 25,000,000

Coalition for Homelessness Intervention and Prevention (CHIP)

Indianapolis, IN

General operating support 390,000

Conner Prairie Museum

Fishers, IN

Capital campaign 5,000,000

The Conversation US

Waltham, MA

The Common Ground Initiative with Associated Press 4,000,000

Crossroads Rehabilitation Center

Indianapolis, IN

Continuation of the Autism Family Support Center and related programs 750,000

Continued support for the Speech and Hearing Resource Center 838,510

Crown Hill Heritage Foundation

Indianapolis, IN

Capital campaign 2,000,000

Dance Kaleidoscope

Indianapolis, IN

General operating support 100,000

Domestic Violence Network of Greater Indianapolis

Indianapolis, IN

General operating support 300,000

Economic Club of Indiana

Indianapolis, IN

General operating support 10,000

Eiteljorg Museum of American Indians and Western Art

Indianapolis, IN

Eiteljorg Contemporary Art Fellowship and special projects 698,000

General operating support 1,147,500

Support for leadership transition 100,000

Episcopal Diocese of Indianapolis

Indianapolis, IN

Support for Urban Legacy Lands Initiative and efforts to preserve the Black heritage of Indiana Ave. 800,000

Federalist Society for Law and Public Policy Studies

Washington, DC

General operating support 150,000

Fraser Institute

Vancouver, BC

General operating support 300,000

Freedom House

Washington, DC

General operating support 100,000

George Mason University Foundation

Fairfax, VA

Operating support for Law and Economics Center judicial education programs 100,000

Gleaners Food Bank of Indiana

Indianapolis, IN

Capital campaign 5,500,000

Food relief efforts (2) 1,500,000

The Greater Indianapolis Progress Committee (GIPC)

Indianapolis, IN

Support for the Marion County Re-entry Coalition's interdisciplinary defense system pilot program 4,000,000

Harrison Center for the Arts (Harrison Center)

Indianapolis, IN

General operating support 100,000

HATCH, Inc.

Indianapolis, IN

Strategic planning 43,545

Heartland Film

Indianapolis, IN

General operating support 300,000

Historic Woodruff Place Foundation

Indianapolis, IN

Fountain restoration 50,000



**Historical Society of the United States
District Court for the Southern District
of Indiana**

Indianapolis, IN

Support for civic learning center in federal
courthouse building 20,000

**Indiana Association for Community
Economic Development
(Prosperity Indiana)**

Indianapolis, IN

General operating support 175,000

Indiana Association of United Ways

Indianapolis, IN

General operating support 1,240,000
Support for special programs 5,369,439

**Indiana Economic Development
Corporation**

Indianapolis, IN

Support for remote worker attraction program 500,000

Indiana Humanities

Indianapolis, IN

General operating support 175,000

Indiana Landmarks

Indianapolis, IN

Support to establish a Black Heritage
Preservation Program 5,000,000

Indiana National Guard Relief Fund

Indianapolis, IN

Continuing support for the Indiana National
Guard Relief Fund 231,675

Indiana Performing Arts Centre

Indianapolis, IN

Capacity building 100,000

Indiana Philanthropy Alliance

Indianapolis, IN

General operating support 300,500
Website and technology infrastructure 125,000

Indiana Philanthropy Alliance Foundation

Indianapolis, IN

Community Foundation Internship Program 1,473,160
Community foundation technical assistance 775,000



Indiana Public Broadcasting Stations

Indianapolis, IN

Continued support for IPB News statewide
journalism collaboration 1,725,000

Indiana Repertory Theatre

Indianapolis, IN

General operating support 400,000

Indiana Sports Corporation

Indianapolis, IN

General operating support 500,000

Indiana State Budget Agency

Indianapolis, IN

Support for research, convening and
internships in connection with the Office of
Equity, Inclusion and Opportunity 712,500

**Indiana Symphony Society
(Indianapolis Symphony Orchestra)**

Indianapolis, IN

General operating support 1,237,000

Indianapolis Art Center

Indianapolis, IN

General operating support 200,000

Indianapolis Children's Choir

Indianapolis, IN

General operating support 150,000

Indianapolis Jazz Foundation

Indianapolis, IN

Indy Jazz Fest 42,000

Indianapolis Museum of Art (Newfields)
Indianapolis, IN
General operating support 500,000

Indianapolis Neighborhood Housing Partnership
Indianapolis, IN
General operating support 5,300,000

Indianapolis Neighborhood Resource Center
Indianapolis, IN
General operating support 250,000

Indianapolis Opera
Indianapolis, IN
General operating support 90,000

Indianapolis Shakespeare Company
Indianapolis, IN
Production of "Ricky 3 – A Hip Hop Shakespeare Richard III" 25,000

Indianapolis Urban League
Indianapolis, IN
Support for projects to complement the Indianapolis African American Quality of Life Initiative 5,000,000

Indianapolis Zoological Society (Indianapolis Zoo)
Indianapolis, IN
General operating support 1,116,720

Indy Hub Foundation
Indianapolis, IN
Strategic planning 34,000

Intercollegiate Studies Institute
Wilmington, DE
General operating support 125,000

International Center
Indianapolis, IN
General operating support 500,000

Jewish Federation of Greater Indianapolis
Indianapolis, IN
Master planning and capital campaign feasibility study 225,000

Keep Indianapolis Beautiful
Indianapolis, IN
General operating support 325,000
Support for comprehensive litter reduction efforts 3,784,757

Local Initiatives Support Corporation (LISC)
New York, NY
Indianapolis LISC program 500,000

Madam Walker Legacy Center
Indianapolis, IN
Special programs to commemorate the reopening of the Madam Walker Theatre building 50,000

Midwest Food Bank – Indiana Division
Indianapolis, IN
Food relief efforts (2) 350,000

New Harmony Project
Indianapolis, IN
General operating support 50,000

New Hope of Indiana
Indianapolis, IN
Capacity building to address workforce challenges 35,000

Northwestern University
Evanston, IL
Support for research on communities with limited access to news 200,000

Orthopedics Capital Foundation
Warsaw, IN
Continued support for OrthoWorx 2,250,000





Pacific Research Institute for Public Policy

Pasadena, CA
General operating support 175,000

Percussive Arts Society

Indianapolis, IN
Website and content database improvements 50,000

Phoenix Theatre

Indianapolis, IN
Capital campaign 1,500,000

Political Economy Research Center

Bozeman, MT
General operating support 50,000

River West Theatre (Fonseca Theatre Company)

Indianapolis, IN
Capital campaign 150,000

Rockefeller Philanthropy Advisors / Issue One

New York, NY/ Washington, DC
Support for Partnership for American Democracy 250,000

Sagamore Institute for Policy Research

Indianapolis, IN
General operating support 300,000

Stanford University – The Hoover Institution

Stanford, CA
General operating support 125,000

Steward Speakers

Indianapolis, IN
Support for lecture series 50,000

Storytelling Arts of Indiana

Indianapolis, IN
Capacity building 11,600

Summer Stock Stage

Indianapolis, IN
Technology upgrades 25,000

Tax Foundation

Washington, DC
General operating support 110,000

Tourism Tomorrow

Indianapolis, IN
Support for Belmont Beach and master planning for Haughville’s riverfront 400,000

United Way of Central Indiana

Indianapolis, IN
Capital Projects Fund 5,618,000
Facilities Maintenance Fund 1,900,000
Support for 2022 annual fundraising 4,300,000

University of Southern Indiana

Evansville, IN
General operating support for Historic New Harmony project 125,000

Women4Change

Indianapolis, IN
Civic Education Conference 10,000

Disaster Response Capacity Building

Grants to strengthen strategic and organizational capacity to respond to increasingly large and more frequent natural disasters that are influenced by climate change

American Red Cross Washington, DC	40,000,000
The Salvation Army National Corporation Alexandria, VA	40,000,000

Holiday Assistance Fund

Grants to central Indiana organizations to support their holiday assistance efforts in Indianapolis (Marion County)
(36 grants ranging from \$2,500 to \$275,600) 750,000

- Barnes United Methodist Church
- Brookside Community Church of Indianapolis
- Catholic Charities Indianapolis
- Christ Emmanuel Missionary Baptist Church
- Community Action of Greater Indianapolis
- Concord Center Association
- East Tenth United Methodist Children and Youth Center
- Ebenezer Baptist Church
- Flanner House
- Friends Ministries (Iglesia Amigos)
- Gleaners Food Bank of Indiana
- Hall Temple Church of God in Christ
- HOPE Project
- The Hovey Church of Christ of Indianapolis, Ind., Inc.
- Iglesia Ebenezer Inc.
- Indiana F.O.P. Foundation
- Indianapolis First Church of the Nazarene
- Indianapolis Foursquare Church



- Indianapolis Urban League
- Insight Development Corp.
- Kingdom Apostolic Ministries International (KAM)
- 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
- Old Bethel United Methodist Church
- Power of the Blood Ministries
- Rev. Richard Hunter Ministries
- Roberts Park United Methodist Church
- Salvation Army Indiana Division
- Southeast Community Services
- University United Methodist Church
- Westminster Neighborhood Services

Human Services Special Capacity Building Support

Three-year grants to help human services organizations in Indianapolis strengthen their capacity-building efforts. The organizations are community centers working to help comprehensively individuals and families; organizations that serve individuals experiencing homelessness, survivors of domestic violence and other highly vulnerable populations; and organizations that assist immigrants and refugees.

(28 grants ranging from \$200,000 to \$4,000,000) 41,026,000

- Catholic Charities Indianapolis
- Christamore House
- Coburn Place Safe Haven
- Community Alliance of the Far Eastside (CAFE)
- Concord Center Association
- Damien Center
- Dayspring Center
- Dove Recovery House for Women
- Edna Martin Christian Center
- Exodus Refugee Immigration
- Fay Bickard Glick Neighborhood Center at Crooked Creek
- Firefly Children & Family Alliance
- Flanner House
- Hawthorne Social Service Association
- HealthNet, Inc.
- Hoosier Veteran Assistance Fund
- Horizon House
- Immigrant Welcome Center
- John H. Boner Community Center
(John Boner Neighborhood Centers)



Julian Center
 La Plaza
 Martin Luther King Multi Service Center (MLK Center)
 Mary Rigg Neighborhood Center
 Salvation Army Indiana Division
 Shepherd Community
 Southeast Community Services
 Volunteers of America Ohio & Indiana
 Wheeler Mission Ministries

Indianapolis Parks Improvements

Support for improvements in 42 parks spanning all nine townships in Indianapolis (Marion County) and to strengthen community engagement efforts. Grants include funding for the City of Indianapolis and for support organizations serving three of Indianapolis' largest historic parks.

Eagle Creek Park Foundation	2,600,000
Friends of Garfield Park	2,500,000
Friends of Holliday Park	3,000,000
Indianapolis Department of Parks and Recreation (2)	71,900,000

Philanthropy

Candid, New York, NY (2)	158,201
Council on Foundations, Washington, DC	44,000
Independent Sector, Washington, DC	17,500
Philanthropy Roundtable, Washington, DC	100,000

Pilot Community Violence Intervention Grants

Support for efforts to help mitigate gun violence in Indianapolis (13 grants ranging from \$50,000 to \$500,000) 3,000,000

Brookside Community Development Corporation

Community Action of Greater Indianapolis
 Eclectic Soul VOICES Corporation
 Edna Martin Christian Center
 Emmanuel Baptist Church
 Eskenazi Health Foundation
 EVOLVE
 Flanner House
 New Direction Christian Church, Inc.
 Public Advocates in Community Re-entry (PACE, Inc.)
 Stop the Violence Indianapolis
 Ten Point Coalition of Indianapolis
 Workforce Inc. (RecycleForce)

Social Services Sustainability

Support to social services organizations in Indianapolis to help bolster their long-term sustainability plans. The organizations include community centers and organizations that serve seniors and their families, LGBTQ+ youth and young adults, individuals transitioning from the foster care system, individuals who are affected by substance use disorders, individuals living with HIV/AIDS, and individuals transitioning from incarceration.

(10 grants ranging from \$1,000,000 to \$5,000,000) 44,000,000

CICOA
 Damien Center
 Dove Recovery House for Women
 Fay Biccard Glick Neighborhood Center at Crooked Creek
 Foster Success (Indiana Connected by 25, Inc.)
 Indiana Youth Group
 Martin Luther King Multi Service Center (MLK Center)
 Public Advocates in Community Re-entry (PACE, Inc.)
 Volunteers of America Ohio & Indiana
 Workforce Inc. (RecycleForce)

Subtotal

Community Development Division Grants	362,030,357
Community Development Division Discretionary Grants	56,500

Total

Community Development Division Grants	362,086,857
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Education Division Grants

Dollar amount approved in 2022

American Indian College Fund
 Denver, CO
 Improving educational attainment and career readiness for students at tribal colleges and universities 38,775,000

Chalkbeat
 New York, NY
 Continued support for Indiana education news service 200,000

DePauw University
 Greencastle, IN
 Funding to host a symposium for Indiana colleges and universities to discuss freedom of expression 50,000

Early Learning Indiana
 Indianapolis, IN
 Statewide initiative to support proven and promising programs for very young children (birth through age 3), with a focus on children from low-income households, children from communities of color and children who are multi-language learners 55,000,000
 Strengthening the capacity and quality of Indiana early learning programs 12,000,000

Goodwill of Central and Southern Indiana
 Indianapolis, IN
 Improving access to careers in information technology 2,800,000

Grantmakers for Education
 Portland, OR
 2022 membership dues and Out-of-School Time Impact Group support 20,700

Independent Colleges of Indiana
 Indianapolis, IN
 Administration of the Lilly Endowment Community Scholarship Program 2023/2024 1,813,720
 Continued support for Realizing the Dream 587,000
 Lilly Endowment Community Scholarship Program for 2024 18,887,905

Indiana Campus Compact (Community-Engaged Alliance)
 Indianapolis, IN
 Campus community engagement programs 675,000

Indiana Humanities
 Indianapolis, IN
 Lilly Scholars Network project 2,819,665

Indiana State University
 Terre Haute, IN
 Extending Teacher Creativity 2023: A Summer Workshop for Teacher Creativity Fellows 118,880

Indiana Student Financial Aid Association
 Carmel, IN
 College Goal Sunday 2023 events 50,000

Indiana Youth Institute

Indianapolis, IN

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

Indianapolis, IN

2022 College Fair events	15,000
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Ivy Tech Foundation

Indianapolis, IN

Planning for program to strengthen the early learning workforce in Indiana	250,000
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The Mind Trust

Indianapolis, IN

Continued support for Teach For America (Indianapolis) and Indianapolis Teaching Fellows	3,075,000
Indianapolis parent engagement programs	635,000
Support the Educational Excellence Awards Gala	10,000

Private Academic Library Network of Indiana (PALNI)

Indianapolis, IN

Additional support for affordable online textbooks program	275,000
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Rose-Hulman Institute of Technology

Terre Haute, IN

Continuation of AskRose	3,539,000
Evaluations of AskRose and PRISM programs	50,000

United Negro College Fund (UNCF)

Washington, DC

Support for the UNCF Indiana Campaign	100,000
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University of Notre Dame

Notre Dame, IN

Indiana Advanced Placement Teacher Investment Program	1,575,000
Partial funding for interdisciplinary research building	35,000,000

Wake Forest University

Winston-Salem, NC

Support for leadership and character education programs (a \$30,784,443 grant shared with the Religion Division)	15,392,222
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Advancing Science of Reading in Indiana

Support to help expand and enhance strategies based in the Science of Reading to improve reading instruction in Indiana classrooms. Grants include support for the statewide efforts of the Indiana Department of Education and for colleges and universities in Indiana to strengthen Science of Reading methods in their teacher preparation programs.

(24 grants in the first round of planning grants to Indiana colleges and universities ranging from \$57,750 to \$100,000; a \$60 million grant to the Indiana Department of Education) 61,889,392

- Anderson University, Anderson, IN
- Ball State University Foundation, Muncie, IN
- Bethel University, Mishawaka, IN
- Calumet College of St. Joseph, Whiting, 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 Department of Education, Indianapolis, IN
- Indiana State University, Terre Haute, IN
- Manchester University, North Manchester, IN
- Marian University, Indianapolis, IN
- Martin University, Indianapolis, IN
- Purdue University, West Lafayette, IN
- St. Mary-of-the-Woods College, Saint Mary-of-the-Woods, IN
- St. Mary's College, Notre Dame, IN
- Taylor University, Upland, IN
- University of Evansville, Evansville, IN
- University of Notre Dame, Notre Dame, IN
- University of Southern Indiana, Evansville, IN
- Valparaiso University, Valparaiso, IN
- Vincennes University Foundation, Vincennes, IN
- Western Governors University, Salt Lake City, UT



Indiana Youth Programs on Campus

An initiative to help public and private colleges and universities create new or expand and enhance existing high-quality, on-campus programs for Hoosier youth, especially youth from populations that have been underserved by higher education

(24 planning grants ranging from \$18,000 to \$50,000 and 35 implementation grants ranging from \$489,480 to \$1,000,000)

29,165,762

Anderson University, Anderson, IN (2)
 Ball State University Foundation, Muncie, IN (2)
 Bethel University, Mishawaka, IN (2)
 Butler University, Indianapolis, IN (2)
 Calumet College of St. Joseph, Whiting, IN (2)
 DePauw University, Greencastle, IN (2)
 Earlham College, Richmond, IN (2)
 Franklin College of Indiana, Franklin, IN (2)
 Goshen College, Goshen, IN
 Grace College, Winona Lake, IN (2)
 Hanover College, Hanover, IN
 Holy Cross College, Notre Dame, IN (2)
 Huntington University, Huntington, IN (2)
 Indiana Institute of Technology, Fort Wayne, IN (2)
 Indiana State University Foundation, Terre Haute, IN (2)
 Indiana University Foundation, Bloomington, IN (2)
 Indiana Wesleyan University, Marion, IN
 Ivy Tech Foundation, Indianapolis, IN
 Manchester University, North Manchester, IN
 Marian University, Indianapolis, IN
 Martin University, Indianapolis, IN
 Oakland City University, Oakland City, IN
 Purdue University, West Lafayette, IN (2)
 Rose-Hulman Institute of Technology, Terre Haute, IN
 St. Mary-of-the-Woods College, Saint Mary-of-the-Woods, IN (2)
 St. Mary's College, Notre Dame, IN (2)
 Taylor University, Upland, IN (2)
 Trine University, Angola, IN
 University of Evansville, Evansville, IN
 University of Indianapolis, Indianapolis, IN (2)
 University of Notre Dame, Notre Dame, IN (2)
 University of Saint Francis, Fort Wayne, IN (2)
 Valparaiso University, Valparaiso, IN (2)
 Vincennes University Foundation, Vincennes, IN (2)
 Wabash College, Crawfordsville, IN (2)



Teacher Creativity Fellowship Program

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

(103 grants of up to \$12,000)

1,200,000

Youth Programming

100 Black Men of Indianapolis

Indianapolis, IN

Operating support and capacity building

235,000

Center for Leadership Development

Indianapolis, IN

Operating support

1,000,000

Child Advocates

Indianapolis, IN

Capacity building to diversify funding and support new program development

50,000

First Baptist Church

Indianapolis, IN

Capital campaign for First Baptist Athletics

2,218,627

IARCA Institute for Excellence

Indianapolis, IN

Continued support for the outcomes project and capacity building

547,800

Indiana Afterschool Network

Indianapolis, IN

Out-of-school-time programs and improvements to IN-QPSA

690,800

Indiana Black Expo

Indianapolis, IN

Youth and family programs and staffing 1,000,000

Indiana Youth Institute

Indianapolis, IN

Indiana Youth Worker Well-Being Project 20,000,000

Operating support 5,000,000

Promise Indiana 892,551

Indiana Youth Services Association

Indianapolis, IN

Youth Professional Renewal Program 790,549

Marion County Commission on Youth (MCCOY)

Indianapolis, IN

Mayor's Youth Leadership Council 248,500

Operating support 350,000

National FFA Foundation

Indianapolis, IN

National FFA Conferences (2022-2024) 1,500,000

Planned Parenthood of the Great Northwest, Hawaii, Alaska, Indiana and Kentucky, Inc.

Seattle, WA

Evidence-based Sexual Health Education for Indiana Youth 50,000

Project Transformation Indiana

Indianapolis, IN

Organizational viability assessment and staffing support 50,000



Mentoring Youth for Post-Secondary Success

Three-year capacity-building grants to strengthen mentoring efforts at Indianapolis organizations that help prepare K-12 students for post-secondary success. The organizations primarily serve students of color, students from immigrant communities, English-language learners, and students from low-income households.

(eight grants ranging from \$90,000 to \$650,000) 2,590,000

Bloom Project, Inc.

Burmese American Community Institute

Crown Community Development Corporation, Inc.

Eclectic Soul VOICES Corporation

Elevate Indianapolis

Escala Foundation

ProAct Community Partnerships

Starfish

Strengthening Youth Programs in Indiana: National Organizations and Affiliates

Support to strengthen nationally affiliated youth serving organizations that provide programs and services to large numbers of youth, ages 5 to 18, throughout Indiana. Planning grants encouraged collaboration with each organization's Indiana affiliates. Implementation grants are supporting work in Indiana communities.

(nine planning grants of \$100,000; nine implementation grants ranging from \$3 million to \$30 million; one \$3 million grant to Indiana Youth Institute to support technical assistance for grantees in the initiative) 95,400,000

Big Brothers and Big Sisters of America, Tampa, FL (2)

Boys & Girls Clubs of America, Atlanta, GA (2)

Girl Scouts of the USA, New York, NY (2)

Girls Incorporated, New York, NY (2)

Indiana Youth Institute, Indianapolis, IN

Junior Achievement USA, Colorado Springs, CO (2)

National Boy Scouts of America Foundation, Irving, TX (2)

National FFA Foundation, Indianapolis, IN (2)

YMCA of the USA, Chicago, IL (2)

YWCA USA, Washington, DC (2)

Summer Youth Program Fund

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

(157 grants to support 191 programs ranging from \$1,700 to \$275,000)

2,683,556

Adult & Child Center
 Agape Therapeutic Riding Center
 American Diabetes Association
 American Foundation for Preventive Medicine
 Artmix
 Arts for Lawrence
 Arts for Learning
 Asante Art Institute of Indianapolis
 AYS
 Benjamin Harrison Presidential Site
 Big Brothers Big Sisters of Central Indiana
 Big Car Media
 Binford Redevelopment and Growth, Inc (North Shadeland Alliance)
 100 Black Men of Indianapolis
 Bosma Industries for the Blind
 Boys & Girls Clubs of Indianapolis
 Brightwood Community Center
 Brooke's Place for Grieving Young People
 Brookside Community Development Corporation
 Burmese American Community Institute
 Camp To Belong Indiana
 Camptown
 Catholic Charities Indianapolis
 Catholic Youth Organization, Camp Rancho Framasa
 Center for Leadership Development
 Children's Museum of Indianapolis
 Christamore House
 Christel House Academy
 Claude McNeal's Musical Theatre Training Program
 Coburn Place Safe Haven
 Community Alliance of the Far Eastside (CAFE)
 Concord Center Association
 D.R.E.A.M. Alive
 Damar Services
 Deeply Ingrained Inc. (Socially Distant Woodworking)
 Diabetic Youth Foundation of Indiana
 DirectEmployers Institute
 Dyslexia Institute of Indiana
 Earth Charter Indiana
 East Tenth United Methodist Children and Youth Center
 Eastern Star Jewel Human Services Corporation



Edna Martin Christian Center
 Elevate Indianapolis
 Englewood Christian Church
 Englishton Park Presbyterian Ministries
 Entrepreneurial Ventures in Education
 Escala Foundation
 Fay Biccard Glick Neighborhood Center at Crooked Creek
 Felege Hiywot Center
 Fellowship of Christian Athletes
 Firefly Children & Family Alliance
 First Samuel Missionary Baptist Church
 Flanner House
 Freetown Village
 Freewheelin' Community Bikes
 George Washington HUB Club INC
 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
 Groundwork Indy
 Happy Hollow Children's Camp

Harrison Center for the Arts (Harrison Center)
Hawthorne Social Service Association
Health and Hospital Corporation
Health and Science Innovations
Hear Indiana
Hemophilia of Indiana
Hispanic Latino Minority Health Coalition of Greater Indianapolis
Hoosier Burn Camp
Hope Academy Inc.
Indiana Amateur Baseball Association
Indiana Annual Conference of the United Methodist Church
Indiana Deaf Camps Foundation
Indiana Golf Foundation
Indiana Latino Institute
Indiana Performing Arts Centre
Indiana State Museum Foundation
Indiana University Foundation
Indiana Writers Center
Indiana Youth Group
Indianapolis Art Center
Indianapolis Children's Choir
Indianapolis Freedom School Partnership
Indianapolis Parks Foundation (The Parks Alliance of Indianapolis)
Indianapolis Soap Box Derby Association
Indianapolis-Marion County Public Library Foundation
Jackson Center for Conductive Education

John H. Boner Community Center (John Boner Neighborhood Centers)
Judah Church of God in Christ
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
Mackida Loveal & Trip Mentoring Outreach Center
Madam Walker Legacy Center
Marian University
Marion County Commission on Youth (4)
Martin Luther King Multi Service Center (MLK Center)
Mary Rigg Neighborhood Center
Mother Loves Garden Inc.
Mt. Moriah Missionary Baptist Church
Music for All
National Aviation Youth Resources Foundation Inc.
National Junior Tennis League of Indianapolis
New Beginnings Church
Nine 13 (Nine13sports)
Northside New Era Community Outreach
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
 Project WILL, Inc.
 Purdue University
 Reach for Youth
 React by Young Actors Theatre
 River West Theatre dba Fonseca Theatre Company
 St. Florian Center
 St. Richard's School
 Salvation Army Indiana Division
 School on Wheels
 Second Helpings
 SHE. EVENT INDY (SHE. Xperience)
 Shepherd Community
 SHEroes
 Social Health Association of Indiana
 Soul Food Project
 Southeast Community Services
 Sports World
 Starfish
 Stem Connection
 Stop the Violence Indianapolis
 Storytelling Arts of Indiana
 Symphonic Youth Orchestra of Greater Indianapolis
 Trinity House Academy
 Wayne Township Education Foundation
 Westminster Neighborhood Services
 YMCA of Indianapolis
 Young Life Indianapolis Urban Growth
 Zion Hill Missionary Baptist Church

Summer Youth Program Fund – Capital

Capital project grants for organizations in Indiana to improve capacity to conduct summer programs for Indianapolis (Marion County) youth
 (37 grants ranging from \$1,359 to \$30,000) 758,444

Agape Therapeutic Riding Center
 Artmix
 Big Brothers Big Sisters of Central Indiana
 Big Car Media
 100 Black Men of Indianapolis
 Boys & Girls Clubs of Indianapolis
 Brookside Community Development Corporation

Burmese American Community Institute
 Camptown
 Children's Museum of Indianapolis
 Christel House Academy
 Community Alliance of the Far Eastside (CAFE)
 D.R.E.A.M. Alive
 Diabetic Youth Foundation of Indiana
 East Tenth United Methodist Children and Youth Center
 Edna Martin Christian Center
 Englishton Park Presbyterian Ministries
 Felege Hiywot Center
 First Samuel Missionary Baptist Church
 Flanner House
 Girl Scouts of Central Indiana
 Harrison Center for the Arts (Harrison Center)
 Hawthorne Social Service Association
 Indiana Golf Foundation
 Indiana State Museum Foundation
 Indiana University Foundation
 Indianapolis Ballet
 Indianapolis Freedom School Partnership
 Indianapolis Soap Box Derby Association
 Latino Youth Collective of Indiana
 Martin Luther King Multi Service Center (MLK Center)
 New Beginnings Church
 Nine 13 (Nine13sports)
 Paramount School of Excellence
 Peace Learning Center
 Stem Connection
 Zion Hill Missionary Baptist Church

Subtotal

Education Division Grants 287,544,246

Subtotal

Education Youth Programming Grants 136,055,827
 Education Division Discretionary Grants 70,750

Total

Education Division Grants 423,670,823



Religion Division Grants

Dollar amount approved in 2022

Association of Theological Schools

Pittsburgh, PA

Continued support for Leadership Education for Theological Education program	10,000,000
Project to assist theological schools in serving students from diverse backgrounds	5,600,000

Calvin University

Grand Rapids, MI

Continued support for Calvin Institute of Christian Worship	15,031,500
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Cardus

Mason, OH

Support for Breaking Ground 2.0 project	350,000
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Christian Theological Seminary

Indianapolis, IN

Support for Lilly Endowment Indiana and National Clergy Renewal Programs for 2023 and 2024	14,400,000
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Church Benefits Association

Lexington, KY

Strategic Planning Initiative	50,000
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City Seminary of New York

New York, NY

Continued support for Ministry in the City Hub project	15,000,000
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The Conversation US

Waltham, MA

Continued support for Global Religion Journalism Initiative	4,973,651
Continued support for project to strengthen journalism in religion and philanthropy	1,350,000

Council of Independent Colleges

Washington, DC

Supplemental support for Network for Vocation in Undergraduate Education program	15,296,000
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Duke University

Durham, NC

Capacity-building support for Christian Institutions that Support Congregations	15,000,000
Continued support for Everything Happens Initiative	2,362,500

Fund for Theological Education

Decatur, GA

Continued support for strategic initiatives to build networks for cultivating a new generation of Christian leaders	6,500,000
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In Trust

Wilmington, DE

Continued support for In Trust Center for Theological Schools program	7,500,000
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Indiana Landmarks

Indianapolis, IN

Support for Sacred Places Indiana program	10,000,000
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Indiana University Foundation

Bloomington, IN

Partial continued support for Spirit & Place Festival	650,000
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Indianapolis Center for Congregations

Indianapolis, IN

Congregations with Community Project	15,000,000
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Continued support for Congregational Resource Guide program	1,500,000
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Continued support for project to strengthen evaluation practices and communication strategies of religion projects	4,293,122
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Continued support for regional centers for congregations in Indiana	8,000,000
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Interfaith America

Chicago, IL

Developing Interfaith Leaders In and Beyond Higher Education project	6,000,000
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Lipscomb University

Nashville, TN

Partial support for Tokens Show public media project	933,075
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Missouri State University Foundation

Springfield, MO

Landscape study of chaplaincy and campus ministry in the United States	209,552
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National Trust for Historic Preservation

Washington, DC

Continued support for National Fund for Sacred Places program	22,995,211
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Partners for Sacred Places

Philadelphia, PA

Continued support for National Fund for Sacred Places program	5,768,304
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Pew Charitable Trusts

Philadelphia, PA

U.S. Religious Landscape Survey project	3,000,000
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Religion News Foundation

Columbia, MO

Continued support for Global Religion Journalism Initiative	1,925,000
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Continued support for Religion News Service project	1,445,000
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Shakertown at Pleasant Hill (Shaker Village)

Harrodsburg, KY

Support for The Believers: Shaker Theology and Worship exhibit	275,000
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Smithsonian Institution

Washington, DC

Support for National Museum of the American Latino	10,000,000
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The Colossian Forum

Grand Rapids, MI

Second Phase of the Next Faithful Step in Church Resiliency project	1,599,486
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University of Notre Dame

Notre Dame, IN

Support for study to examine cultural changes that are affecting religious life	828,810
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University of Virginia

Charlottesville, VA

Continued support for the Project on Lived Theology	439,670
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Valparaiso University

Valparaiso, IN

Supplemental support for Lilly Fellows Program in Humanities and the Arts	2,407,441
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Wake Forest University

Winston-Salem, NC

Support for leadership and character education programs (a \$30,784,443 grant shared with the Education Division)	15,392,221
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Christian Parenting and Caregiving Initiative

Support through an invitational round of funding to help organizations deepen and enhance the religious education and formation of children and youth by helping interested parents and caregivers both learn and engage in Christian practices to pass their faith and values to their children

(23 planning grants ranging from \$22,000 to \$50,000; 22 implementation grants ranging from \$550,000 to \$1,000,000; and one grant of \$2,215,712 to support a coordination program of the initiative)

24,713,473

Advanced Studies in Culture Foundation,
Charlottesville, VA (2)
Boston University, Boston, MA
The Catechesis of the Good Shepherd, Inc.,
Scottsdale, AZ (2)
Center for Children and Theology,
Washington, DC (2)
Center for Youth Ministry Training,
Brentwood, TN (2)
Especialidades 625, Golden Valley, MN (2)
GenOn Ministries, Monroeville, PA (2)
Godly Play Foundation, Ashland, KS (2)
Indiana Wesleyan University, Marion, IN (3)
Louisville Presbyterian Theological Seminary,
Louisville, KY (2)
Memphis Theological Seminary, Memphis, TN (2)
National Federation for Catholic Youth Ministry,
Washington, DC (2)
Northwest University, Kirkland, WA (2)
Olivet Nazarene University, Bourbonnais, IL (2)
Passport, Birmingham, AL (2)
Protestant Episcopal Theological Seminary in
Virginia, Alexandria, VA (2)
reThink Group (Orange), Cumming, GA (2)
Rio Texas Conference, United Methodist
Church, San Antonio, TX (2)
Search Institute, Minneapolis, MN (2)
Seattle Pacific University, Seattle, WA (2)
SpringHill Camps, Grand Rapids, MI (2)
Vibrant Faith Ministries, Chapel Hill, NC (2)
YouthFront, Inc., Kansas City, KS (2)

Compelling Preaching Initiative

Support in an invitational round of funding to help organizations representing diverse Christian traditions develop new and/or enhance existing programs to improve the quality of preaching among preachers and aspiring preachers

(33 planning grants ranging from \$35,200 to \$50,000; 32 implementation grants ranging from \$829,000 to \$1,000,000; one grant of \$6,533,371 to support a coordination program of the initiative) 39,915,530

African Methodist Episcopal Church
(Department of Research and Scholarship),
Nashville, TN (2)
Alliance for Christian Media, Atlanta, GA (2)
America Media, New York, NY (2)
Aquinas Institute of Theology, St. Louis, MO (2)
Archdiocese of Chicago, Chicago, IL (2)
Calvin Theological Seminary,
Grand Rapids, MI (2)
Calvin University, Grand Rapids, MI
Christian Theological Seminary,
Indianapolis, IN (2)
Christianity Today, Carol Stream, IL (2)
Church of the Nazarene, Lenexa, KS (2)
Duke University, Durham, NC (2)
Episcopal Preaching Foundation,
Springfield, NJ (2)
Evangel University, Springfield, MO (2)
Evangelical Lutheran Church in America,
Chicago, IL (2)
Garrett-Evangelical Theological Seminary,
Evanston, IL (2)
General Assembly of the Christian Church,
Indianapolis, IN (2)
General Board of Discipleship of the
United Methodist Church, Nashville, TN (2)
Hampton University, Hampton, VA (2)
Logos Evangelical Seminary, El Monte, CA (2)
Luther Seminary, St. Paul, MN (2)
Methodist Theological School in Ohio,
Delaware, OH
National Hispanic Christian Leadership
Conference, Sacramento, CA (2)
Pepperdine University, Malibu, CA (2)
Progressive National Baptist Convention,
Washington, DC (2)
Protestant Episcopal Theological Seminary in
Virginia, Alexandria, VA
St. Vladimir's Orthodox Theological Seminary,
Yonkers, NY (2)
Society for the Advancement of Ecclesial
Theology, Oak Park, IL (2)

Union Presbyterian Seminary, Richmond, VA (2)
 University of Dallas, Irving, TX (2)
 University of Indianapolis, Indianapolis, IN (2)
 University of Notre Dame, Notre Dame, IN (2)
 University of Southern California,
 Los Angeles, CA (2)
 Village United Presbyterian Church,
 Prairie Village, KS (2)
 Wheaton College, Wheaton, IL (2)
 WomanPreach!, Delaware, OH

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. This is the third round of grantmaking in this initiative.

(eight implementation grants of \$1,000,000; one grant of \$3,369,294 to continue support for a coordination program of the initiative) 11,369,294

African Methodist Episcopal Zion Church, Inc.,
 Charlotte, NC
 Board of Incorporators of The African
 Methodist Episcopal Church, Memphis, TN
 Catholic Church Extension Society of the
 United States of America, Chicago, IL
 Christian Methodist Episcopal Church,
 Evanston, IL
 Indianapolis Center for Congregations,
 Indianapolis, IN
 PCA Retirement and Benefits,
 Lawrenceville, GA
 The Pentecostal Churches of the Apostolic
 Faith International Inc., Louisville, KY
 St. Joseph's Society Josephite Fathers,
 Baltimore, MD
 Vineyard USA, Stafford, TX

Nurturing Children through Worship and Prayer Initiative

Support to help organizations develop new or enhance and expand existing programs that support congregations as they design corporate worship services and prayer practices that more intentionally and fully engage children

(33 planning grants ranging from \$40,000 to \$50,000) 1,615,634

African Methodist Episcopal Zion Church, Inc.,
 Charlotte, NC
 All Belong, Wyoming, MI
 Autism Faith Network, Newnan, GA
 Baylor University, Waco, TX
 Belmont University, Nashville, TN
 Capital University, Columbus, OH
 Catholic University of America, Washington, DC
 China Evangelical Seminary North America,
 West Covina, CA
 Choristers Guild, Dallas, TX
 Christian Methodist Episcopal Church, Evanston, IL
 Columbia Theological Seminary, Decatur, GA
 Emory University, Atlanta, GA
 Fuller Theological Seminary, Pasadena, CA
 General Council of the Assemblies of God,
 Springfield, MO
 Grace Mission University Graduate School,
 Fullerton, CA
 Latin American Bible Institute, La Puente, CA
 Local Church Ministries, Cleveland, OH
 Mexican American Catholic College, San Antonio, TX
 Nazarene Theological Seminary, Kansas City, MO
 Phillips Theological Seminary, Tulsa, OK
 Presbyterian Church in America Committee
 on Discipleship Ministries, Lawrenceville, GA
 Publishing House of the Evangelical Lutheran
 Church, Minneapolis, MN
 St. Meinrad Archabbey, St. Meinrad, IN
 St. Olaf College, Northfield, MN
 Seminario Evangelico de Puerto Rico,
 San Juan, PR
 Shaw University, Raleigh, NC
 Southeast Regional Office for Hispanic
 Ministry, Miami, FL
 Teaching Like Jesus Ministries, Inc.,
 Los Angeles, CA
 Trinity International University, Deerfield, IL
 University of Notre Dame, Notre Dame, IN
 Villanova University, Villanova, PA
 Western Theological Seminary of the
 Reformed Church in America, Holland, MI
 World Mission University, Los Angeles, CA





Pathways for Tomorrow Initiative

Supporting theological schools across the United States and Canada as they better prepare pastoral leaders from a wide variety of backgrounds to serve in increasingly diverse congregational settings

(21 implementation grants ranging from \$827,746 to \$1 million; 16 large-scale grants to support collaborative endeavors ranging from \$4,999,792 to \$7,950,555; two grants of \$590,205 and \$4,750,000 to support coordination programs for the initiative)

108,801,438

Anabaptist Mennonite Biblical Seminary, Elkhart, IN
 Anderson University, Anderson, IN
 Andrews University, Berrien Springs, MI
 Aquinas Institute of Theology, St. Louis, MO
 Ashland University, Ashland, OH
 Association of Theological Schools, Pittsburgh, PA
 Augustine Institute, Greenwood Village, CO
 Azusa Pacific University, Azusa, CA
 B. H. Carroll Theological Institute, Irving, TX
 Baptist Seminary of Kentucky, Georgetown, KY
 Berkeley School of Theology, Berkeley, CA
 Bethany Theological Seminary, Richmond, IN
 Biola University, La Mirada, CA
 Eastern Mennonite University, Harrisonburg, VA
 Eden Theological Seminary, St. Louis, MO
 Emory University, Atlanta, GA
 Evangel University, Springfield, MO
 Hood Theological Seminary, Salisbury, NC
 Howard University, Washington, DC
 In Trust, Wilmington, DE
 Indigenous Pathways, Inc., Shoreline, WA (2)
 Northern Baptist Theological Seminary, Lisle, IL
 Oblate School of Theology, San Antonio, TX
 Pacific School of Religion, Berkeley, CA
 Palm Beach Atlantic University, West Palm Beach, FL
 Puritan Reformed Theological Seminary, Grand Rapids, MI
 St. Vladimir's Orthodox Theological Seminary, Yonkers, NY

Saint John's University, Collegeville, MN
 Seminario Evangelico de Puerto Rico, San Juan, PR
 Shaw University, Raleigh, NC
 Sioux Falls Seminary, Sioux Falls, SD
 Southeastern University, Lakeland, FL
 Tyndale University College and Seminary, Toronto, ON
 Union Theological Seminary, New York, NY
 University of Notre Dame, Notre Dame, IN
 University of St. Mary of the Lake-Mundelein Seminary, Mundelein, IL
 Wesley Theological Seminary, Washington, DC
 World Mission University, Los Angeles, CA

Religion and Cultural Institutions Initiative

Grants to museums and other cultural institutions across the United States to develop exhibitions and educational programs that fairly and accurately portray the role of religion in the U.S. and around the world. This is the second round of grants in the initiative.

(one \$50,000 planning grant; 16 implementation grants ranging from \$1,926,655 to \$3,000,000) 39,623,186

Children's Museum, Inc., Houston, TX
 Colonial Williamsburg Foundation, Williamsburg, VA
 The Detroit Institute of Arts, Detroit, MI
 Foundation for Mississippi History, Jackson, MS (2)
 Indiana State Museum Foundation, Indianapolis, IN
 Indiana University Foundation, Bloomington, IN
 Jamestown Yorktown Foundation, Williamsburg, VA
 Library of Congress, Washington, DC
 Martin Luther King, Jr. Center for Nonviolent Social Change (The King Center), Atlanta, GA
 Mount Vernon Ladies' Association of the Union, Mount Vernon, VA
 National Constitution Center, Philadelphia, PA
 National Museum of African American Music, Nashville, TN
 National Museum of American Jewish History, Philadelphia, PA
 National Museum of Mexican Art, Chicago, IL
 National Underground Railroad Freedom Center, Cincinnati, OH
 United States Holocaust Memorial Museum, Washington, DC

Strengthening Ministries with Youth Initiative

Support for programs that help congregations and youth ministry organizations design and test new models for ministries with middle and high school youth, ages 12 to 18

(15 implementation grants ranging from \$998,050 to \$1,500,000; one \$10,700,000 grant to help develop a network of ministry organizations working with youth and congregations; and one \$384,180 grant to support a coordination program for the initiative) 27,648,209

Azusa Pacific University, Azusa, CA
 CrossRoad Institute, Inc., Cambridge, MA
 Evangelical Lutheran Church in America, Chicago, IL
 Flagler College, St. Augustine, FL
 Fuller Theological Seminary, Pasadena, CA (3)
 Hispanic Ministry Center (Urban Youth Workers Institute), Santa Ana, CA
 Instituto Fe Y Vida, Stockton, CA
 LaSallian Educational and Research Initiatives, Winona, MN
 Louisville Presbyterian Theological Seminary, Louisville, KY
 Mosaic House Ministries, North Chicago, IL
 National Federation for Catholic Youth Ministry, Washington, DC
 Point Loma Nazarene University, San Diego, CA
 Princeton Theological Seminary, Princeton, NJ
 reThink Group (Orange), Cumming, GA
 Samford University, Birmingham, AL

Thriving in Ministry Initiative

Support to sustain programs that help pastors thrive in congregational leadership to enhance the vitality of the congregations they serve

(14 sustainability grants ranging from \$112,431 to \$500,000; one grant of \$4,306,295 to support a coordination program for the initiative) 10,628,206

Baptist General Association of Virginia, Henrico, VA
 Benedict Inn Retreat & Conference Center, Beech Grove, IN
 Brite Divinity School, Fort Worth, TX
 Catholic Church Extension Society of the United States of America, Chicago, IL
 Catholic Leadership Institute, Malvern, PA
 City Seminary of New York, New York, NY
 Columbia Theological Seminary, Decatur, GA
 Duke University, Durham, NC
 Pepperdine University, Malibu, CA
 Princeton Theological Seminary, Princeton, NJ
 Protestant Episcopal Theological Seminary in Virginia, Alexandria, VA
 Texas Methodist Foundation, Austin, TX

Union Baptist Church, New York, NY
 University of Notre Dame, Notre Dame, IN
 Virginia Union University, Richmond, VA

Young Adult Initiative

Support for programs to help congregations engage young adults, ages 23 to 29, and work with them to design innovative ministries that support and enrich their religious lives. This is the second round of grants for the initiative.

(one \$50,000 planning grant; 11 implementation grants ranging from \$1,499,970 to \$4,000,000; and one grant of \$2,729,546 to support a coordination program for the initiative) 21,779,510

Arrabon, Richmond, VA
 Children's Defense Fund, Washington, DC
 Emory University, Atlanta, GA
 Indiana Wesleyan University, Marion, IN
 Indianapolis Center for Congregations, Indianapolis, IN
 Loyola University, New Orleans, LA
 Princeton Theological Seminary, Princeton, NJ (2)
 United Methodist Church of Los Altos, Los Altos, CA
 University of Notre Dame, Notre Dame, IN
 Westmont College, Santa Barbara, CA
 Whitworth University, Spokane, WA
 Yale University, New Haven, CT

Subtotal

Religion Division Grants 512,170,023
 Religion Division Discretionary Grants 18,000

Total

Religion Division Grants 512,188,023

Grand Total – All Divisions 1,297,945,703

Matching Grants—staff, retiree and Board giving 14,843,863
 Total—All Grants Approved 1,312,789,566

*Reconciliation to Financial Statements

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

Adjustments (28,187,990)
 Net Total—Grants Approved 1,284,601,576

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 youth, and religion.

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 services needs, city and neighborhood revitalization, low- and moderate-income housing, and arts and culture in Indianapolis. We have a special interest in helping organizations that serve residents affected by poverty or other societal challenges and that help advance the prosperity of residents from communities of color who are disproportionately affected by these and other challenges. 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, programs for veterans' affairs and their families, and selective research projects and educational programs focused on efforts to promote the effectiveness of charitable organizations and enhance and increase charitable giving.

Education and Youth



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. We have a special interest in advancing the success of students of color and students from low-income households. On a national level, we support on an invitational basis programs that expand and enhance higher education opportunities for African Americans, Native Americans and Latino Americans.

In our youth development grantmaking, we seek to help youth reach their full potential by fostering healthy development through programs and strategies that enhance and complement what youth experience in school. Our youth grants fund direct service organizations in Indianapolis and, at times through invitational or competitive initiatives, such organizations throughout the state of Indiana. Our grants help build the capacity of youth intermediary organizations throughout the state and support the professional development of the staffs and volunteer leadership of these organizations. We have a special interest in youth affected by poverty or other societal challenges and in promoting the success of youth from communities of color who are disproportionately affected by such challenges. Although our youth grantmaking is principally focused in Indiana, we occasionally provide support on an invitational basis for national youth development organizations.

Religion



Our religion grantmaking aims to deepen and enrich the religious lives of Christians in the United States, principally by supporting efforts that enhance the vitality of congregations and help individuals and families from diverse communities explore their deepest spiritual questions, discover the wonders of Christian life and faith and encounter God. We value the broad diversity of Christian communities and traditions and endeavor to support their efforts to carry forward their missions in a wide variety of contexts. We believe that the long-term health of

congregations depends on excellent pastoral leadership, and we seek to ensure that all types of congregations have a steady stream of wise, faithful, diverse and well-prepared leaders.

We support efforts that nurture the religious lives of Christians—especially children, youth and young adults—and that help them 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 individuals, especially youth and young adults, discover how God is calling them to lead lives of meaning and purpose. We also support efforts to strengthen theological schools and other religious institutions and networks that prepare and support pastors and congregations serving increasingly diverse Christian communities.

In addition, through grants to major cultural institutions and 501(c)(3) news and media organizations, we seek to foster greater public understanding about the beliefs and practices of religious communities of all faiths. In advancing this objective, we encourage efforts that present fair and accurate portrayals of the positive and negative effects of religion on the world.

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 (HBCUs), 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 our 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 on an invitational basis that fall squarely within our specific program areas.
- Endowments or endowed chairs. The Endowment does not fund endowment or endowed chairs, except in special initiatives or unusual cases involving longstanding grantees.
- Public libraries. Except for special initiatives, the Endowment regularly declines grants to public libraries outside Marion County, Ind.

Requests from organizations 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 special initiatives.

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 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 will need from us. We respond in writing to all preliminary inquiries. In cases that warrant further consideration, we may ask you to furnish a full proposal. Preliminary letters should be sent only by regular or overnight mail.

Approval process

The Endowment can only fund a small percentage of the 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 foundation since 1937

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P.O. Box 88068
Indianapolis, IN 46208-0068
317-924-5471
lillyendowment.org



Advancing Science of Reading in Indiana

In 2022, Lilly Endowment launched in coordination with the Indiana Department of Education (IDOE) complementary efforts to improve reading instruction for children in kindergarten through second grade in Indiana schools through the use of evidence-based teaching practices aligned with the Science of Reading (SoR). The Endowment is allocating up to \$85 million to fund these efforts.

According to the Reading League, SoR is “a vast interdisciplinary body of scientifically based research about reading and issues related to reading and writing.” It provides a research-based strategy that integrates instructional practices with efforts focused around phonics, phonemic awareness, fluency, vocabulary and comprehension.

Learning to read in the early years of elementary school is the foundation upon which all subsequent learning builds. Unfortunately, only 33 percent of Indiana fourth graders in 2022 were proficient readers according to the National Assessment of Education Progress. Students from economically disadvantaged households fared even worse. The assessment also revealed significant equity gaps in reading achievement between Black and Hispanic students and their white peers.

Because SoR-aligned teaching practices have been shown to significantly improve students’ reading abilities, the Endowment is providing:

- Up to \$60 million to expand IDOE’s efforts to provide coaching and professional development in SoR teaching practices for a majority of Indiana’s current kindergarten, first and second grade teachers.

- Up to \$25 million for the Advancing Science of Reading Initiative (ASRI) to help Indiana colleges and universities that

prepare future educators align the instructional methods and curricula used in their teacher preparation programs to those demonstrated to lead to early reading success based on SoR. Planning grants are helping 31 Indiana colleges and universities learn more about SoR, examine how they could enhance and expand the teaching of SoR practices and prepare proposals for implementation grants from the Endowment. The Endowment expects to award implementation grants in 2023 ranging from \$500,000 to up to \$1.5 million to support compelling strategies focused on the use of SoR in teacher preparation.

In October 2022, the Endowment invited Indiana higher education leaders to a convening to learn more about SoR and ASRI’s grant opportunities (photo below). More than 150 college and university presidents, provosts, and deans, department chairs and faculty in teacher preparation programs heard from national SoR experts. Presentations addressed how reading achievement is improving in communities whose schools have adopted SoR practices and how the teaching of such practices can be strengthened in teacher preparation programs.

Kareem Weaver, a Science of Reading expert from Oakland, Calif., and Katie Jenner, Indiana Secretary of Education.





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Boys & Girls Clubs
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Page 20: Boys & Girls Clubs
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Page 28-30: Parish Collective

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