



Indiana  
Philanthropy  
Alliance



# PHILANTHROPY LEADS CONFERENCE

PRESENTED BY

**GOELZER**  
INVESTMENT MANAGEMENT

**Since we were last together in 2018...**



# ...A Lot Has Changed

**154**

EVENTS in 2022

**2X** MORE than 2018

**2.6k**

EVENT PARTICIPANTS in 2022

**2X** MORE than 2018

**19%**

MORE MEMBERS  
SINCE 2018

**97%** 

RECOMMEND IPA  
ACCORDING TO MEMBER  
SURVEY RESPONDENTS



# IPA 2020-24 Strategic Planning Process



- 8 focus groups across Indiana, 125 participants
- Survey of 200+
- National best practice research
- Board/Staff study visit to best-in-class Michigan Council of Foundations
- Board to refined and finalized plan



Indiana Philanthropy Alliance Convenes Regional Funders in Muncie



IPA CEO Claudia Cummings leads a discussion of regional philanthropists. Photo by: Mike Rhodes

# Strategic Planning Stakeholder Priorities

1. Collaboration across sectors
2. Improve grantee success
3. Curate information from the field
4. Provide professional development
5. Advocate for issues
6. Promote the industry
7. Diversify and expand membership
8. Provide thought leadership
9. Develop a talent pipeline for staff and boards
10. Execute original research

# Strategic Plan Pillars



## **INSPIRE**

forward thinking innovation and action by curating, modeling, and sharing effective ideas and practices.



## **EMPOWER**

members through professional development and education.



## **ENGAGE**

members and communities through collaboration and convening to address key, common, and regional issues that affect their work.



## **AMPLIFY**

the voice of Indiana's philanthropic sector by promoting the impact of philanthropy as well as advocating for and engaging members in public policy issues of importance to the sector and the communities it serves.



## **ENHANCE**

IPA's capacity and effectiveness to achieve its mission.

# Issue Collaboratives

**Move the needle by working  
across sectors.**

Improve outcomes by collaborating with  
cross-sector partners on key issues of  
importance to communities you support.

Health Disparities

Workforce Development



# Sector News

**Keep your finger on the pulse of philanthropy.**

IPA Weekly gives you distilled, quick-read national and local news from our sector delivered to your inbox every Monday.



## **STATEHOUSE NEWS**

Get updates on state and federal legislation impacting you

## **MEMBER NEWS**

Send your press releases and story ideas to [news@inphilanthropy.org](mailto:news@inphilanthropy.org)

## **STAFF UPDATES**

Tell IPA about your new hires and board placements





# Public Policy & Advocacy

IPA DEFENDS  
**DAFs & PRIVATE  
FOUNDATIONS**

IPA TESTIFIES IN SUPPORT OF  
**BROADBAND  
ACCESS**

IPA JOINS COALITION FOR  
**EARLY  
CHILDHOOD  
EDUCATION**

STATEHOUSE NEWS  
FOUNDATIONS ON THE HILL  
DAY AT THE STATEHOUSE  
LEGISLATIVE ROUNDTABLES

# Peer Communities

**Build lasting relationships  
and crowdsource ideas.**

Find camaraderie by connecting with peers who share your job role or responsibilities. Crowdsource ideas from our vast network in real time with group emails/listservs.

Communications

Community Foundation Interns (CFI)

Corporate

Development

Finance

Indiana Blacks in Philanthropy

Professional Advisors

Program Officers

Young Leaders

Youth Philanthropy



“[The CFI Summit] made me realize just how much the philanthropic sector can help local communities.”

—CF INTERN

# Entry Level Talent Pipeline

## CFI CAREER RETENTION STRATEGY

PURPOSE, OPPORTUNITY,  
CAMARADERIE, MENTORSHIP

94

INTERNS JOINED 2021 &  
2022 NETWORKING &  
LEARNING EVENTS

## EMPLOYMENT REFERRALS

CONNECTION TO PERMANENT  
EMPLOYMENT IN PHILANTHROPY



# MUTZ PHILANTHROPIC LEADERSHIP INSTITUTE

**47** CLASS MEMBERS  
in 2 Years

**3** CLASS MEMBER  
NEWLY APPOINTED AS  
PHILANTHROPY  
EXECUTIVE

“We are making life-  
changing connections.”

—CLASS MEMBER

## Executive Talent Pipeline

# Staff

## MEMBER SERVICES



Holly Davis



John Ferguson



Julie Markland



Corri Rusk

## GIFT TECHNICAL ASSISTANCE



Amy Haacker



JoAnna Ness



Maria Souza

## OPERATIONS



Marilee Steckler



Lissa Silotto



Nick McLain



Claudia Cummings  
President & CEO

**GOELZER**  
INVESTMENT MANAGEMENT





Indiana  
Philanthropy  
Alliance



# PHILANTHROPY LEADS CONFERENCE

PRESENTED BY

**GOELZER**  
INVESTMENT MANAGEMENT

# PHILANTHROPY'S ROLE IN SUPPORTING SUSTAINABLE LOCAL NEWS

JIM BRADY, KNIGHT FOUNDATION





Indiana  
Philanthropy  
Alliance



# PHILANTHROPY LEADS CONFERENCE

PRESENTED BY

**GOELZER**  
INVESTMENT MANAGEMENT