

2019 Legislative Roundtables

SUMMARY OF NINE REGIONAL CONVENINGS FOR INDIANA PHILANTHROPY AND LAWMAKERS



Champion. Support. Connect.

Overview

Advocacy helps the philanthropic sector advance its mission, increase its funding sources, and solve both community and societal problems. That is why advocacy is a key component of Indiana Philanthropy Alliance's (IPA) mission. We believe developing relationships and effective collaborations with policymakers will help all sectors work together to build a better quality of life for individuals and families across Indiana and beyond.

To that end, in 2019, IPA hosted nine legislative roundtables across the state.

Our goals were simple:

1. Further our members' relationships with their elected officials
2. Educate our elected officials about what foundations do and how we can work together to create long-lasting change in our communities
3. Identify key issues in our communities, and begin talking about ways to move them forward

IPA's nine legislative roundtables convened 187 community leaders, including 153 staff representing 87 IPA member organizations, 21 state legislators, and 13 congressional staff.

Shared Priorities

While all communities in Indiana are unique, it came as no surprise that all regions are dealing with similar challenges and that these challenges are connected to the overall health of the communities and their residents:

1. **EDUCATION:** There was a universal call from the philanthropic field to continue to work to improve education in Indiana. Teacher pay and shortages were a major concern, as was access to early childhood and Pre-K programs.
2. **WORKFORCE DEVELOPMENT:** Connect classrooms with careers that don't require college, increase STEM education, mentoring, and reaching students early about career planning. Philanthropy would like to see more tools, like post-graduation scholarships, to help attract and retain talent.
3. **SUBSTANCE ABUSE/MENTAL HEALTH ISSUES:** Addressing the opioid crisis, the stigma of addiction, and the availability of treatment programs, as well as increased resources for mental health, particularly in schools.
4. **COMMUNITY DEVELOPMENT/QUALITY OF PLACE:** There is an increasing gap between income levels, which can lead to rural vs. urban issues. Moving forward, we must determine what philanthropy's role is in solving these problems, and how we can work strategically with policymakers and the private sector.
5. **ACCESS TO BROADBAND INTERNET:** Many rural areas are struggling to find a solution.

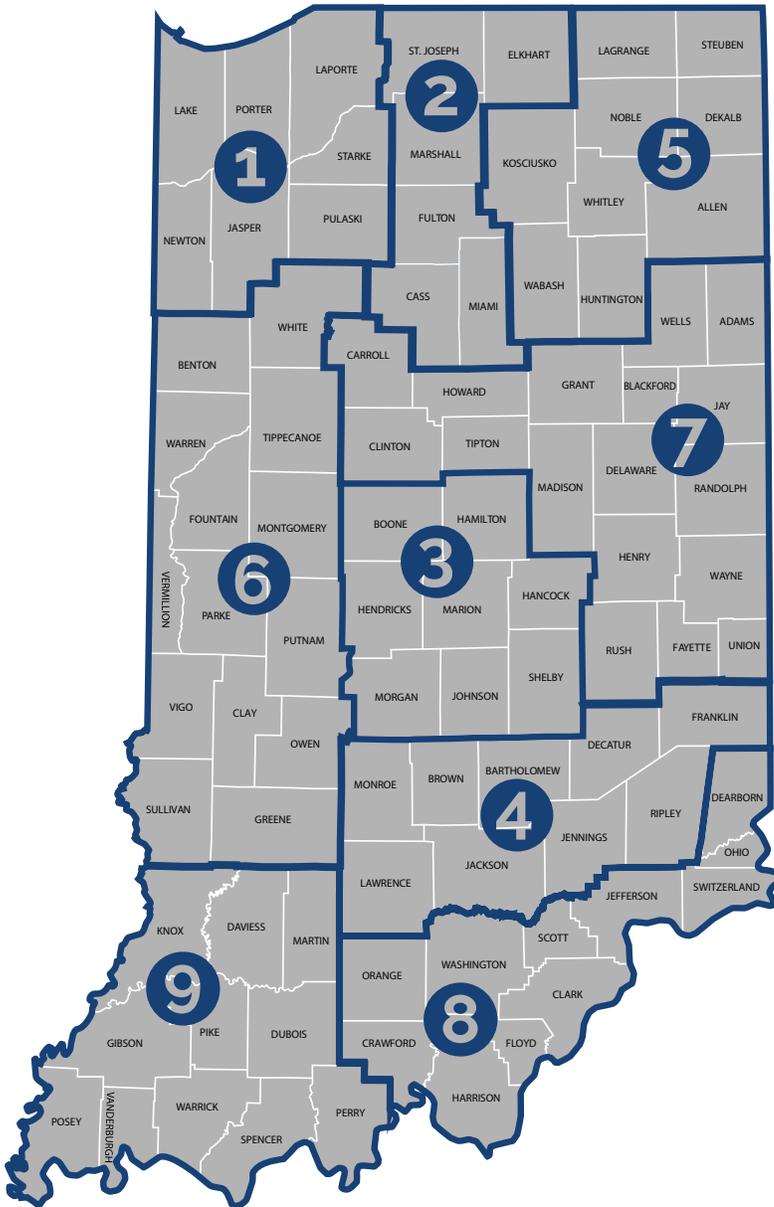
Overall Observations & Feedback

1. There must be regular interaction between philanthropists (neutral experts) and legislators to create innovative ideas and approaches to problems.
2. Philanthropy can play a role as a convener for all points of view, especially on contentious issues.
3. Philanthropy can do research and provide data.
4. IPA must educate legislators AND IPA members.
5. IPA can play a leadership role in understanding key issues, and pass that knowledge on to members.
6. Philanthropy must determine how it can work strategically to close the funding gap on critical issues.
7. Philanthropy can help build bridges between government, education, and the private sector.
8. Philanthropy needs to help nonprofits that work on key issues by helping them build capacity.
9. Philanthropy must not let legislators solve these problems alone.
10. Philanthropy must consider legislators a critical audience.
11. Philanthropy can begin to convene and discuss needs assessments in regions around the state.
12. Philanthropy can research best practices.
13. Philanthropy must work on developing the next generation of effective leaders and encouraging civic engagement.
14. IPA is in a unique position to aggregate information, convene around issues, and provide best practices and data.

IPA will consider these observations as we continue to develop and grow our advocacy program and public policy agenda. IPA will continue to offer these opportunities to connect members and policymakers. The association also wants to work with members to focus on how philanthropy can meet specific community challenges.

If you have questions, comments, and concerns, please contact Holly M. Davis, Vice President of Public Affairs and External Relations, at hdavis@inphilanthropy.org or 317.630.5200, Ext. 117.

Regions and Roundtable Locations



- 1** | **JUNE 27 | NORTHWEST REGION**
 Legacy Foundation, 370 E. 84th Dr. #100,
 Merrillville, IN 46410
- 2** | **JULY 31 | NORTH CENTRAL REGION**
 Marshall County Community Foundation,
 2701 N. Michigan St., Plymouth, IN 46563
- 3** | **AUGUST 19 | CENTRAL REGION**
 United Way of Central Indiana, 2955 N.
 Meridian St. #300, Indianapolis, IN 46208
- 4** | **SEPTEMBER 4 | SOUTH CENTRAL REGION**
 Faurecia Clean Mobility, Tech Center, 950 W
 450 S, Columbus, IN 47201
- 5** | **SEPTEMBER 17 | NORTHEAST REGION**
 Fort Wayne Country Club, 5221 Covington Rd.,
 Fort Wayne, IN 46804
- 6** | **SEPTEMBER 20 | WEST CENTRAL REGION**
 Wabash Valley Community Foundation, 200 S.
 8th St., Terre Haute, IN 47807
- 7** | **SEPTEMBER 23 | EAST CENTRAL**
 First Merchants Bank, 200 E. Jackson St.,
 Community Room, Muncie, IN 47305
- 8** | **OCTOBER 16 | SOUTHEAST REGION**
 Ivy Tech Community College, 8204 CR 311,
 Sellersburg, IN 47172
- 9** | **OCTOBER 21 | SOUTHWEST REGION**
 Old National Bank, Blue and Gold Room,
 One Main Street, Evansville, IN 47708

Northwest Region

JUNE 27 | ROUNDTABLE HOST:

Legacy Foundation, 370 E. 84th Dr. #100,
Merrillville, IN 46410



"People feel like they are not cared for, and philanthropy works to care for people."

MAGGI SPARTZ, UNITY FOUNDATION OF
LAPORTE COUNTY

SUMMARY Education and workforce issues were top of mind for IPA members in Northwest Indiana. Members discussed the connection between college degree numbers and attracting high paying jobs. Additionally, they talked about the importance of funding quality-of-place efforts in attracting and retaining talent.

Access to quality food is a particular challenge in many areas in the region. Members are working to fund food pantries, farmer's markets, and to address hunger amongst college students in the area. Poverty and violent crime are major concerns.

A diverse attainable housing stock and transportation issues for the commuter areas is an issue for the area, and representatives from the federal offices shared legislative efforts to combat barriers.



Call to Action

Legislators asked philanthropy to help get the word out about graduation pathways and changes to graduation requirements.

Top Topics Discussed

1. Education
2. Workforce development
3. Food insecurity and deserts
4. Housing
5. Transportation

Additional Discussions

1. Indiana Dunes' recent designation as a National Park is bringing increased tourism to the region
2. Opportunity zones, like an East Chicago old chemical site
3. Changing industries and the need to produce strategically, not just for the sake of making more
4. A fair and accurate Census count

North Central Region

JULY 31 | ROUNDTABLE HOST:

Marshall County Community Foundation,
2701 N. Michigan St., Plymouth, IN 46563



"Jails have become our mental health facilities."

STATE REPRESENTATIVE JACK JORDAN (HD17)

SUMMARY IPA members across the state universally mentioned the importance of quality educational offerings in their areas. Of particular note in north central Indiana were issues around low teacher wages and shortages, access to Early Childhood Education/pre-K, and transportation to school.

Many IPA members were engaged in active community leadership, bringing school systems together with government and business leaders in an effort to secure a 21st Century Talent Region Designation.

IPA members expressed concern about the increased need to help people detox and stay clean, citing a connection between mental illness, jails, and the opioid crisis.

Members were interested in partnering with government for funding for enhanced quality-of-life projects and programs, including the arts, civic dialogue, and culture, as well as infrastructure.



Call to Action

Legislators asked philanthropy to partner with them to explore solutions beyond using jails for mental health and addiction services in the area.

Top Topics Discussed

1. Education: teacher pay, teacher shortages, and access to early childhood programs
2. Substance misuse disorder
3. Mental health programs
4. Criminal justice reform
5. Quality of place

Additional Discussions

1. Diversity and inclusion: helping to connect people (women, people of color, Hispanics) with capital
2. Immigration
3. Tax deduction and charitable giving: members asked IPA to do a survey to see how and if the tax bill was impacting giving in Indiana
4. Donor-advised funds
5. Steel tariffs and the effects on Elkhart County; 30% loss in RV industry

Central Region

AUGUST 19 | ROUNDTABLE HOST:

United Way of Central Indiana, 2955 N.
Meridian St. #300, Indianapolis, IN 46208



"It's extraordinarily expensive to be poor."

KATHLEEN LARA, PROSPERITY INDIANA

SUMMARY IPA members from central Indiana worked in small groups with legislators to talk through their areas of interest and issues of concern.

Workforce Development issues were top of mind. Some areas are growing, but low-wage jobs make it difficult to find workers, and rising home costs contribute to many people feeling priced out of the market. Members made strong cases of linking food to health to housing to transportation to education and workforce, with all of the issues intersecting.

Many members work with grantees around issues of food deserts and insecurity, and many expressed a lack of knowledge about options and the stigmas attached to asking for help. Members talked about a need for good data from governmental agencies to support their work.

Members discussed the challenge of payday lending, a particular problem in the urban areas of the state where there are a higher concentration of lenders accused of predatory practices. Legislators discussed policy remedies and members offered alternatives, such as credit unions and community loans issued by nonprofits as possible solutions.

Poverty was an overarching theme of many conversations, including multi-generational poverty. Members asked the elected officials to collaborate with them on community development efforts.



Call to Action

Legislators challenged philanthropy to engage in policy efforts more and educate legislators on community challenges. Additionally, legislators asked philanthropy to encourage voter and census participation.

Top Topics Discussed

1. Workforce Development
2. Education
3. Food insecurity
4. High cost of poverty
5. Health

Additional Topics Discussed

1. Infrastructure around Indianapolis
2. Mental health offering, including in rural areas, K-12 schools
3. Increase knowledge of social programs for those in need
4. Civic participation

South Central Region

SEPTEMBER 4 | **ROUNDTABLE HOST:**

Faurecia Clean Mobility, Tech Center, 950 W
450 S, Columbus, IN 47201

*"We will be helping all kids by
elevating our facilities and the quality."*

DAN DAVIS, PRESIDENT/CEO OF THE COMMUNITY
FOUNDATION OF JACKSON COUNTY

*"Philanthropy serves as the venture
capital for community challenges."*

CLAUDIA CUMMINGS, IPA CEO

SUMMARY Access to quality early childhood education dominated the conversation in Columbus. Members reported that parental and working requirements hurt participation. The process is cumbersome, so streamlining intake process would help. It can be hard to contact all families. IPA members made a link to greater workforce development issues and the need to look at ways to share benefits, facilities, or discounts (on utilities, etc.) to increase the number of quality child care sites.

Many communities in this region cited the social determinants of health related to poverty as a focus of their grant making. They also reported a major housing shortage in some of the areas, with difficulties in attracting builders to meet the demand.

Access to broadband was another major concern in the mostly rural area, and members reported back on various studies that have been done.

IPA members shared that community foundations help to seed many community initiatives but need additional resources to sustain the projects.



Call to Action

The legislators asked philanthropy to collaborate so as to not overlap funding in one area to the exclusion of other challenges.

Top Topics Discussed

1. Access to early childhood education and programs
2. Workforce development
3. Health
4. Access to broadband internet
5. Housing

Additional Discussions

1. Point of sale septic tank inspections place an additional burden on homeowners in rural areas
2. How a lack of zoning laws create funding gaps for housing
3. Use of creative financing to support entrepreneurship, workforce, and quality of place initiatives
4. Quality of place: Leveraging community assets to attract new talent to their regions (examples: state parks, art districts)

Northeast Region

SEPTEMBER 17 | ROUNDTABLE HOST:
Fort Wayne Country Club, 5221 Covington Rd.,
Fort Wayne, IN 46804



SUMMARY With the northeast region encompassing the state's second largest city surrounded by many rural counties, the conversation varied greatly.

In and around Fort Wayne, obesity linked to food deserts, a high infant mortality rate, and attracting and compensating good teachers were major concerns, as was access to childcare, particularly for student-parents where a lack of child care is a barrier to continuing their educations. To reduce obesity and benefit the community, one health-focused foundation suggested an increase to the State's food voucher system.

In the more rural counties, access to broadband internet was a challenge, as was workforce development, quality of place issues, and leadership pipelines. Demographically, IPA members reported aging populations and the challenges their communities faced filling jobs, providing healthcare, and offering attainable housing. Members discussed with legislators ways to attract talent to their areas, with post-graduation scholarships and scholarships that incentivize neglected job paths.

Access to quality early childhood education facilities and programs was discussed at every table. IPA members reported that barriers to participation, a lack of quality facilities and providers, and transportation all played roles in keeping needy children from participating.



Call to Action

The legislators asked philanthropy to engage in supporting legislative efforts to expand early childhood education access.

Top Topics Discussed

1. Education: teacher pay, access to early childhood programs
2. Workforce development
3. Access to broadband internet
4. Aging populations
5. Quality child care facilities

Additional Topics Discussed

1. Raising the minimum age to purchase vaping products
2. GIFT 7 proposals
3. Food access and insecurity: efforts educate around better food options, incentives to reduce obesity.
4. Zoning and its role in redeveloping small towns
5. Transportation

West Central Region

SEPTEMBER 20 | ROUNDTABLE HOST:
Wabash Valley Community Foundation, 200 S.
8th St., Terre Haute, IN 47807



"It's pretty clear through evidence-based research that early childhood learning helps kids."

STATE SENATOR JON FORD (R-TERRE HAUTE)

SUMMARY Like all the regions across the state, education was a top issue for the west central region. Members shared local experiences with access and funding of pre-k programs. They also shared frustrations with testing to measure education standards and the disconnect between the school testing scores and the innovative programs the local schools are delivering.

Almost as prominent in the discussion was the topic of substance abuse and recovery options in the area. Members reported community members needed support beyond what government services programs provide, particularly kinship care (families taking care of kids) happening outside the system.

Additionally, IPA members shared concerns about a lack of affordable housing stock, difficulties getting reimbursements from state agencies, and issues related to aging populations.

There was a robust discussion around quality of place, the need to attract more people to the rural areas, and the community development projects intended to augment quality of life. Programs work supports the arts, trails, and culture were shared.

IPA members shared with the Federal staffers the need for a policy remedy for IRA rollover to Donor Advised Funds, an education credit (similar to college tax credit), and varied gifts.



Call to Action

Legislators sought input from philanthropy on where there were backlogs in state reimbursement payments and encouraged IPA members to stay in contact to work in tandem.

Top Topics Discussed

1. Education: access to early childhood programs, frustrations with testing
2. Substance misuse disorder
3. Housing
4. Quality of place issues
5. Support for families caring for children

Additional Topics Discussed

1. Domestic violence intervention needs
2. Temporary Assistance for Needy Families (TANF): looking at updates to the program
3. Higher education and the need for investments in universities
4. Access to broadband is needed in rural areas

East Central Region

SEPTEMBER 23 | **ROUNDTABLE HOST:**

First Merchants Bank, 200 E. Jackson St.,
Community Room, Muncie, IN 47305

“Having someone collectively watching the legislation on behalf of your industry is very important, watching for unintended consequences. Advocacy is incredibly important. What you do as a nonprofit and a foundation is incredibly important.”

STATE SENATOR JEFF RAATZ (R-RICHMOND)

SUMMARY IPA members were concerned that On My Way pre-k seats were going unfilled. There is not a consistent way to measure kindergarten readiness, but members feel a need to catch children early enough to change the trajectory of their lives. They want to find something backed by data that can be utilized across communities. They are also concerned about the increasing demands on teachers. IPA members are looking at staffing challenges for schools to fund guidance counselors, as well as funding professional development in math and reading.

Poverty in the area was a major concern and various groups have organized to discuss solutions. Upward mobility can be difficult because there is a risk of losing benefits as people pull themselves up. Poverty is tied to healthcare, especially access to prenatal care, but also mental health. Like many regions, substance abuse is a major challenge and members want better criminal justice reforms to help with re-entry and recovery. Muncie, in particular, reported struggling with the state regulations around clearing a house contaminated by meth production and use.

IPA members care a lot about quality-of-place and are funding the creation of parks and trails. They expressed concern over the on-going maintenance costs.

Members talked with federal staffers about the need for a policy remedy around Donor Advised Funds—because 100% of the funds stay in the community, it is difficult when DAFs are lumped in with other financial service products. The Jobs Cuts and Tax Act of 2017 is having unintended consequences as it pertains to charitable giving.



Call to Action

Legislators asked that philanthropy help to provide feedback to determine the unintended consequences of policies.

Top Topics Discussed

1. Access to early childhood education
2. Mental health professionals in schools
3. Poverty
4. Substance use disorder
5. Quality of place issues

Additional Discussions

1. Land banks issues
2. Members in the area are working on 21st Century Talent Region designation
3. Members would like to utilize post-graduation/reverse scholarships as a tool to bring people back to the area
4. The need for broadband in the region is a top concern
5. Transportation and infrastructure to connect rural areas

Southeast Region

OCTOBER 16 | ROUNDTABLE HOST:
Ivy Tech Community College, 8204 CR 311,
Sellersburg, IN 47172

*"One of the roles
philanthropy should play
is to provide continuity.
Philanthropy has the ability
to create a hierarchy of
needs diagram to keep
public officials on task."*
STATE REPRESENTATIVE ED CLERE
(R-NEW ALBANY)

SUMMARY After education, access to broadband dominated the conversation for our members in the Southeast region. Members shared stories of how they felt this impeded many of their funding priorities—education chief among them, but also workforce development and quality-of-place.

Members sought policy relief for scholarships designed to pay back student loans for graduates as a way of attracting them back to the smaller communities. At present, the scholarships are taxed as income.

Substance abuse and mental health was a major concern for many of our members across the southeast region, and they shared how they were working to support alternatives to jailing in their counties.

On the federal level, members wanted to see charitable deductions for all and a change in law regarding Donor Advised Funds.



Call to Action

The legislators asked philanthropy to engage in supporting legislative efforts to expand broadband access.

Top Topics Discussed

1. Education
2. Access to broadband internet
3. Workforce development
4. Substance misuse disorders
5. Mental health issues

Additional Discussion

1. Riverboat casino funds that currently fund many community projects may be reduced as gaming opens up around the state
2. Align Southern Indiana: a five county effort to address overarching goals around quality-of-place issues
3. Additional training for teachers in dyslexia methods
4. Tourism efforts as an economic development issue
5. Housing stock in growing areas a concern

Southwest Region

OCTOBER 21 | **ROUNDTABLE HOST:**

Old National Bank, Blue and Gold Room,
One Main Street, Evansville, IN 47708

"This state doesn't work without your work."

STATE REPRESENTATIVE RYAN HATFIELD (DISTRICT 77)

SUMMARY There was a large focus on workforce development and the social determinants of health as IPA members gathered in Evansville for the southwest roundtable.

Many members support efforts to expand mental health resources in their communities, both in the schools and generally for members of the greater communities. Several members cite the work of local nonprofit YouthFirst in working to combat suicide clusters, but expressed access to mental health should not be a partisan issue.

Broadband access is a major problem in southwest Indiana and IPA members made the connection of how a lack of high speed internet impacts the changing delivery of education.

Members spoke holistically about education from early childhood through adult education and how it impacts the quality of life and the workforce pool in their area. Amongst the corporate members in the room, supporting technical and vocational training to meet their workforce needs is a priority.

Collaboration with faith-based organizations to meet nonprofit capacity was a theme of several members' comments, especially as it pertains to systems change work. Human service nonprofits are overwhelmed and need to work with government to find better solutions.

Additionally, members explained to legislators how issues of mobility, healthcare, and basic needs feed into having healthy communities. With Indiana having challenges in these areas, employers are finding it difficult to compete with states nearby when trying to attract a competitive workforce.

The conversation also turned global, with both IPA members and the State Representatives talking about the impact of climate change, the wealth gap, and the national debt on future generations.

On the federal level, all participants in the legislative discussion were interested in how the federal Tax Cuts & Jobs Act of 2017 is impacting charitable giving. Some expressed a desire for tax credits for gifts to endowments made through the community foundations and a repeal of the UBIT.



Call to Action

The legislators asked philanthropy to engage with them in healthcare transparency efforts, which will be a major topic for the 2020 legislative session.

Top Topics Discussed

1. Workforce development
2. Social determinants of health
3. Education
4. Access to broadband internet
5. Protecting the environment

Additional Topics Discussed

1. Scholarships: the expense of continuing education beyond high school
2. Child care: increase access and quality, hours of operation for students, shift workers
3. Financial literacy: Working on education for initiatives that benefit low income households
4. Community safety. Creating opportunities for officers to bond with the general public as well as children
5. Transportation and infrastructure to connect rural areas

Attendees Representing Philanthropy

- ArcelorMittal
- AT&T
- AWS Foundation
- Ball Brothers Foundation
- BP - Whiting IN
- Brown County Community Foundation
- Bussing-Koch Foundation
- Central Indiana Community Foundation
- Community Foundation Alliance
- Community Foundation of Bloomington & Monroe County
- Community Foundation of Boone County
- Community Foundation of Crawford County
- Community Foundation of DeKalb County
- Community Foundation of Elkhart County
- Community Foundation of Grant County
- Community Foundation of Greater Fort Wayne
- Community Foundation of Jackson County
- Community Foundation of Morgan County
- Community Foundation of Muncie & Delaware County
- Community Foundation of Noble County
- Community Foundation of Randolph County
- Community Foundation of Southern Indiana
- Community Foundation of St. Joseph County
- Community Foundation of Whitley County
- Crown Point Community Foundation
- EdChoice
- Evansville Police Department Foundation
- Faurecia
- Foellinger Foundation
- Franklin County Community Foundation
- Fulton County Community Foundation
- George and Frances Ball Foundation
- Greene County Foundation
- Hamilton Center Foundation
- Harrison County Community Foundation
- Hendricks County Community Foundation
- Heritage Fund - The Community Foundation of Bartholomew County
- Huntington County Community Foundation
- Indiana Humanities
- Ivy Tech Foundation
- Junior League of Indianapolis
- Koch Foundation
- Kosciusko County Community Foundation
- Legacy Foundation
- Marshall County Community Foundation
- McKinney Family Foundation
- Nina Mason Pulliam Charitable Trust
- Ohio County Community Foundation
- Old National Bank Foundation
- Owen County Community Foundation
- Parke County Community Foundation
- Prosperity Indiana
- Public Education Foundation of Evansville
- Richard M. Fairbanks Foundation
- St. Joseph Community Health Foundation
- Thomas P. Miller and Associates
- TLG Solutions
- Toyota Motor Manufacturing, Indiana
- Unity Foundation of LaPorte County
- Vectren Foundation
- Wabash Valley Community Foundation
- Warren County Community Foundation
- Washington County Community Foundation
- Wayne County, Indiana, Foundation
- Welborn Baptist Foundation
- Western Indiana Community Foundation
- Westside Leadership Academy