

Central Indiana Corporate Partnership

2019 | ANNUAL REPORT



AgriNovus
INDIANA



BioCrossroads®



Ascend
INDIANA



CONEXUS
INDIANA



ESN®
ENERGY SYSTEMS NETWORK

TECHPOINT

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LETTER FROM THE PRESIDENT



If we had a theme for the year, it would be: ambition. I could argue that it's been an underlying theme of our organization since its inception, but the word "ambition" seems especially applicable to 2019.

We celebrated two decades of transformative work for the Central Indiana region, and beyond, this year. CICP started in 1999 from ambitious beginnings, stemming from a call to action to have an economic development strategy for the 21st century drawing on our leading industrial strengths and, appropriately, ranging beyond sports after the NCAA provided the ultimate validation of that decades-long Indianapolis focus by moving its headquarters here from Kansas City.

Forethought, collaboration and hard work by our talented professional team, our engaged business and civic leaders, our committed philanthropic community and our impressive academic institutions have come together, in forming CICP, to provide a foundation to advance prosperity for the Central Indiana region—a foundation that is also reaching to other areas across the state.

In addition to highly productive and game-changing work by our six talent and industry sector initiatives, CICP itself, as an organization nationally recognized for unique leadership engagement and effectiveness, has also delivered tremendous impact. We listen to our members and find opportunities that answer their needs. Examples include:

- **A more comprehensive and employer-responsive workforce strategy that led to the formation of Ascend Indiana;**
- **A signature placemaking strategy that led to the formation of 16 Tech;**
- **Innovation strategies that led to the formation of the Indiana Biosciences Research Institute and the Indiana Innovation Institute (IN3);**
- **Inclusive economic development strategies via the 2018 *Advancing Opportunity in Indiana* study by the Brookings Institution that led to decisions by a number of our employers to revisit and address employee needs for wages that could more realistically make ends meet and more opportunities to grow those wages through participation in workplace-based skill development. This same study, and CICP's work to inform the public with its findings, similarly led the City of Indianapolis to revisit traditional economic development incentive strategies and develop a realistic and responsive approach to incentivizing promising jobs through a new Inclusive Incentives Program.**

As the organization continues our influential work, drawing upon expert studies and access to deep data resources to promote concrete outcomes, CICP continues to find new and better ways to drive our mission of "transforming the economy of Indiana to create a sustainable prosperity and quality of life for our citizens and future generations." 2019 was marked with the initiation of two first-of-their-kind projects.

We are embarking on an ambitious (the largest project of its kind for us, the state, and the researchers involved) multi-dimensional project: a major study of Indiana's economy and workforce, examined on a regional basis and designed to focus business priorities, inform public policymakers and spur intentional growth across the entire state of Indiana—all made possible thanks to the generosity of a grant from Lilly Endowment Inc.

The *Indiana GPS Study - Growth and Prosperity for the State* has already begun and will continue to be carried out over

the year ahead by the Brookings Institution's Metropolitan Policy Program and the American Enterprise Institute, a collaborative team of undisputed national experts. (See more on page 4). Completion is expected at the end of 2020, and CICIP and its partners will share findings broadly by engaging public, business and community leaders from all regions and sectors across the state.

In 2019, we also charted new territory by creating the first-ever legislative forum where both legislators and governor's office staff came together in an all-day session. *Investing in Indiana's Future: A Legislative Leadership Summit* focused on many of the topics that are included in the Indiana GPS Study. (See more on page 7).

On the operations side of CICIP, our deeply engaged Board of Directors Chair Jack Phillips moved to a new professional opportunity outside Roche Diagnostics, and transitioned the role of CICIP Board Chair into the very capable hands of Connie Bond Stuart, PNC regional president of Central and Southern Indiana. We are grateful to Connie for her commitment and leadership—and for her willingness to take on this additional role at such an important time. Connie has been a member of the CICIP board since 2011, and more recently, served as a member of CICIP's Executive Committee and as our treasurer. She is passionate about creating opportunities and growth for the Central Indiana region, and her experience and collaborative spirit will guide us well. And new for 2020, we have added Gail Boudreaux, president and CEO, Anthem; Jeff Harrison, president and CEO, Citizens Energy Group; and Tom Linebarger, chairman and CEO, Cummins to our Executive Committee. Our Board membership continues to diversify as well. We added new members: Lenex Steel, Telamon, Elanco, Butler University and Jobvite, all which will bring—and we hope, will also find—great value in the work and programs of CICIP and our branded initiatives.

The year also brought changes for two of our initiatives and their leadership. In June, my successor to BioCrossroads was named, and we welcomed Patty Martin as president and CEO. She is a veteran life sciences and community leader, and was most recently at Eli Lilly and Company as chief operating officer for Lilly Diabetes and Lilly's chief diversity officer. In

the fall, AgriNovus Indiana President and CEO Beth Bechdol was confirmed by the United Nations to be the deputy director general of the Food and Agriculture Organization, which is a tremendous honor for her and illustrative of her great work here advancing Indiana's agbiosciences industry. AgriNovus and its many partners will continue to move Beth's strategies forward. A leadership transition is expected in the first part of 2020.

I've said it before, but it is worth repeating: CICIP is unique and special. Our corporate structure, the quality of our board membership, the strength and generosity of our diverse sources of financial support, and the energy behind our many collaborations and essential projects is unparalleled anywhere else in the United States. Our initiatives are thriving and finding new ways to support their various industry sectors, as well as one another.

For CICIP, 2020 will definitely be a transformative year in more ways than just its visionary number. Our team of nearly 100 professionals will be moving to Innovation Building 1, the first building in the 16 Tech Innovation District, in July. Being in an innovative new space, in an innovative new community, in close quarters with other creative and talented people will undoubtedly bring many new opportunities through our daily work and interactions with one another and with the broader community—and will, I'm sure, lead to even more promising collaborations and ideas.

We look forward to a productive and energizing year ahead—and to working with you to help us ensure that ambitious plans do indeed continue to turn into real opportunities.

Sincerely,



David L. Johnson
President and CEO
Central Indiana Corporate Partnership

2019 marked another milestone year for the Central Indiana Corporate Partnership (CICP), both in its history and in its work.



Central Indiana Corporate Partnership

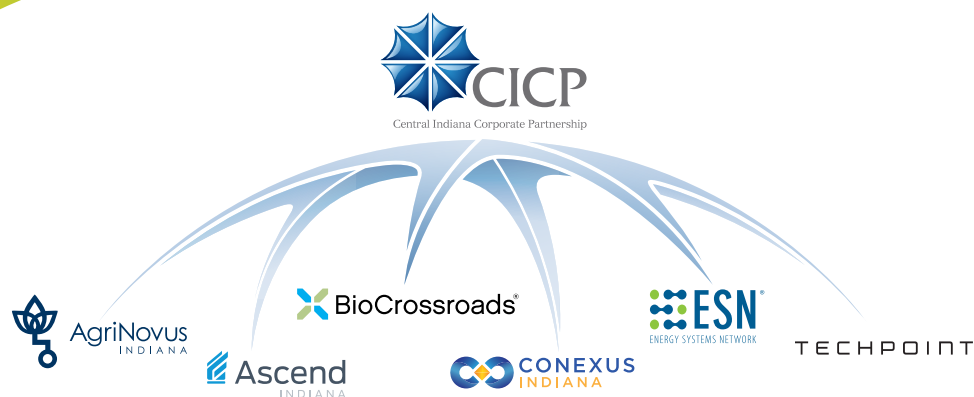
The organization celebrated its 20th anniversary, with some reflection on why it was established and the impact that it has had over two decades. At the August board meeting, CICP Founders Clay Robbins, chairman, president and CEO of Lilly Endowment Inc., and Sallie Rowland, chairman emerita, Rowland Design, Inc., along with early board member Jeff Smulyan, chairman and CEO of Emmis Communications, all shared insights on the originating ideas and early development of CICP, as well as their thoughts on the success and future of the organization.

While CICP reflects on its history and the deep legacy of its work, it also has a sharp focus on the future and, in particular, a visionary project that spreads to all borders of Indiana, the *Indiana GPS Project – Growth and Prosperity in the State*. Made possible through a grant from Lilly Endowment Inc., CICP is leading a multi-dimensional study of Indiana's economy designed to focus business priorities and spur intentional growth across the entire state of Indiana. Brookings Institution's Metropolitan Policy Program and the American Enterprise Institute will synthesize past research and present insights, provide authoritative new data and analysis, and offer actionable recommendations for inclusive progress on a statewide scale, including:

- **Indiana's advanced industries**
- **Future economic growth trends**
- **Workforce and talent implications**
- **Demographic analysis of Indiana**
- **Community and civic life survey**
- **Economic growth and inclusion for Indiana's Opportunity Zones**

While the study will include data from all 92 Indiana counties, eleven regions have been identified for focus groups and listening sessions, all to ensure that regional and community leaders are heard and regionally based strategies are considered. Many of CICP's partner regions in this effort are aligned with already existing regional development authorities and Regional Cities designations.

The first listening and information gathering sessions for the study were convened in the Northern Region (South Bend, Mishawaka and Elkhart) and the Northeast Region (greater Fort Wayne area) in November. CICP will engage, on several occasions, with the other nine regions across the state and expects the final report to be complete at the end of 2020.



BOARD MEMBER SESSIONS

CICP sessions and meetings included discussions with Indy Chamber President Michael Huber regarding the Amazon HQ2 process and how being a top 20 finalist has bolstered and encouraged the region's economic development strategy. Indiana Economic Development Corporation

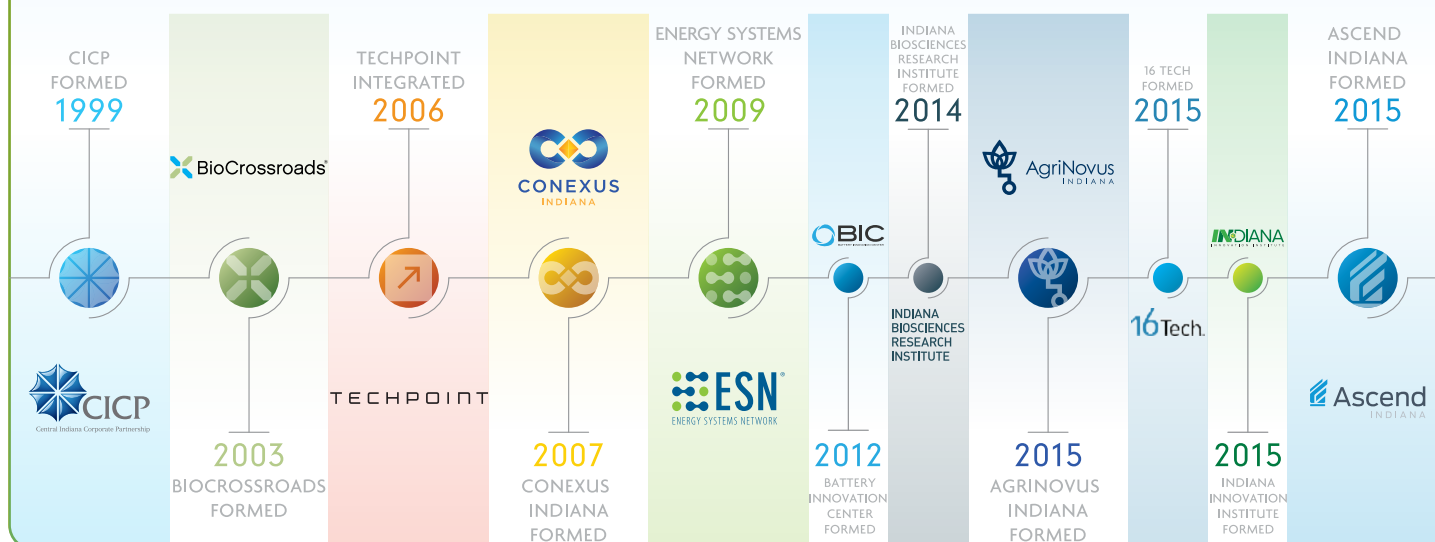
President Elaine Bedel; Mark Muro from the Brookings Institution; and Jim Ryan, CEO of Old National Bank and in his leadership role for the Southwest Indiana Regional Development Committee, all shared learnings from their work with CICP members.

CICP Celebrates 20 Years

From two staff members in 1999 to nearly 100 talented professionals working with 65 board members at the end of 2019, CICP has created six talent and industry sector initiatives and three spin-out enterprises (including an entire innovation district at 16 Tech in downtown Indianapolis). CICP has also driven dozens of projects and programs, scores of reports, hundreds of events, and thousands of people who have connected to CICP's mission and influence. CICP's many and

successful efforts to advance regional prosperity have all been made possible through the continued support of our members, the engagement of our partners in state and local government, and especially, the generosity of Lilly Endowment Inc.

CICP will continue its important work on projects and strategies that encourage inclusive growth in industry, talent and innovation over the decade ahead.



16Tech[®]



The 16 Tech Innovation District hit several milestones throughout the year. Among the highlights: Innovation Building One is under roof and on schedule to be CICIP's new home in July 2020. Plans for the Innovation Hub, the former Citizens Energy Group headquarters, were finalized and funded at year end, and the facility will be ready to emerge late in 2020 as an innovation hub, makerspace and artisan market. And the 16 Tech Community Investment Fund was launched at an event in November. The fund will start making competitive grants to worthy community projects that support residents in the Near West, Near Northwest and surrounding neighborhoods in 2020.



LEGISLATIVE SESSION

On October 30, CICP hosted a first-of-its-kind session where 45 members of the Indiana General Assembly and governor's staff gathered for a day-long session with discussions from experts and industry leaders on the future of Indiana's advanced industries; the case for regional development; workforce development opportunities and concerns; and the future of healthcare in an unhealthy state. Ryan Streeter, director of domestic policy studies, American Enterprise Institute, led a discussion on regionalism and the importance of placemaking.



The Indiana Innovation Institute (IN3), established in 2017 with significant funding from Lilly Endowment Inc., is an organization that works with academia, industry, and government to create a hub of national security innovation that helps solve critical defense priorities. In 2019, IN3 welcomed new President and CEO Stephen E. Kelly to lead this important initiative. Kelly brings great depth of defense industry experience to the organization. IN3 was asked to play an integral role in a number of key projects including Governor Holcomb's bold new defense sector strategy and will help lead Naval Surface Warfare Center Crane's NavalX Midwest Tech Bridge, where it will foster collaboration among universities, industry and government to bring new technologies to the warfighter.

As part of their talent efforts, IN3 held the first reverse engineering/ cybersecurity HackIN hackathon attracting nearly 100 students from across the state.





AgriNovus INDIANA

AgriNovus Indiana's priorities to elevate and grow the agbiosciences were on full display throughout 2019. It is clear that a statewide awareness of the agbiosciences has emerged that is both relevant and impactful. Opportunities to support future talent and entrepreneurs have not gone unnoticed by the public, private, and non-profit sector leaders capable

of driving positive and purposeful action, potentially spurring even greater impact.

To achieve these priorities, AgriNovus is continuing its focus on promoting and advancing the sector through public education and awareness, building a 21st century agbiosciences workforce, researching and identifying the growth opportunities to build a robust entrepreneurial ecosystem, and by developing strategic collaborations among partners to promote innovation.

To retain and increase that growth in the agbiosciences sector, AgriNovus will use a two-year, \$3.6 million grant from Lilly Endowment Inc. to support those efforts.



AMPLIFY THE AG+BIO+SCIENCE STORY



AgriNovus continued to share the Ag+Bio+Science story in several new or refreshed efforts. In 2019, there was record-setting attendance at the Agbioscience Innovation Summit, which focused on building a talent pipeline for the agbiosciences, showcasing agbioscience entrepreneurs, and a discussion on how to continue to make Indiana the place to be for the agbiosciences.

The Indiana is Ag+Bio+Science podcast, which featured leaders in the agbiosciences including Elaine Bedel, then president of the Indiana Economic Development Corporation; Mark Poeschl, CEO of National FFA; Luca Bonini, CEO of Italtapollina; Karen Plaut, dean of the College of Agriculture for Purdue University; Rajan Gajaria, executive vice president for Business Platforms at Corteva Agriscience; and many more. The podcast continued to attract listeners throughout the year.

In partnership with the Indiana Economic Development Corporation (IEDC) and Forbes, the Forbes AgTech Summit – Indianapolis came back to the state bringing together global leaders in technology and agriculture to tackle critical challenges to our food supply.



BUILD WORLD-CLASS TALENT



The Blue Room partnership between National FFA, Microsoft and AgriNovus continued with increasingly impressive results. Over three days, 5,200 students and other visitors explored innovation and agbioscience jobs of the future in the Room.

A top priority of AgriNovus' talent strategy is the continued development of an agbioscience career discovery website called Field Atlas. The platform will allow high school and college students to explore the careers available in the agbiosciences. Field Atlas will launch in 2020.



TEAM AGRINOVUS



The AgriNovus team underwent a number of changes in 2019 and prepared for a transition of its leadership. In December, President and CEO Beth Bechdol was confirmed by the United Nations (UN) to be the deputy director general of the Food and Agriculture Organization (FAO). The AgriNovus Board of Directors began a national search for Bechdol's replacement, with a successor expected to be named in early 2020.

The AgriNovus team also expanded in 2019. Melissa Rekeweg, senior director of talent, and Tami Neighbors, Field Atlas manager, started their new roles. They joined the rest of the AgriNovus team (l-r): Tami Neighbors, Beth Bechdol, president and CEO; Melissa Rekeweg; Libby Fritz, director of communications and engagement; Bridget O'Reilly, digital media manager, and Dan Dawes, senior director of strategy and innovation.



CONNECT PEOPLE + ORGANIZATIONS



A new Ag+Bio+Science monthly series and "community convening," called QUADRANT, launched in 2019. The series is designed specifically to bring together intersecting and diverse professional "quadrants" such as Ag+Tech+Entrepreneur+Researcher. Five Quadrant programs were held in 2019 with attendance averaging 70 people per session.

The Indiana Economic Development Corporation (IEDC), Forbes and AgriNovus once again hosted an agbioscience industry promotion event during Indy 500 week to bring together a global audience to further showcase the Indiana agbioscience sector.



ACTIVATE ENTREPRENEURS



AgriNovus joined gener8tor to create an Indiana-based spotlight accelerator program called gBETA Agbioscience. Joining AgriNovus in the creation of this accelerator were Ag Alumni Seed, Beck's Hybrids and IEDC with the inaugural class including five agbioscience start-ups.

Increased innovation and start-up activities continue to positively impact the overall strength of the Indiana agbiosciences. In the spring, AgriNovus released The Entrepreneurial Ecosystem for Agbioscience in Indiana, a report with recommendations for support and infrastructure services. Recommendations included: building an entrepreneurial pipeline by hosting monthly convenings, accelerating entrepreneurs by attracting accelerators to the state, building showcases and innovation challenges for entrepreneurs, and developing a concierge service.





Ascend's vision is for Indiana to be a place of economic opportunity for all. To advance its vision, Ascend connects job seekers to career opportunities through the Ascend Network, provides strategic consulting to address labor market gaps through Ascend Services, and informs workforce research and public policy through thought leadership. Ascend is grateful for the support of many generous philanthropic funders, including the Richard M. Fairbanks Foundation and, especially, Lilly Endowment Inc.

Ascend Network

The Network is a tech-enabled strategy developed to more effectively connect students and recent graduates with an associate degree, bachelor's degree, or certificate to Indiana internships and jobs at scale. While the Network seeks to serve all students, it has a focus on supporting students from traditionally underrepresented backgrounds through the education-to-employment transition.



Since launching in late fall 2017, support for the Network has been tremendous, validating Ascend's unique approach to align talent with opportunities throughout the region.

330 employers have joined the Network to share their open roles with early-in-career talent, including Roche Diagnostics, OneAmerica, UnitedHealthOne, Indiana University Health, the State of Indiana, Kronos, and Big Brothers Big Sisters of Central Indiana

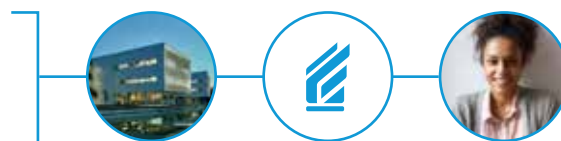
20 Indiana higher education institutions have joined the Network to support their students' job and internship searches, including Indiana University, Ivy Tech Community College, Butler University, and University of Indianapolis

1 formalized partnership with Independent Colleges of Indiana, laying the foundation for Ascend to connect students at 30 private, nonprofit colleges and universities with Indiana employers

6K one-on-one career exploration meetings have been held with students before onboarding them to the Network

10K applications have been submitted via the Network to open opportunities in Indiana

Through its Network and Services efforts, Ascend has connected over 1,000 individuals to work-based learning and job opportunities across the state.



Thought Leadership

Ascend utilizes the publication of research and policy briefs to educate stakeholders and public policymakers. In 2019, Ascend partnered with FutureWorks to prepare its second report analyzing the misalignment between open jobs and available talent in Indiana. Ascend's publications are available at ascendindiana.com.

SERVICES

Ascend Services

Services is a consulting practice that serves as an intermediary between organizations to align the preparation of talent with the knowledge and skills required by Indiana's current and future labor market. Services works with employers, higher education, and community organizations to build new talent pipelines and develop talent-focused strategic plans.

To date, Services has completed 16 projects and is currently working on 14 projects for partners such as Roche Diagnostics, UnitedHealth Group, 16 Tech, and United Negro College Fund. Services projects create shared value for employers, job seekers, higher education institutions, and the state of Indiana while increasing investment in workforce development-related efforts.

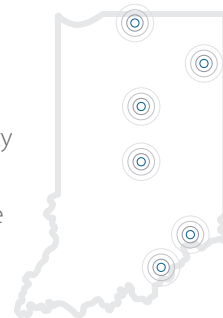
COMMUNITY BEHAVIORAL HEALTH ACADEMY

Community Health Network (CHNw) partnered with University of Indianapolis and Indiana University School of Social Work on a talent pipeline, which will yield up to 30 licensed clinical social workers annually who are dually licensed as clinical addiction counselors. Launched in February 2019, the program is enhancing the quality and availability of master's prepared social workers amidst the Indiana opioid epidemic, providing social work students with preparation to treat co-occurring substance use disorders and mental illness. The Academy's inaugural class enrolled 28 participants.

IVY TECH CAREER

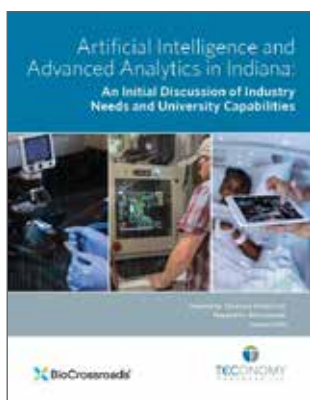
DEVELOPMENT TRANSFORMATION

After partnering in 2018 to redesign career development, Ivy Tech Community College (ITCC) engaged Ascend to support the initial implementation of the strategic plan. In 2019, Ascend worked alongside ITCC to select six campuses to pilot the new Career Coaching & Employer Connections (CCEC) initiative, began the capacity-building process at the pilot campuses, and fundraised against the required initiative budget. As pilot campuses begin to implement the new model in spring 2020 to serve nearly 10,000 students, Ascend will support the Central Office CCEC team in designing implementation plans and resources to guide employer engagement, work-based-learning experience development, career placement platform usage, career coaching, and the next round of campus selection. This joint effort has secured nearly \$11 million in grant funding to support initial implementation.





Indiana's life sciences industry keeps evolving, expanding, and making new discoveries. In 2019, companies made acquisitions and invested in their local footprints; new organizations moved operations to Indiana, adding hundreds of jobs and innovation to the landscape; and start-ups moved their products forward and received venture funding – all which comprise a vibrant and growing sector. Now 2,100 companies and nearly 57,000 people strong, the Indiana life sciences industry continues its ranking as one of the five largest life sciences regions in the United States, and extends its success as the second highest exporter of life sciences products in the U.S for the ninth straight year.*



“Data is the new language. We must take a more intentional approach to promote engagement in advanced analytics between our industry and our research universities.”

– Patty Martin, President and CEO, BioCrossroads

BioCrossroads released *Artificial Intelligence and Advanced Analytics in Indiana: An Initial Discussion of Industry Needs and University*

Capabilities, a report from TEconomy Partners, that revealed that technological change is affecting our economy at an unprecedented pace and is driving significant investment demands and decisions by Indiana's industry partners and research universities.

While there is currently limited coordination between industry and academia in Indiana in these areas, Indiana University, Purdue University and the University of Notre Dame all have impressive, nationally ranked capabilities, investments and programs related to advanced analytics. Each has made significant investments to grow foundational data sciences and applied analytics capabilities that support talent pipelines and the development of applied analytical skills. The report provides a helpful overview of each university's strengths in these areas, and offers specific recommendations for more intentional engagements between industry and Indiana's research universities.

INDIANA LIFE SCIENCES SUMMIT AND FRAMEWORX

The 2019 Indiana Life Sciences Summit focused on digital transformation of the life sciences industry and related technology convergence with strong programming in both scientific and business tracks. The event attracted record crowds and featured noteworthy speakers on artificial intelligence and data analytics and research in neuroscience and Alzheimer's Disease.

During the conference, Dr. Clem McDonald, the “father of the electronic medical record” and Chief Health Data Standards

Officer, National Library of Medicine, National Institutes of Health, was awarded the Watanabe Life Sciences Champion award for his unprecedented impact on health IT and digital health in Indiana, across the U.S. and abroad.

BioCrossroads' Frameworx series included six events covering the topics of entrepreneurship stemming from university research, regenerative medicine, mentoring, diabetes research, public health, and the next generation of pharmaceutical companies.



BioCrossroads received a **\$2.9M** grant from **Lilly Endowment Inc.** to support university engagement, tech and biotech convergence, cross-sector collaboration, support of existing programs and activities.



In its 17th year, BioCrossroads also experienced dynamic activity – with new leadership, several groundbreaking projects and programs, and a report that will help guide the future of Indiana's advanced analytics and artificial intelligence assets. Life sciences and community leader Patty Martin joined as the president and CEO in July. Her expertise, drive and passion for life sciences and the impact it has on people and the community, particularly on Indiana is advancing the mission of BioCrossroads and is already making an impact.

life sciences exports

\$10.5B

state economic impact

2nd

highest in the U.S.

\$77B

* Indiana Business Research Center at the Indiana University Kelley School of Business

SINCE ITS INCEPTION, BIOCROSSROADS HAS PLAYED A CRITICAL ROLE IN THE LIFE SCIENCES INDUSTRY AS A CATALYST FOR COLLABORATION AND INNOVATION.



BioCrossroads, the 16 Tech Innovation District and the Indiana Biosciences Research Institute, together with the innovation offices of Indiana University, Purdue University and the University of Notre Dame, launched a new program to add more power to the entrepreneurial environment. Accelerating Innovation IN Science, or AXIS, pairs experienced mentors with rising stars to support and grow the life sciences ecosystem by cultivating serial entrepreneurs and driving innovation forward.

INscience

Seven life sciences organizations, led by BioCrossroads, came together to find new ways to spread the word about Indiana's diverse life sciences ecosystem. Together with Cook Regentec, Corteva Agriscience, Eli Lilly and Company, Indiana Biosciences Research Institute, Indiana Clinical and Translational Sciences Institute and Roche Diagnostics, they launched INscience, a free mobile device app that delivers breaking news, career opportunities, videos and community engagement events, to encourage local engagement and knowledge about Indiana's life sciences community.



As a way to foster artificial intelligence and machine learning as key tools to realizing new discoveries in the life sciences, BioCrossroads developed a new competition where innovators have access to data sets from Data.gov, the Indiana Management and Performance Hub, and the U.S. Department of Agriculture to identify and investigate a hypothesis aimed at improving two Indiana health issues – diabetes and opioid abuse. The BioCrossroads DataX BioInnovation Challenge was created in 2019 to intersect life sciences and data research and encourage new ways of investigating traditional disease biology and public health outcomes' questions.

INDIANA SEED FUND III

Indiana Seed Fund III closed six investments over the course of 2019, including Sabanto, Gate Neurosciences, Lumavate, Brickell Biotech, MBX Biosciences, and Sexton Biotechnologies.

The BioCrossroads Indiana Seed Fund program has invested in 30 companies since 2005, and those portfolio companies have gone on to raise more than one-half billion dollars.



AgTech



Technology



Therapeutic



Therapeutic



Therapeutic



Therapeutic Tech



ANTICIPATE

Identifying emerging technologies, systems and processes, and providing the resources for Indiana to be a global leader in Industry 4.0, digital transformation and the next industrial revolution.

Conexus developed a white paper outlining results of research and a preliminary draft of an operational approach for an innovation solution. Conexus also launched the peer-to-peer model where companies suggest an advanced technology topic for deeper exploration with a peer group of subject matter experts from other organizations. 3D printing was the first topic discussed.



FORGE

Strengthening industry competitiveness by connecting businesses, educators and government leaders to create strategies, build platforms and execute programs for continued growth.

Conexus expanded its networked community of industry, academic and public sector partners in 2019 to include more than **150 organizations**. Networked Community distinction is given to organizations that are engaged with Conexus in demonstrable ways, including participation in programming and event attendance.



On Oct. 29, Conexus hosted the inaugural joint Advanced Manufacturing and Logistics Council meeting event. It was attended by 114 industry executives from 92 organizations. Mitch Landess, vice president of innovation and digital transformation for Conexus, provided an update on Conexus' work to spur statewide digital adoption.



On Sept. 19, Conexus board and executive committee members of the Advanced Manufacturing and Logistics Council participated in a luncheon roundtable at Governor Eric Holcomb's residence where the groups provided insights and counsel regarding issues facing their industries and the state, including talent and infrastructure. Pictured (from left): Amanda Williams, logistics council member and vice president and general manager at FedEx; J. Mark Howell, president and CEO of Conexus; Governor Eric Holcomb; and Tim Millwood, Conexus board member and vice president, global manufacturing at Cummins.

Conexus Indiana concentrated its 2019 efforts to promote, grow and support Advanced Manufacturing and Logistics (AML) industry success in four focus areas.



INSPIRE

Motivating and preparing talent to fill the thousands of high-tech job opportunities available today and the millions of new jobs still yet to be imagined.

More than **3,000 Hoosier** secondary, post-secondary and working adult students were engaged in Conexus talent programming in 2019. This included more than 1,400 Hoosier students enrolled in Conexus' introductory AML curriculum, as well as more than 225 students who participated in its high school internship program. The interns worked at companies across the state, including Boston Scientific, Major Tool & Machine and Vera Bradley, where they learned how to manage projects, solve problems and employ communication skills that are critical for career development.



On Oct. 25, students from Indiana State University, Valparaiso University, Rose-Hulman Institute of Technology and Earlham College, won the top prize for the bachelor's degree track at the 2019 Conexus Case Competition. The winning team is pictured here with Danny Lopez, former Conexus board member, and J. Mark Howell, president and CEO of Conexus. More than 140 students from 22 colleges across the Midwest participated in the event that featured two tracks – one for bachelor's degree students and one for associate's degree seekers.



AMPLIFY

Sharing compelling stories about Indiana's makers and movers to increase awareness of the industries' impact on Indiana's economy and on people's lives.

Conexus hosted **25 events** with nearly **2,400 attendees** in 2019, including a statewide speaker series for college students and young professionals. A new ConexusIndiana.com launched and a monthly newsletter debuted in 2019. Conexus conducted a survey of more than 600 Hoosier parents, which found a lack of awareness and understanding of AML. The findings informed the creation of a public perception campaign that will launch in 2020.



On June 7, Conexus hosted its annual summer industry event, "Advanced Manufacturing and Logistics: Indiana's Innovation Economy," which brought more than 400 people to Indianapolis for an engaging conversation around the theme of *Crossing the Digital Divide: Manufacturing in the 21st Century*. (From left): Elizabeth Hagerman, Ph.D., moderator and former Conexus team member; Gerald Johnson, keynote speaker and executive vice president, global manufacturing at General Motors; Tim Millwood, vice president of global manufacturing at Cummins; Kevin McGowan, associate partner with McKinsey & Company; Dave Roberts, chief innovation officer, Indiana Economic Development Corporation; and Kim Ryan, senior vice president at Hillenbrand.



As Energy Systems Network (ESN) celebrated its 10th anniversary in 2019, it saw another year of tremendous progress on a number of its key projects and economic development initiatives that were made possible through strong collaborations with the Battery Innovation Center (BIC), the Indiana Housing and Community Development Authority (IHCDA) and the Indiana Economic Development Corporation (IEDC).

10th Anniversary Celebration – Jim Rogers Award

To highlight 10 years of success, ESN created the Jim Rogers Award to honor the memory of a founding board member with a \$20,000 philanthropic award to be given to the recipient's charity of choice. As CEO of Duke Energy, Jim Rogers helped raise the funds that started ESN in 2009 and after his retirement, he turned his focus to helping rural people in impoverished countries gain access to clean water and reliable electricity. Rogers sadly passed in late 2018, leaving a prestigious legacy of advancing clean technology throughout the energy sector.



Robert Galyen, CTO of CATL, an international advanced battery systems company, was chosen by ESN's Board of Directors as the Jim Rogers Award recipient. He chose to donate his award to the Grace for Healing Society of St. Vincent Foundation in honor of his granddaughter who received life-saving open heart surgery as an infant.

ADVANCED TRANSPORTATION



Indy Autonomous Challenge



ESN has joined forces with the Indianapolis Motor Speedway, (IMS), Dallara Automobili, Clemson University's International Center for Automotive Research, SEMA, and vehicle simulator company, Ansys, to power the Indy Autonomous Challenge (IAC). IAC, a competition among global universities to create software that enables self-driving race cars to compete in a head-to-head, high speed race at IMS. The announcement occurred at the Speed Equipment Manufacturing Association (SEMA) conference in Las Vegas in November. The winning team will take home a \$1 million prize. The IAC is a two-year competition that will culminate with a race at the IMS on October 23, 2021.



Perceptin



ESN helped recruit California-based Perceptin, a visual intelligence technology company specializing in autonomous driving solutions, to relocate its headquarters to Fishers, Ind., utilizing space at the Indiana IoT Lab, where they plan to create up to 160 new, high-wage jobs by the end of 2022. As part of the expansion, the company will work with the City of Fishers and ESN to develop and deploy a pilot program designed to identify solutions for the city's short-distance transportation needs while testing its autonomous low-speed electric vehicles (LSEVs).

Advancing Energy Technology

A major focus for ESN and the BIC in 2019 was advancing projects made possible through a two-year, \$5.2 million grant from the Indiana Economic Development Corporation (IEDC). Throughout the two years, ESN and the BIC have collaborated on projects and initiatives in energy storage, connected and autonomous vehicles (CAVs), economic development, Mobility-as-a-Service, communications and controls, electrification and battery testing, validation and manufacturing.

2019 IEDC GRANT SUCCESSES

>200 COMPANIES and INSTITUTIONS engaged

29 NEW PRODUCT LAUNCHES supported at the BIC

4 COMMERCIALIZATION PROJECTS launched

- Combined Heat & Power for Industrial Sites
- Energy Storage Software and Systems Department Controls
- Autonomous Vehicle Proving Grounds and Pilot
- Transportation Electrification and Mobility-as-a-Service (MaaS)

4 CORPORATE VENTURES launched

- LHP/Perceptin
- Cummins Digital Accelerator
- Purdue/McGavic
- OES/Duke Energy

3 COMPANIES INCUBATED at the BIC

- Ateios • Ten Nine Technologies • Brightvolt

2 HEADQUARTERS RELOCATION to Indiana

- Ateios • Perceptin

>\$25M & ~200 HIGH WAGE JOBS committed to the state of Indiana

4 SUMMITS held in Indiana & **>150** COMPANIES & INSTITUTIONS from around the world attending



ESN's involvement in the Moving Forward program, in collaboration with the Indiana Housing and Community Development Authority (IHCDA), continued in 2019. The program creates energy efficient affordable housing and transportation options that improve quality of life while decreasing the cost of living for low- to moderate-income individuals and families. Six developments across the state are currently in various stages of progress (Fort Wayne, Bloomington, Indianapolis, Lafayette, Gary and East Chicago).



The Moving Forward project in Bloomington, Ind., Pedcor's B-Line Heights, held its grand opening on August 16, 2019. ESN President and CEO Paul Mitchell spoke at the event along with Bloomington's Mayor John Hamilton, IHCDA Executive Director Jacob Sipe, and Vice President of Pedcor Companies Brandon Delk, along with several others.



Leaper X



ESN, Purdue University and Cummins collaborated on a microtransit pilot program called Leaper X. The program includes a web-based mobile application powered by Cummins, and a small trial fleet of designated campus shuttles, in addition to Purdue's traditional campus buses.



BIC Industry Stakeholder Luncheon and Networking Event



Nearly 200 attendees came to the energy storage sector event in October 2019, hosted by BIC and ESN. The 2019 event had a "Women in STEM" theme with the following keynote speakers:

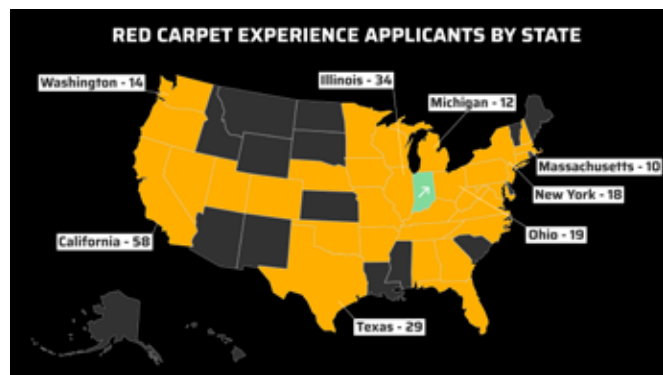
- Leila Madrone, founder and CTO of Sunfolding, a solar energy company
- Fran Lockwood, CTO of Valvoline
- Tomoko Ito, president and CEO of InQs, a low-light solar battery company

ADVANCED ENERGY

TECHPOINT

2019 was a record year in each of these three focus areas:

TALENT

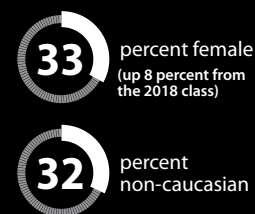


Indiana, like other states, is working to respond to historic talent shortages at a time when the tech community is growing at a record pace. New for 2019 was the “Wish You Were Here” campaign, which featured the “Red Carpet Experience” event. Executed in partnership with TMap, the initiative endeavored to identify and attract individuals living out-of-state with in-demand skills and an interest in moving to Indiana. TechPoint and TMap offered a 3-day “Red Carpet Experience” event for a select group of individuals, during which time it matched them with employers and showed them the best that Indy has to offer. TechPoint initially anticipated attracting 100 applicants to the program, but

XTERN 2019

The nationally regarded Xtern program recruits high-caliber, technical and business-skilled college students from across the US.

Diversifying Representation Within the Xtern Class



nearly 400 applied. The program was so impactful and well received that TechPoint plans to replicate it in 2020.

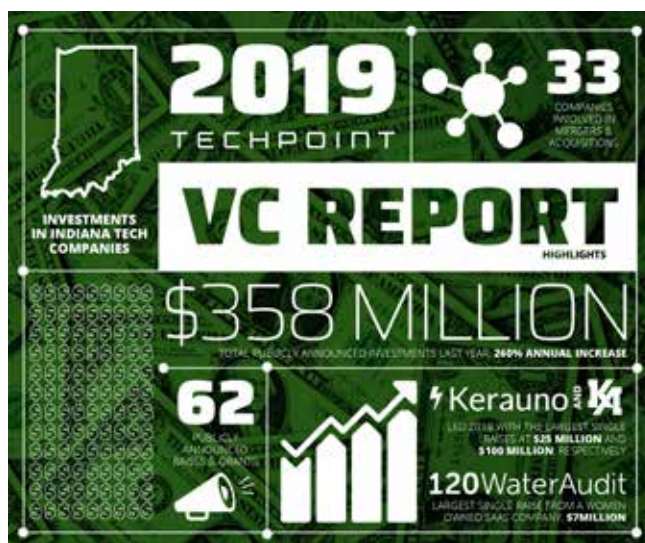
TechPoint also set records within its existing talent initiatives.

In 2019, Xtern had another record year with 166 students placed with 68 tech companies for the 10-week internship program. Nearly 1,900 students from 45 states and 212 universities across the U.S. applied for an estimated 175 spots with local tech companies for summer 2020. From that applicant pool, 209 student finalists were chosen to

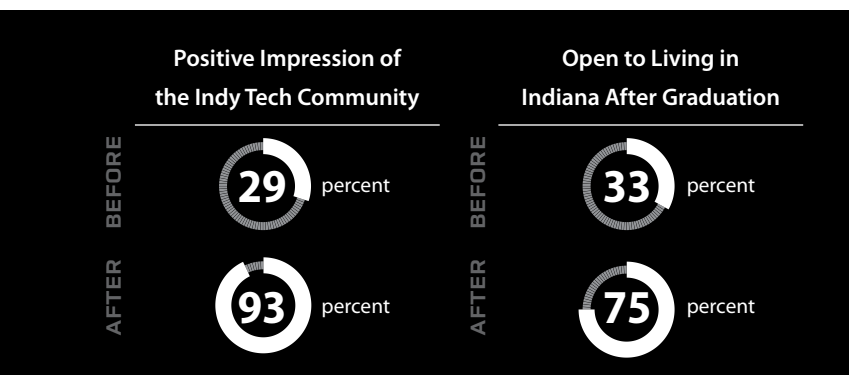
COMPANIES & CAPITAL

2019 was a strong year for venture capital investment in Indiana. Sixty-two Indiana tech companies publicly announced VC investments, grant funding, M&A deals, private equity and debt financing for total investments of more than \$358 million, increasing 260 percent over 2018.

To boost the quantity, quality, and frequency of VC firms visiting Indiana, TechPoint again offered its popular VC Speed Dating event where 46 local tech companies in need of investment met with 39 VC firms from 19 states and representing more than \$21 billion in current funds. TechPoint facilitated more than 275 meetings between investors and companies. Responding to demand and the need to continue attracting venture capital in 2020, TechPoint plans to hold and expand VC Speed Dating events.



TechPoint is the nucleus of Indiana's tech community and the growth platform for the state's tech companies and ecosystem. A mission-driven nonprofit, the organization is focused on helping the state's tech community and economy thrive in this increasingly digital age through a laser focus on accelerating the growth and strength of the local tech talent pool, company base, and community fabric.



participate in "Finalist Day" where TechPoint facilitated 800 interviews between those student finalists and 103 employer teams, yielding 139 employer-student internship matches.

In addition to the traditional Xtern program, a pilot was launched with IUPUI to retain more Xterns in their internship positions during the school year. IUPUI students across a variety of majors now complete their summer internships and transition into part-time work for credit during the semester.

TechPoint also held three Sales Bootcamps in 2019, and maintained more than a 90 percent job offer rate for the job

seekers and career changers who completed the program. Additional Bootcamps are planned for 2020.

The Technology Councils of North America selected TechPoint's Jobs in Tech 101 product for the inaugural Talent Pipeline & Workforce Innovation Award. Jobs in Tech 101 educates and informs students and career changers about which jobs exist in tech, what they are like, and what skills and experience are required. TechPoint plans to further develop this product in 2020.

COMMUNITY

TechPoint continually seeks ways to refine, improve and expand services to its member companies as well as the tech community as a whole. Ninety companies and universities were TechPoint members in 2019. They range from many of the largest tech and tech-enabled employers in our state to most of the highest-promise scale-ups.

The 20th annual Mira Awards were announced to a sold-out, record crowd of 1,400 attendees. Only a handful of the 2019 nominees existed as companies when the Mira Awards debuted in 1999, and 82 percent were founded in the past decade. Fourteen award winners and honorees were chosen from 138 nominees (up 8 percent from the 2018 class).



EXECUTIVE COMMITTEE & BOARD OF DIRECTORS

Executive Committee

Connie Bond Stuart
CICP Chair

Regional President, Central and Southern Indiana
PNC

Bryan Mills
CICP Vice Chair

President and CEO
Community Health Network

Stephen Ferguson
CICP Secretary

Chairman
Cook Group

Catherine Langham
CICP Immediate Past Chair

President
Langham Logistics

Board of Directors

Scott Beck

President
Beck's Hybrids

David Becker

President and CEO
First Internet Bank

Michael Berghoff

President and Owner
Lenex Steel

Gail Boudreaux

President and CEO
Anthem

Aman Brar

CEO
Jobvite

Phil Burkholder

*Executive Vice President,
Defense Global Manufacturing,
Assembly and Test*
Rolls-Royce

Patrick Carr

President and CEO
UnitedHealthOne

Stanley Chen

CEO
Telamon

Justin Christian

President and CEO
BCforward

James Connor

Chairman and CEO
Duke Realty

Robert Coons

President
Rose-Hulman Institute of
Technology

Ellen Swisher Crabb

Vice Chair
United Animal Health

Deborah Curtis

President
Indiana State University

Mitchell Daniels, Jr.

President
Purdue University

James Danko

President
Butler University

J. Scott Davison

President and CEO
OneAmerica
Financial Partners

Scott Doyle

Executive Vice President of
Natural Gas Distribution
CenterPoint Energy

Sue Ellspermann

President
Ivy Tech Community College

Mark Emmert

President
National Collegiate
Athletic Association

Claire Fiddian-Green

President and CEO
Richard M. Fairbanks
Foundation

David Findlay

President and CEO
Lake City Bank

Rick Fuson

President and COO
Pacers Sports &
Entertainment

Rajan Gajaria

Executive Vice President,
Business Platforms
Corteva Agriscience

David Graziosi

President and CEO
Allison Transmission

David Hakanson

Vice President of Sales
IndyStar

Jim Hallett

Chairman and CEO
KAR Global

Jason Harrington

President and CEO
Ontario Systems

Jeff Harrison

President and CEO
Citizens Energy Group

Charles Henry

Vice President of Package
Operations
UPS

2020 Executive Committee

At its December 2019 meeting, the CICP Board of Directors elected and expanded its Executive Committee for 2020. The new slate of officers is:

Connie Bond Stuart
CICP Chair

Regional President, Central and Southern Indiana
PNC

Bryan Mills
CICP Vice Chair

President and CEO
Community Health Network

Stephen Ferguson
CICP Secretary

Chairman
Cook Group

Jeff Smulyan
CICP Treasurer

Chairman and CEO
Emmis Communications

Mark Hill
CICP At-Large
 Managing Partner
 Collina Ventures

Jeff Smulyan
CICP At-Large
 Chairman and CEO
 Emmis Communications

Robert Hillman
 President and General
 Manager, Indiana
 Anthem Blue Cross &
 Blue Shield

Allan Hubbard
 Chairman
 E & A Companies

Jim Irsay
 Owner and CEO
 Indianapolis Colts

John Jenkins
 President
 University of Notre Dame

Bruce King
 CEO
 Helmer Scientific

J.A. Lacy
 President and CEO
 LDI, Ltd.

Tom Linebarger
 Chairman and CEO
 Cummins

Kristin Mays-Corbitt
 President
 Mays Chemical

Michael McRobbie
 President
 Indiana University

Geoffrey Mearns
 President
 Ball State University

Jamie Merisotis
 President and CEO
 Lumina Foundation

Mark Miles
 President and CEO
 Penske Entertainment
 Indianapolis Motor Speedway

Dennis Murphy
 President and CEO
 Indiana University Health

Jonathan Nalli
 CEO
 St. Vincent Health

Michael Packnett
 President and CEO
 Parkview Health

Kelly Pfladderer
 Former CEO and Founder
 Apparatus

Stan Pinegar
 President
 Duke Energy Indiana

David Ricks
 Chairman and CEO
 Eli Lilly and Co.

James Risk, III
 President and CEO
 Kirby Risk

N. Clay Robbins
 Chairman, President and CEO
 Lilly Endowment

Jim Ryan
 Chairman and CEO
 Old National Bank

Amy Schumacher
 President
 Heritage Group

Jeffrey Simmons
 President
 Elanco Animal Health

J. Albert Smith
 Chairman, Indiana
 JPMorgan Chase

Bill Soards
 President
 AT&T Indiana

Robert Stutz
 CEO, Marketing Cloud and
 Chief Analytics Officer
 Salesforce

Phillip Terry
 CEO
 Monarch Beverage

John Thompson
 President
 Thompson Distribution

Kenneth Zagzebski
 Executive Chairman
 Indianapolis Power & Light

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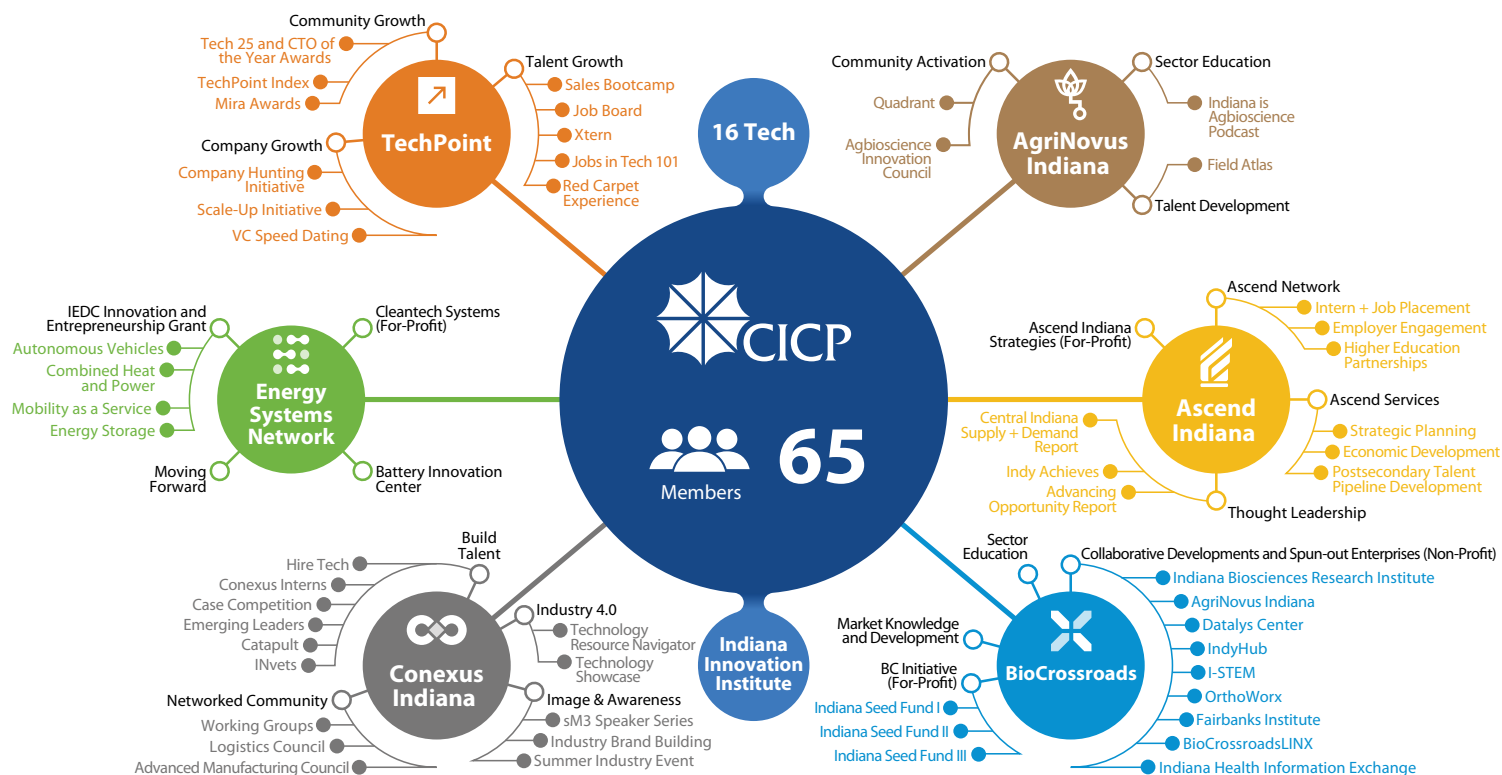
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CICP At-Large
 Chairman and CEO
 Cummins

2019 CICP ENTITIES



CICP AND INITIATIVES



The Central Indiana Corporate Partnership (CICP) was formed in 1999 to bring together the chief executives of Central Indiana's prominent corporations, foundations and universities in a strategic and collaborative effort dedicated to the region's continued prosperity and growth. To advance this mission, CICP sponsors six key talent and industry sector initiatives, **AgriNovus Indiana**, **Ascend Indiana**, **BioCrossroads**, **Conexus Indiana**, **Energy Systems Network** and **TechPoint**, each of which addresses challenges and opportunities unique to its respective area: agbiosciences, talent and workforce development, life sciences, advanced manufacturing and logistics, energy technology and technology.

Visit www.cicpindiana.com.



AgriNovus Indiana is the state's initiative focused on advancing the agbiosciences sector as a nationally recognized leader through education, research and talent development; strategic collaborations among corporations, industry associations, government and universities; the creation and support of new companies; and branding and targeted promotions to elevate the sector.

Visit www.agrinovusindiana.com.



Ascend Indiana is an organization that brings together industry, higher education and philanthropic leaders to advance our region's prosperity and growth. Ascend's vision is for Indiana to be a place of economic opportunity for all. To achieve this, Ascend bridges talent and communication gaps by creating connectivity between people and employers. Ascend has focused its efforts around three core priorities: connecting job seekers to career opportunities through the Ascend Network talent platform; providing strategic consulting to address labor market gaps through Ascend Services; and informing workforce research and public policy through data aggregation, analysis and thought leadership.

Visit www.ascendindiana.com.



BioCrossroads is Indiana's initiative to grow, advance and invest in the life sciences, a public-private collaboration that supports the region's existing research and corporate strengths while encouraging new business development. BioCrossroads invests capital and provides support to life sciences businesses; launches new life sciences enterprises (Indiana Biosciences Research Institute, Indiana Health Information Exchange, Fairbanks Institute for Healthy Communities, BioCrossroadsLINX, OrthoWorx and Datalys Center); expands collaboration and partnerships among Indiana's life science institutions; promotes science education; and markets Indiana's life sciences industry.

Visit www.biocrossroads.com.



Conexus Indiana has been positioning the Hoosier State as the best place for advanced manufacturing and logistics industries to invest, employ and succeed, for more than a decade. By collaborating with industry, academic and public sector partners on a shared vision for an innovative, skilled workforce and stronger business climate, Conexus Indiana has helped to create opportunities for advanced manufacturing and logistics companies; prepare Hoosiers to succeed in the state's largest industry sectors; and maintain Indiana's competitive advantage.

Visit www.conexusindiana.com.



Energy Systems Network (ESN) a non-profit, industry-driven initiative focused on the development of the advanced energy technology sector. ESN leverages its network of global thought leadership to develop integrated energy solutions to increase quality of life for today and tomorrow. ESN's collective focus is to: reduce costs, emissions and waste; influence policy; and advance technological innovation.

Visit www.energysystemsnetwork.com.



TechPoint is the nonprofit, industry-led growth initiative for Indiana's technology companies and overall tech ecosystem. The team is focused on attracting talent; accelerating scale-up companies; activating the community; and amplifying stories of success.

Visit www.techpoint.org.

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