



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 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.

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



“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.