Welcome

On behalf of the staff and board of directors of Indiana Philanthropy Alliance, we are pleased to welcome you to the 2022 Philanthropy Leads Conference presented by Goelzer Investment Management.

This conference is an opportunity to learn and grow together. We will explore how to increase philanthropy’s impact in Indiana and beyond. We will reconnect with some and build new relationships with others.

This statewide event is designed to provide quality information and resources. The thought-provoking keynotes will whet your appetite for learning while the wide variety of skill-building sessions will quench it. Our goal is to foster a safe and creative environment in which we can challenge each other to uncover new strategies for success to better ourselves and our communities.

Thank you to everyone who made this conference possible, including the IPA board of directors, staff, education committee, our generous sponsors, volunteers, and, of course, the presenters.

Please take advantage of all the conference has to offer. Keep a curious and open mind in your sessions and you’ll be rewarded with a meaningful and uplifting experience. We hope the conference informs your future work and inspires you to improve your already-amazing work in ensuring our people and communities thrive.
The IPA board and staff are deeply grateful for our incredible sponsors and supporters. Their generous backing has allowed us to offer this high-quality, educational experience at an affordable price to our philanthropic community.
LOGISTICS

REGISTRATION
Stop by the registration table before entering the conference to check in and claim your name badge and gift bag from our amazing sponsors.

WI-FI
Network: Westin_Conference
Password: PhilanthropyLeads!

SESSION SLIDES
Session slides and materials can be found on the online agenda at: inphilanthropy.org/conference

GET SOCIAL
Join the conversation online by using the #PhilanthropyLeads2022 hashtag.

HELP DESK
Not sure where to go? Have a question you can’t seem to find an answer to? A friendly face is waiting for you at the Help Desk to assist you. You’ll find the Help Desk in front of the Congress Room at the registration table.

LOST & FOUND
Left something behind while moving from one room to another? Found something that someone else would like back? Stop by Lost & Found at the Help Desk.

CHARGING STATION
In a pinch and need to charge your device? IPA has a limited number of charging cords available at the Help Desk. Drop off your device for a quick charge while you attend a session and pick it up during the next break.

LOUNGE
If you’re looking for a spot to kick back and relax, catch up on emails, or talk shop with a new thought partner, the conference lounge is the place for you. Find it near the Help Desk in Congress II Room.

SURVEYS
Before heading to your next session, please complete our brief in-room surveys. Your ratings inform us on what topics and speakers you want to see more of in the future.

ACCESSIBILITY INFORMATION
IPA is committed to providing the best possible experience for all attendees. If you have accessibility needs or require accommodations throughout the conference, please stop by the Help Desk and IPA will make every effort to ensure your needs are met.

HEALTH & SAFETY
This event complies with current local and state COVID-19 health and safety requirements. IPA requests that guests not attend this event if they have reason to believe they have contracted COVID-19 or if they are displaying related symptoms. Face masks and a limited supply of test kits will be available upon request at the Help Desk.

We encourage you to wear one of two color-coded lanyards to indicate to other attendees your personal comfort with in-person interaction:

- BLUE: Comfortable with hand shakes and high-fives
- RED: Greet from a distance with no physical contact

YOGA
Looking for a fun way to reduce stress, increase focus, and revitalize your senses? Yoga is held Wednesday and Thursday at 6:30 am in Hudnut Commons (lawn in front of The Westin between Washington and Maryland Streets). Please meet 10 minutes prior in the lobby to walk over together.
PARKING

VISIT INDY

Find a plethora of parking maps, meters, and alternate transportation options at:
visitindy.com/indianapolis-transportation-parking

NEARBY GARAGES

Refer to map on next page for locations on:

1. The Westin Hotel (guests can charge to room)
   Daily On-Site Self Parking: $53 (no in/out)
   Daily Valet Parking: $49 (with in/out)

2. Plaza Park Garage: $26 for 4+ hours
   109 S. Capitol Ave., Indianapolis, IN 46204

3. PNC Garage: $38 for 3-24 hours
   101 W. Washington St., Indianapolis, IN 46204

PARKING APPS

Use apps such as ParkWhiz and SpotHero to find garages and parking lots with pricing specific to the days/times you need and options to reserve your space.

METERED PARKING

Street parking is available in downtown Indianapolis (up to 4 hours) at $1.75/hr. Download the ParkMobile app to make street parking easier.

IPA is not responsible for price increases and encourages attendees to verify pricing and location options in advance.
Schedule At-A-Glance

TUESDAY, SEPT. 27

PRECONFERENCE ACTIVITIES

8:30 am - 11:30 am  MINI DIVES
Check in at the Registration Table for room locations.
• Trust-Based Philanthropy: Cultivating a Culture of Trust
• Depolarizing Within: Looking Inward & Changing Attitudes
• Equitable Grantmaking in Practical Terms
• Foundant Insider Scoop

SITE VISITS
Check in no later than 8:15 am at the Registration Table. Transportation leaves at 8:30 am.
• Impact Investing: CICF, Cook Medical, and Goodwill Partnership
• Agape Therapeutic Riding Site Visit

CONFERENCE DAY 1

8:00 am  REGISTRATION OPENS

12:00 pm to 1:45 pm  OPENING LUNCHEON & KEYNOTE | CAPITOL ROOM
Philanthropy’s Role in Supporting Sustainable Local News by Jim Brady, Vice President, Journalism, Knight Foundation
Opening Remarks: Claudia Cummings, President & CEO, IPA

1:45 pm to 2:15 pm  NETWORKING BREAK

2:15 pm to 3:30 pm  CONCURRENT SESSIONS
• Impact Investments: Affordable Housing in Small Communities | CAPITOL I ROOM
• Increasing Civility, Pluralism, and Social Cohesion | CAPITOL III ROOM
• ‘More than Money’ Philanthropy—Digital Access for All | CAUCUS/CABINET ROOM
• The Power of Purpose: How Social Impact Drives Business Results | COUNCIL/CHAMBER ROOM

3:30 pm to 4:00 pm  NETWORKING BREAK

4:00 pm to 5:15 pm  CONCURRENT SESSIONS
• Agency Funds: Avoiding Pitfalls and Maximizing the Opportunity | COUNCIL/CHAMBER ROOM
• Cybersecurity Risk Management | CAUCUS/CABINET ROOM
• Getting to the Roots of Community Engagement | CAPITOL III ROOM
• ESG Investing: Strategies for Using it to Your Organization’s Advantage | CAPITOL I ROOM
CONFERENCE DAY 2

6:30 am to 7:00 am  **WAKE UP YOGA BY BLACKBAUD**
Meet 10 minutes prior in the lobby to walk over to Hudnut Commons (see map).

7:45 am to 8:45 am  **NETWORKING BREAKFAST | CAPITOL ROOM**
Start your day right by joining colleagues to share a meal, compare notes, and connect on your work.

9:00 am to 10:00 am  **MORNING KEYNOTE | CAPITOL ROOM**

*Emcee: Jenna Wachtmann, Vice President, Ball Brothers Foundation*

10:15 am to 11:30 am  **CONCURRENT SESSIONS**
- Regulatory Proposals That Could Change Philanthropy | CAPITOL ROOM
- Auditing Your Audit | CAUCUS ROOM
- Increasing Social Impact Through Employee Engagement | CHAMBER ROOM
- Leading from Where You Are | CABINET ROOM
- The Art & Science of Making People Care | COUNCIL ROOM

11:30 am to 12:00 pm  **NETWORKING BREAK**

12:00 pm to 1:00 pm  **PHILANTHROPY AWARDS LUNCH | CAPITOL ROOM**
Announcing the winners of the Legislator of the Year and the Hazelett Award for Leadership in Grantmaking, presented by Ekstrom Alley Clontz & Associates

*Emcee: Rich Haddad, President & CEO, K21 Health Foundation*

1:00 pm to 1:30 pm  **NETWORKING BREAK**

1:30 pm to 5:00 pm  **EXHIBITOR IDEA EXCHANGE | CAPITOL ROOM**
Drop in for sweet treats, cool swag, and meaningful conversation with the industry’s top advisors.
Complete your prize passport to win gifts from our generous sponsors!

1:30 pm to 4:45 pm  **QUICK HITS**
In between gathering solutions at the Idea Exchange, choose your own adventure with one or more 45-minute Quick Hits.

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<tr>
<th>ROOM</th>
<th>QUICK HITS ROUND 1 1:30 pm to 2:15 pm</th>
<th>QUICK HITS ROUND 2 2:45 pm to 3:30 pm</th>
<th>QUICK HITS ROUND 3 4:00 pm to 4:45 pm</th>
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<tr>
<td>CHAMBER</td>
<td>Arts, Culture &amp; Creativity</td>
<td>Public Health</td>
<td>Arts, Culture &amp; Creativity</td>
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<td>CABINET</td>
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<td>Equity, Inclusion &amp; Opportunity</td>
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<td>CAPITOL</td>
<td>EXHIBITOR IDEA EXCHANGE</td>
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*5:30 pm to 9:00 pm  **PHILANTHROPY LEADS DINNER | INDIANA ROOF BALLROOM**

*Registration opens at 5:30 pm. Reception at 6 pm. Program and dinner at 7 pm.*

Featuring a fireside chat on mental health with Governor Eric Holcomb and Colts vice chair/owner Kalen Jackson. This event celebrates 2022 graduates of Mutz Philanthropic Leadership Institute.
### THURSDAY, SEPT. 29

#### CONFERENCE DAY 3

<table>
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<th>Time</th>
<th>Event</th>
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| 6:30 am to 7:00 am | **WAKE UP YOGA BY BLACKBAUD**  
Meet 10 minutes prior in the lobby to walk over to Hudnut Commons (see map). |
| 7:45 am to 8:45 am | **NETWORKING BREAKFAST CELEBRATING YOUTH PHILANTHROPY** | **CAPITOL ROOM**  
Join us as we lift up the incredible generosity and value of youth philanthropy. |
| 9:00 am to 10:15 am | **CONCURRENT SESSIONS**  
• Addressing the Complexities of Poverty: A Case Study of Collaboration | **CAPITOL I ROOM**  
• Effective Investment/Finance Committee Management | **CAUCUS/CABINET ROOM**  
• Reimagining Capacity Building | **CAPITOL III ROOM**  
• Using Data to Drive Change | **COUNCIL/CHAMBER ROOM** |
| 10:15 am to 10:45 am | **NETWORKING BREAK** |
| 10:45 am to 12:00 pm | **CONCURRENT SESSIONS**  
• Board Engagement Through a Leadership Lens | **CAPITOL I ROOM**  
• Surviving the Great Resignation | **CAPITOL III ROOM**  
• Stories that Connect Us | **CAUCUS/CABINET ROOM**  
• Mission Align 360 | **COUNCIL/CHAMBER ROOM** |
| 12:00 pm to 12:30 pm | **NETWORKING BREAK** |
| 12:30 pm to 2:30 pm | **LUNCH KEYNOTE** | **CAPITOL ROOM**  
How to Change the World When the World Keeps Changing by Kris Putnam-Walkerly, Award-Winning Author and Global Philanthropic Advisor  
*Emcee: Stephanie Overbey, CEO, Kosciusko County Community Foundation* |
Thank You

We extend an extraordinary thank you to all IPA members. We appreciate the opportunity to partner together and serve you.

IPA is also grateful to have such an engaged and active board and education committee to help guide our activities. Thank you for your invaluable input and assistance in making this conference happen.

Sincerely,
Claudia Cummings
President & CEO

IPA BOARD OF DIRECTORS

*CHAIR: Richard Haddad, President & CEO, K21 Health Foundation
*VICE CHAIR: Cheryl Taylor, Owner, Taylor Leadership Consulting
*TREASURER: Timothy Murphy, Principal, Nonprofit Financial Solutions
*SECRETARY: Stephanie Overbey, CEO, Kosciusko County Community Foundation

Shannon Borden, Director, Blue & Co., LLC
Jill Carpenter, Executive Director, Community Foundation Alliance
Dan Davis, President & CEO, Community Foundation of Jackson County
Brienne Hooker, Executive Director, Jasper Newton Foundation
Thomas Major, Jr., Associate General Counsel, Lumina Foundation
September McConnell, CEO, Community Foundation of Whitley County
Pamela Ross, Vice President of Opportunity, Equity & Inclusion, The Indianapolis Foundation/Central Indiana Community Foundation
Jeff Small, Vice President of Programs, Nina Mason Pulliam Charitable Trust
Maggi Spartz, President, Unity Foundation of La Porte County
Bill Stanczykiewicz, Senior Assistant Dean for External Relations; Clinical Associate Professor; Director, The Fund Raising School at Indiana University Lilly Family School of Philanthropy
Jenna Wachtmann, Vice President, Ball Brothers Foundation
*Keira Amstutz, President & CEO, Indiana Humanities
*Dr. Pete McCown, President, Community Foundation of Elkhart County

*IPA Foundation Board

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Faticia Brewer, President & Philanthropic Advisor, Brewer & Associates
Andrew Brock, CPA, Audit Manager, Blue & Company
Jill Carpenter, President & CEO, Community Foundation Alliance
Maria Fruth, CEO, Healthcare Foundation of La Porte
Eric Hessel, Vice President of Programs, Hendricks County Community Foundation
Arvetta Jideonwo, MHA, CFRE, Executive Director, CREA Foundation
Susan Johnson, Director of Operations and Grants Administration, Lumina Foundation
Marcy Minton, President, The Community Foundation of Muncie & Delaware County
Joel Moore, Financial Advisor, Merrill Lynch
Paige Sharp, Deputy Director of Programs, Indiana Arts Commission
Erin Trisler, Operations Director, The Clowes Fund
Vonnie Trumble, Program Officer, Community Foundation of Elkhart County

*IPA Foundation Board
IPA LEADERSHIP CIRCLE
A special thank you to the generous members of IPA’s Leadership Circle, whose contributions enhance IPA offerings to the benefit of everyone within our network.

- Community Foundation Alliance
- Community Foundation of Bloomington & Monroe County
- Community Foundation of DeKalb County
- Community Foundation of Elkhart County
- Community Foundation of Greater Fort Wayne
- Community Foundation of Noble County
- Community Foundation of Pulaski County
- Community Foundation of Randolph County
- Community Foundation of Whitley County
- Crosser Family Foundation
- Crown Point Community Foundation
- Decatur County Community Foundation
- Goelzer Investment Management
- Hamilton County Community Foundation
- Harrison County Community Foundation
- Healthcare Foundation of La Porte
- Heritage Fund - The Community Foundation of Bartholomew County
- Kappa Alpha Theta Foundation
- Jennings County Community Foundation
- K21 Health Foundation
- Kosciusko County Community Foundation
- LaGrange County Community Foundation
- Legacy Foundation
- Lilly Endowment Inc.
- Lumina Foundation
- Madison County Community Foundation
- Marshall County Community Foundation
- Nina Mason Pulliam Charitable Trust
- Northern Indiana Community Foundation
- Parke County Community Foundation
- Putnam County Community Foundation
- Richard M. Fairbanks Foundation
- Steuben County Community Foundation
- The Blue River Community Foundation
- The Indianapolis Foundation/Central Indiana Community Foundation
- Union County Foundation
- Unity Foundation of LaPorte County
- Western Indiana Community Foundation
- Zotec Foundation

IPA STAFF

- Claudia Cummings, President & CEO
- Holly Davis, Vice President of External Relations
- Amy Haacker, Vice President of Community Foundation Programs
- John Ferguson, Director of Member Programs
- Julie Markland, Program Associate
- Nick McLain, Communications Manager
- JoAnna Ness, Director of GIFT Programming
- Corri Rusk, Member Engagement Associate
- Lissa Silotto, Director of Communications & Marketing
- Maria Souza, GIFT Program Manager
- Marilee Steckler, Director of Office Operations

Congratulations, Marilee!
After almost 30 years of service, our dedicated and hard-working Director of Office Operations, Marilee Steckler, will be retiring in October. Marilee has served as the backbone of IPA, managing the organization’s operations, systems, and finances, all while providing friendly and helpful support to our membership.
Please help us wish Marilee the very best in her well-deserved retirement.
Preconference Activities

**TUESDAY SEPT. 27**  8:30 am to 11:30 am

**Trust-Based Philanthropy: Cultivating a Culture of Trust**
People think they know what trust-based philanthropy is—unrestricted grants and streamlined paperwork—but it’s actually much more. Through relationships based on transparency and mutual learning, power imbalances are addressed and a more equitable, impactful nonprofit sector is realized. Li, an early champion of trust-based philanthropy, will lead this mini-dive with Drew Black of the Arthur Dean Foundation and Jennifer Danic of Steuben County Community Foundation. They will take you through the process of creating a culture of trust and mutual accountability.

*Speakers: Philip Li, President & CEO, Robert Sterling Clark Foundation, @phipster, @RSClarkFdn; Drew Black, Director of Grantmaking, Arthur Dean Foundation; Jennifer Danic, President & CEO, Steuben County Community Foundation, @jenniferdanic, @SteubenCoCF*

**Depolarizing Within: Looking Inward & Changing Attitudes**
Ever find yourself feeling contempt for the “other side” of the political divide? You’re not alone. Political polarization is one of America’s most pervasive and serious problems—because of it, many of society’s problems go unresolved. Experts from Braver Angels, the preeminent national organization dedicated to bridging the partisan gap, will lead the session. You will walk away with new methods to engage politically without demonizing.

*Speakers: Lili Lutgens and Don Byrd, Braver Angels, @braverangels*

**Equitable Grantmaking in Practical Terms**
Equitable grantmaking is a buzzy term, but how do you apply it in the real world? Eric Weinheimer of Bank of America will guide you through his journey and the lessons he learned along the way. He will explore how internal DEI work creates a more equitable grantmaking process and the possibilities that open up as a result. No matter where you are on the DEI path, you will find value from this session. In addition to a panel discussion, there will be opportunities for engagement in activities and discussion.

*Speaker: Eric Weinheimer, Senior VP and Philanthropic Strategist, Bank of America, @BankofAmerica; Guadalupe Pimentel Solano, Community Leadership Officer, Central Indiana Community Foundation, @CICFoundation; Tracy Souza, President & CEO, Heritage Fund - The Community Foundation of Bartholomew County*

**Foundant Insider Scoop**
Whether you’re a new user or a long-time client, Foundant Technologies invites you to bring your software questions and find out how your peers are using their solutions to tackle the challenges of streamlining administrative tasks, building relationships with nonprofits and communities, and more. You’ll learn tips and tricks, review recent product releases, and get a sneak peek at what’s on the roadmap for future enhancements. Foundant also welcomes your product ideas and wants to learn how they can help you make philanthropy easier and more impactful.

*Speakers: Kevin Vahlbusch, Functional Consultant for Strategic Advancement; and Rosie Sprangers, Sales Engineer, Foundant, @Foundant*

**CICF, Cook Medical & Goodwill Impact Investing Site Visit**
See a great example of impact investing and multi-sector collaboration done right by visiting the new medical device manufacturing facility on Indianapolis’ east side. You will travel to the facility, a result of the combined effort of The Indianapolis Foundation, Cook Medical, IMPACT Central Indiana, and Goodwill Commercial Services, and learn how it came about and its benefits to the community. You’ll enjoy morning refreshments and learn from Indy Fresh owners Michael McFarland and Marckus Williams. You’ll also have the opportunity to meet plant workers and members of Goodwill’s mission team to hear their stories and experience on this exciting project.

*Speaker: Juanita Easterling, Director of Plant Operations, Goodwill of Central & Southern Indiana; Michael McFarland and Marckus William, Owners, Indy Fresh*

**Agape Therapeutic Riding Site Visit**
Interested in learning about a great organization while enjoying beautiful fall weather? This session is for you. Did we mention you’ll get to ‘horse around’ with elegant equines? You will explore the charming Greenfield grounds of Agape, where individuals with physical, emotional, cognitive, and social disabilities receive horse-assisted learning and therapy programs. You will see why horses are great teachers—and much more.
**Tuesday, Sept. 27**

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<th>TIME &amp; LOCATION</th>
<th>EVENT</th>
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<tr>
<td>10:00 am</td>
<td><strong>REGISTRATION OPENS</strong></td>
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<td>12:00 pm to 1:45 pm</td>
<td><strong>OPENING LUNCHEON &amp; KEYNOTE</strong></td>
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<td><strong>CAPITOL</strong></td>
<td><strong>Philanthropy’s Role in Supporting Sustainable Local News</strong></td>
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<td>Foundations and philanthropists across the country are coming to realize a healthy community and functional democracy depend heavily on local news and civic information. Whether you want to improve community safety, raise awareness about clean water, increase civic participation, or any number of other initiatives, quality local news can help. Do you have a role to play in its future? Learn how philanthropy can support local news in Indiana from the Knight Foundation’s in-house journalism guru. <strong>Keynote:</strong> Jim Brady, Vice President, Journalism, Knight Foundation, @jimbrady <strong>Opening Remarks:</strong> Claudia Cummings, President &amp; CEO, IPA, @INPhilanthropy</td>
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<td>1:45 pm to 2:15 pm</td>
<td><strong>NETWORKING BREAK</strong></td>
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<td><strong>CAPITOL I</strong></td>
<td><strong>Impact Investments: Affordable Housing in Small Communities</strong></td>
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<td>Addressing affordable housing and substandard housing issues often come with complications that slow progress. Learn how the Healthcare Foundation of LaPorte took on a leadership role in affordable housing and created the path to change. This session will discuss approaches to generating board engagement, the development of a comprehensive housing plan, and the establishment of a dedicated housing committee. <strong>Speakers:</strong> Debby Kasemeyer, Director of Community Development and Investments, Northern Trust, @NorthernTrust; Maria Fruth, CEO, Healthcare Foundation of La Porte, @hflaporte; Lance Dorn, Senior Vice President, SB Friedman Development Advisors, @LanceDorn; Michele Magnuson, Vice Chair, Board of Directors, Healthcare Foundation of La Porte</td>
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<td><strong>CAPITOL III</strong></td>
<td><strong>Increasing Civility, Pluralism, and Social Cohesion</strong></td>
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<td>It’s no secret that America is experiencing a period of toxic division. Although most funders seek to find common ground on complex community issues, is coming together even possible in these times? PACE’s Kristin Cambell will show you the role philanthropy can play in combating polarization and dehumanization and creating better social cohesion, civility, and pluralism. <strong>Speaker:</strong> Kristin Cambell, CEO, Philanthropy for Active Civic Engagement (PACE), @kcambell, @PACEfunders</td>
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<td><strong>CAUCUS/CABINET</strong></td>
<td><strong>‘More than Money’ Philanthropy—Digital Access for All</strong></td>
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<td>Live the role of a digital navigator and see how philanthropy can be a catalyst for digital access in grade-level reading, public housing authorities, telehealth/teletherapy, seniors, veterans and local technology strategic plans. Cheri Coryea, respected consultant for The Patterson Foundation, will share cookies and a recipe—for how ‘More than Money’ Philanthropy can advance digital access for all in your community. <strong>Speaker:</strong> Cheri Coryea, Initiative Manager, The Patterson Foundation, @chericoryea, @ThePattersonFdn</td>
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<td><strong>CAUCUS/CABINET</strong></td>
<td><strong>The Power of Purpose: How Social Impact Drives Business Results</strong></td>
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<td>This lively and hands-on discussion will examine the intersection of social impact and business results. Attendees will walk away with a better understanding of how and why social impact drives business results, how ESG is impacting corporate philanthropy, and how collaboration between businesses and grantmakers can create value for all stakeholders. <strong>Speaker:</strong> Dora Lutz, Founder &amp; CEO, GivingSpring, @LutzDora</td>
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<td>3:30 pm to 4:00 pm</td>
<td><strong>NETWORKING BREAK</strong></td>
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TUESDAY, SEPT. 27

TIME & LOCATION

4:00 pm to 5:15 pm

CONCURRENT SESSIONS

COUNCIL/CHAMBER

Agency Funds: Avoiding Pitfalls and Maximizing the Opportunity

Examine Agency Funds—both the development opportunities they provide and the complexities in managing them—in this interview-style session featuring experts and practitioners. While these funds can build community capacity and engage new donors, there is also the potential for problems if your organization lacks proper accounting procedures and recordkeeping. You’ll leave the session with a better understanding of how to avoid those pitfalls and maximize the benefits of these important tools.

Speakers: Amy Haacker, Vice President of Community Foundation Programs, IPA; Sheryl Aikman, Consultant, Ekstrom Alley Clontz & Associates, @sheryl_aikman; Patrick Burkey, Estep Burkey Simmons, @EBSCPA; Mary Gibble, President & CEO, Hancock County Community Foundation, @HancockCountyCF

CAUCUS/CABINET

Cybersecurity Risk Management

Are you worried about cybersecurity? Welcome to the club. It is one of the fastest growing concerns in the philanthropy sector. As our world becomes increasingly virtual, it is even more critical to protect donor and organizational information. The pros at Blue & Company will take you through the important issues in cybersecurity and ensure you’re fully prepared to operate safely in today’s virtual environment.

Speakers: Andrew Brock, Audit Manager - CPA, and Tom Skoog, Cybersecurity and Data Management Practice Leader, Blue & Co., @Blue_CPA

CAPITOL III

Getting to the Roots of Community Engagement

Strong roots make strong communities. Explore effective grassroots philanthropy from those that live their lives on the ground. Community experts stand ready to share creative strategies for deepening relationships among residents and philanthropic organizations.

Speakers: Valerie Davis, Community Ambassador, Central Indiana Community Foundation, @CICFoundation; De’Amon Harges, Faculty, Asset Based Community Development (ABCD) Institute, @rovinglistener

CAPITOL I

ESG Investing: Strategies for Using it to Your Organization’s Advantage

The ESG (Environmental, Social, and Governance) landscape is changing. This interactive panel discussion will dive into the basics of ESG as a set of standards for a company’s behavior used by socially conscious investors and explore ESG investing specifically in greater detail. Professionals from Goelzer Investment Management will share their experiences relating to best practices for incorporating ESG into your portfolio as well as your organization; what your donors are really trying to accomplish; and how you can take strategic advantage of ESG within your organization.

Speakers: Janet S. Sweet, CFA, CAIA, Senior Consultant Institutional Advisory Services; Helena Ocampo, Senior ESG Portfolio Manager; Adrian Miller, CFA, Senior Wealth Advisor Family Office; Chris W. Cotterill J.D., Chief Operating Officer, @ChrisWCotterill; Goelzer Investment Management, @GoelzerInc
Wednesday, Sept. 28

TIME & LOCATION

6:30 am to 7:00 am
HUDNUT COMMONS

Wake Up Yoga by Blackbaud
Meet 10 minutes prior in the lobby to walk over Hudnut Commons.

Instructor: Tracy Souza, President & CEO of Heritage Fund - The Community Foundation of Bartholomew County

7:45 am to 8:45 am

Networking Breakfast
Start your day right by joining colleagues to share a meal, compare notes, and connect on your work.

9:00 am to 10:00 am
CAPITOL

Keynote

Three Social Trends Shaping American Philanthropy

Numerous philanthropic reform proposals are currently being promoted at the national level. But more fundamentally, three major social trends promise to re-shape the context and practice of American giving. Rising wealth disparity is creating both massive new buckets of money and a shrinking middle class. Fewer and fewer individuals live in supportive communities that promote human flourishing. And the dramatic rise of the religiously unaffiliated is likely to depres what Americans give and volunteer. Jeremy Beer will address these challenges and suggest how leaders in today’s philanthropic sector might respond to them.

Keynote: Jeremy Beer, Host of Givers, Doers, and Thinkers Podcast, Philanthropy Daily, @AmPhilanthropic
Emcee: Jenna Wachtmann, Vice President, Ball Brothers Foundation

10:15 am to 11:30 am
CAPITOL

Concurrent Sessions

Regulatory Proposals That Could Change Philanthropy

Join this panel to consider further potential impacts of issues presented in the keynote given by Jeremy Beer. The major philanthropic reform proposals being considered nationally—the curtailment of donor privacy, increased private foundation payout requirements, restrictions on donor-advised funds, and more—will be discussed. The all-star panel, moderated by IPA President & CEO Claudia Cummings, will provide more context and detail on the proposed reforms, which could threaten endowments and the survival of philanthropy as a whole.

Speakers: Jeremy Beer, Host of Givers, Doers, and Thinkers Podcast, Philanthropy Daily, @AmPhilanthropic; Jorge Castro, Miller & Chevalier Chartered; Sandra Swirski, Founder, Integer, @IntegerPolicy; Claudia Cummings, President & CEO, IPA, @INPhilanthropy

Caucus

Auditing Your Audit

Auditing doesn’t have to be painful—really. Accounting firm CapinCrouse will provide you with strategies to manage the external auditing process and show you concrete steps to achieve a pain-free audit relationship with the firm looking over your books. They will also apprise you of upcoming changes in auditing standards and their best-practice suggestions for effective implementation.

Speaker: Chris DuKate, Partner, and Nathan Davis, Senior Manager, CapinCrouse LLP, @CapinCrouse

Chamber

Increasing Social Impact Through Employee Engagement

The workplace is transforming. Instead of being based in the office, hybrid work models are more common. Hierarchical, top-down decisions are fading in favor of greater employee input. Organizations are pressured to be good social and environmental stewards. The power of the individual to bring about change has never been greater. Explore the current landscape where business and society are colliding—corporate advocacy, employee intrapreneurism, and emerging service and volunteer models are just a few examples—and learn how to activate you and your employees as a force for good.

Speaker: Danielle Holly, Associate Director of Learning Programs, Aspen Institute, @dholly8, @AspenInstitute

Concurrent Sessions Continued on Next Page
WEDNESDAY, SEPT. 28

TIME & LOCATION

10:15 am to 11:30 am
CABINET

**Leading from Where You Are**
No matter your role or experience, there are always opportunities to lead. Join the founder of Accent on Business, Ellen Dunnigan, to discover how to step into your own leadership, manage up, and thrive in your current role by being both intentional and influential.

*Speaker: Ellen Dunnigan, Founder, Accent on Business, @edunnigan, @PublicSpeakIndy*

COUNCIL

**The Art & Science of Making People Care**
In these times of widespread divisions over issues, it can be hard to get people to care about your issue in a way that resonates and drives them to act—but it’s far from impossible. Join Francesca Jarosz Brady, strategic communications extraordinaire, to learn the process her firm, VOX Global, uses to get into the hearts and minds of audiences. Using case studies from her work with Indiana organizations, she will provide you a playbook on how to reach the right audience and develop messages that cut through the noise.

*Speakers: Francesca Jarosz Brady, Senior Vice President, Vox Global, @VOXGlobal*

11:30 am to 12:00 pm NETWORKING BREAK

12:00 pm to 1:00 pm CAPITOL

**AWARDS LUNCH**
Settle in with an appetizing lunch as we celebrate the 2022 Legislator of the Year and Hazelett Award for Leadership in Grantmaking, which is proudly presented by Ekstrom Alley Clontz & Associates.

*Emcee: Rich Haddad, President & CEO, K21 Health Foundation*

1:00 pm to 1:30 pm NETWORKING BREAK

1:30 pm to 5:00 pm CAPITOL

**EXHIBITOR IDEA EXCHANGE**
There’s more than tasty dessert, cool swag, and sponsor gifts waiting for you at this lively event. You’ll find solutions from top advisors and companies specializing in investment management, software solutions, philanthropic council, and more.

**PRO-TIP:** Complete your prize passport for a chance to win gifts from our generous sponsors!

1:30 pm to 4:45 pm

**QUICK HITS**
In between gathering solutions at the Idea Exchange, choose your own adventure with one or more 45-minute Quick Hits. Speakers and descriptions are provided on the following page.

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QUICK HITS: What Funders Need to Know About...

**Arts, Culture & Creativity:** Arts and creativity fuel vibrant places to live. They also strengthen communities in surprising ways. Learn more about those positive outcomes, brainstorm what you envision for your own communities, and discuss innovative ways philanthropy can be involved.

*Speakers: Miah Michaelsen, Executive Director, @MiahMichaelsen; and Paige Sharp, Deputy Director of Programs, Indiana Arts Commission, @INArtsComm*

**Early Childhood Education:** Support of high-quality early childhood education is one of the most impactful—and most financially sound—community investments. Since 2004, PNC has championed early childhood education through PNC Grow Up Great, a multi-faceted initiative that provides tools and resources to help develop curious young minds. This session explores the power of focused philanthropy and its impact on national and statewide early learning opportunities that help set children—and their communities—on a path to success.

*Speakers: Jeanine Fahnestock, SVP, PNC Grow Up Great; Maureen Weber, President & CEO, Early Learning Indiana, @EarlyLearningIN; Andrew Perrin, Regional Sales Executive, Treasury Management, PNC Bank, National Association, @PNCBank*

**Environmental Sustainability:** Environmental sustainability is key to the future of a healthy and thriving Indiana. Discover how environmental issues such as climate change, clean energy, and clean tech are inextricably linked to public health, workforce, education, equity, and many other traditional areas of focus for funders. It should not be viewed as a single isolated issue, but rather as a root-cause approach to increasing the quality of life for all Hoosiers.

*Speaker: Stephanie Goodrid Lawson, Executive Director, McKinney Family Foundation, @McKinneyFamily4; Clayton De Fur, Director of Family Philanthropy, Herbert Simon Family Foundation, Central Indiana Community Foundation, @CICFoundation*

**Equity, Inclusion & Opportunity:** Karrah Herring offers practical advice on how to approach topics of equity, inclusion, and opportunity that foster healthy internal dialogue and promote understanding and growth within your organization and in the communities you serve.

*Speaker: Karrah Herring, J.D., Chief Equity, Inclusion & Opportunity Officer, State of Indiana, Office of the Governor of Indiana*

**Grantee Perspective:** A lot of attention these days is being directed at how foundations can help to navigate and lessen the power dynamics between grantmakers and grantees. As grantmakers, it can be easy for us to forget what it’s like to be on the other side of the table—to be asking for funds. In this panel-style discussion, you’ll hear honest feedback from nonprofit leaders about what it’s like to work with funders. They’ll answer questions like: What are the specific hallmarks of a great relationship with a funder? Have grantees seen a shift in the power dynamics? What frustrates grantees most? What do grantmakers do that grantees love... or hate? We’ll also save time for dialogue, so bring your questions!

*Speakers: Jenna Wachtmann, Vice President, Ball Brothers Foundation, @jwachtmann; Julie Henson, Vice President of Development, Coburn Place, @CoburnPlace; Clark Lienemann, President, Mary Rigg Neighborhood Center*

**Housing:** Housing is a vital ingredient in community development and quality of life for all Hoosiers. Join an exceptional panel of experts and practitioners to explore current trends and innovation in housing and comprehensive community development. Discover ways to increase your impact, begin or expand your efforts around sustainable housing support, or become more familiar with the reasons behind why stable, affordable housing is an essential element of any successful community development endeavor.

*Speakers: Amandula Anderson, Managing Director, Real Estate Solutions-Indiana IFF, @AndersonSquad; Steven Meyer, CEO, Intend Indiana, @IntendIndiana; Stephanie Overbey, CEO, Kosciusko County Community Foundation, @KosCoCommFdn*

**Public Health:** Public health protects and improves the health of people where they live, work, and play through prevention and large-scale solutions. Dr. Paul Halverson, founding dean of the Richard M. Fairbanks School of Public Health, will share the latest challenges and opportunities within public health and how grantmakers play a vital role in the pursuit of prevention and policy that benefits all people and builds a healthier Indiana.

*Speaker: Dr. Paul Halverson, Founding Dean and Professor, IU Richard M. Fairbanks School of Public Health, @FSPH_IU*

**Workforce:** Bill Turner has engaged in Indiana’s workforce system from every vantage point—employer, school board member, workforce development official, and now, philanthropy executive. He will use those experiences to distill the complexities of the federal, state, and local government infrastructure into the top facts a funder needs to know about how they work. Key data that illuminates intervention opportunities will be shared. Bill will also discuss his observations about how funders might impactfully engage in the workforce ecosystem.

*Speaker: William D. Turner, Chief Program Delivery Officer, The John & Mary R. Markle Foundation*
Philanthropy Leads Dinner

INDIANA ROOF BALLROOM
ADVANCE REGISTRATION REQUIRED

5:30 pm   REGISTRATION OPENS
6:00 pm   RECEPTION
7:00 pm to 9:00 pm   DINNER & PROGRAM

Enjoy the enchanting view at the Indiana Roof Ballroom for the Philanthropy Leads Dinner with a fireside chat on mental health by Indiana Governor Eric Holcomb and Kalen Jackson, Indianapolis Colts vice chair, owner, and philanthropist.

Fireside Chat on Mental Health: One in five U.S. adults—including one in four Hoosiers—suffer from some form of mental health disorder. The need is huge and philanthropy is engaging more than ever in the fight for awareness, treatment, and prevention. The fireside chat with Holcomb and Jackson, moderated by IPA CEO Claudia Cummings, includes a conversation on how the Colts and the Irsay family are dedicating their resources to attack the mental health disorder epidemic through its Kicking the Stigma initiative, as well as efforts by the State of Indiana to meet the rising need.

This event celebrates graduates from the 2022 Mutz Philanthropic Leadership Institute with remarks from John Mutz, philanthropist and former Indiana Lt. Governor. Applications for the 2023 class are due Oct. 27, 2022.

Meet IPA’s Mutz Philanthropic Leadership Institute 2022 Class:

Whitney Amuchastegui, Su Casa
Abbie Bush, Indiana Bar Foundation
Abigail Coleman, Johnson, Grossnickle and Associates (JGA)
Lucy Dold, Community Foundation of White County
Michele Dole, Key Bank
Johnnie Edwards, NAACP of Bartholomew County
Juan Galeano, The Clowes Fund
Alison Gerardot, Community Foundation of Greater Fort Wayne
Hannah Giere, Community Health Network Foundation
De’Niece Harrison-Hudson, OneAmerica
Charlotte Hawthorne, Eli Lilly and Company, Lilly Foundation
Steve Holwerda, EdChoice

Karissa Hulse, IU Health Foundation
Danka Klein, Union County Foundation
Amber Ewing Kostoff, School on Wheels
Catherine Lockhart, AES Indiana
Jonathon Maple, Margaret Mary Health Foundation
Kami Nielsen, Richard M. Fairbanks Foundation
Dani Rich, Don Wood Foundation
Lauren Rochester, Ivy Tech Foundation
Larry Smith, Fathers and Families Center
Ruth Stone, CDO Consulting Group
Amy Streator, Ripley County Community Foundation

INPHILANTHROPY.ORG/MUTZ

APPLICATIONS OPEN!
Thursday, Sept. 29

TIME & LOCATION

6:30 am to 7:00 am
HUDNUT COMMONS

WAKE UP YOGA BY BLACKBAUD
Meet 10 minutes prior in the lobby to walk over to Hudnut Commons.

Instructor: Tracy Souza, President & CEO of Heritage Fund - The Community Foundation of Bartholomew County

7:45 am to 8:45 am
CAPITOL

NETWORKING BREAKFAST CELEBRATING YOUTH PHILANTHROPY
Join us as we lift up the incredible generosity and value of youth philanthropy.

9:00 am to 10:15 am
CAPITOL I

CONCURRENT SESSIONS

Addressing the Complexities of Poverty: A Case Study of Collaboration

Multi-sector collaboration presents exciting possibilities. Learn about the public-private-philanthropic partnership that built a new manufacturing facility on Indy’s northeast side. The $15 million facility, which seeks to employ up to 200 area residents, is owned by Central Indiana Community Foundation, operated by Goodwill of Central & Southern Indiana, and produces medical devices for Cook Medical. The employees work for Goodwill, which provides wraparound services such as mental and physical health support, substance use support, soft skills training, and housing stabilization for those in need. A new Eskenazi Health facility is being erected next door, providing services for low-income citizens. Plus, an on-site grocery store helps the food-insecure neighborhood. A study from IU’s Public Policy Institute estimated the plant would have annual economic impact of nearly $26 million for Marion County.

Speakers: Gretchen Gutman, Vice President of Public Policy, Cook Medical, @gretchengutman, @CookMedical; Richard Haddad, President & CEO, K21 Health Foundation; Tom Kilian, Jr., President, Hamilton County Community Foundation, @HamCoCF, @CICFoundation; Kent Kramer, President & CEO, Goodwill of Central & Southern Indiana, @GoodwillIKAK

Effective Investment/Finance Committee Management

Foundation and endowment portfolio management takes significant time and effort. Whether your organization uses external investment consultants or internal committees to handle the funds, portfolio decisions must be made with care. Investment/finance committee members are fiduciaries and thus are responsible for key policy and portfolio management decisions. This panel consists of three committee chairs and an investment consultant discussing effective committee best practices, and you will leave with plenty of knowledge that is relevant to other committees, too.

Speakers: Andy Hendricks, Finance Committee Chair, Wabash Valley Community Foundation, @WVCFoundation; Todd Jacobs, Chief Financial Officer, AWS Foundation, @AWSFound; Will Thorpe, Chief Marketing and Development Officer, Institutional Division, Mason Investment Advisory Services, @MasonInvests; Steve Yeager, Finance and Investment Committee Chair, Kosciusko County Community Foundation, @KosCoCommFdtn

CONCURRENT SESSIONS CONTINUED ON NEXT PAGE
THURSDAY, SEPT. 29

TIME & LOCATION

9:00 am to 10:15 am
CAPITOL III

Reimagining Capacity Building

Capacity building is critical to impactful grantmaking. Traditional models of capacity building, however, don’t always account for culture, systems, and power in its design. By not fully assessing assumptions and values, equity principles fall by the wayside and capacity building instead reinforces patterns of harm in the communities we intend to benefit. Join this session to learn from GEO’s latest work on Reimagining Capacity Building, which examines principles for centering equity in our capacity building efforts. They will share how inequities can show up and offer steps to address and mitigate them. You’ll also learn from local leaders in the field and begin applying the concepts to your own capacity-building strategy.

Speakers: Jaser Alsharhan, Director of Programs, Grantmakers for Effective Organizations, @GEOfunders; Kelly Anoe, President & CEO, Legacy Foundation, @kelly_anoe, @legacyfdn; Eric Hessel, Vice President of Programs, Hendricks County Community Foundation; Mareeha Niaz, Director of Programs, Grantmakers for Effective Organizations, @GEOfunders

COUNCIL/CHAMBER

Using Data to Drive Change

Are you ever overwhelmed by data? Do you lack the valuable data that would show your organization’s impact? Let the #DataNerds at Transform Consulting Group show you how they use data to demonstrate impact and optimize decision-making. You’ll see how data turns to dollars for TCG’s clients across the country and what it looks like for your organization to become data-informed. You’ll leave with more knowledge on using data as an asset to shape your next steps.

Speaker: Amanda Lopez, President, Transform Consulting Group, @AmandaLopezIN, @AboutTransform

10:15 am to 10:45 am
NETWORKING BREAK

10:45 am to 12:00 pm
CONCURRENT SESSIONS

CAPITOL I

Board Engagement Through a Leadership Lens

Organizations with active boards tend to be highly effective. Learn how to engage your board of directors with evidence-based practices from Bill Stanczykiewicz, no stranger to boards in his long career in the public, private, and philanthropic sectors. Examples from fellow IPA members, including the Huntington County Community Foundation and Don Wood Foundation, will show you how to put those practices into action at your foundation.

Speakers: Bill Stanczykiewicz, Sr. Assistant Dean for External Relations and Clinical Associate Professor, IU Lilly Family School of Philanthropy, @_billstan, @IUPhilanthropy; Laura Macknick, Executive Director, Don Wood Foundation, @laurammacknick; John Niedereman, Board Member, Huntington County Community Foundation

COUNCIL/CHAMBER

Mission Align 360

Take a full-circle look at Mission Align 360, a process to examine an organization’s capital from every vantage point—human, financial, and philanthropic—to strengthen mission alignment and maximize impact. While the approach doesn't suggest that 100% of an organization’s assets must always be optimally aligned, it does provide a framework to thoughtfully and diligently consider how an organization’s capital pools are deployed on a regular basis. This session takes you through case studies to see how Mission Align 360 is used in practice.

Speaker: Craig Styles, Vice President & Chief Operating Officer, Morgan Stanley, @MorganStanley
CAUCUS/CABINET

**Stories that Connect Us**

When done well, stories are a powerful way to connect. They can drive us to act, build community trust, and create a deeper understanding of our work’s impact. So how do you tell a story well? In this session, Well Done Marketing will help you become a better storytelling organization, walking you through the elements of an amazing story and the best way to share them in presentations, email newsletters, and digital platforms.

*Speakers: Lisa Vielee, President, @lisavielee, Well Done Marketing; Anne Wolfcale, Senior Writer, Well Done Marketing, @welldonemktg*

CAPITOL III

**Surviving the Great Resignation**

Many organizations have been affected by the Great Resignation. John Qualls, founder of Purpose HQ, will lead you through the macro trends that brought us to this workforce challenge. You’ll complete an exercise to take stock of any “purpose gaps” that you or your organization may have, leaving the session with knowledge that can help align your purpose with roles and mission.

*Speaker: John Qualls, President, Purpose HQ*

12:00 pm to 12:30 pm

**NETWORKING BREAK**

12:30 pm to 2:30 pm

LUNCH KEYNOTE & CLOSING REMARKS

**How to Change the World When the World Keeps Changing**

Does constant change have you feeling overwhelmed, exhausted, and unsure how to plan ahead? As a philanthropist, you want to create a dramatic impact with your giving. But you can’t do that by clinging to misguided beliefs and delusional practices, or by feeling paralyzed by constant change and uncertainty. Join global philanthropy advisor and award-winning author Kris Putnam-Walkerly to learn how to shed anxiety about the future so you can do the most good possible right now. She’ll share practical tips from her new book, *Delusional Altruism*, to help you create a powerful plan, even in radically uncertain times. So you can stop playing crisis whack-a-mole, and instead focus on what truly matters.

*Keynote: Kris Putnam-Walkerly, Award-Winning Author, Global Philanthropic Advisor, @Philanthropy411
Emcee: Stephanie Overbey, CEO, Kosciusko County Community Foundation*

That’s a wrap!

*Thank you for all that you do to make life better for people and communities in Indiana and beyond.*

Help us improve future events by taking our survey.
Generosity, empowered.
Humanity, lifted.