

Central Indiana Corporate Partnership

2018 ANNUAL REPORT



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LETTER FROM THE PRESIDENT



Just six years ago, when I signed on as the President and CEO of the Central Indiana Corporate Partnership (CICP), we were an organization of about 30 people and four industry sector initiatives (BioCrossroads, Conexus Indiana, Energy Systems Network and TechPoint). Since that time, we have

added our talent initiative Ascend Indiana, now our largest initiative; and recognized that our agbiosciences sector deserved its own focused effort with the inception of AgriNovus Indiana. CICP and all our initiatives are being called upon to do more work to advance the economic prospects for our region and state and likewise, we have grown to meet that need. By the end of 2019, our team will likely be more than 100 strong.

Also, since 2013, 16 Tech, the Indiana Biosciences Research Institute (IBRI) and the Applied Research Institute, now known as Indiana Innovation Institute (IN3), have all gone from big visions to even larger realities, primarily because of the work CICP has done to get each of them off the ground.

2018 has seen continued progress, and has been an especially productive year for CICP, our projects and our initiatives—all as you'll see in the pages ahead.

At our August board meeting, we approved the move of CICP and our six talent and industry sector initiatives to the first building being constructed at 16 Tech, with our move-

in scheduled for May 2020. At 16 Tech, CICP has a unique opportunity to be a part of, and sit in the middle of, our talent and innovation district – putting our initiatives and employees near university colleagues, entrepreneurs, innovators and companies that we already collaborate with, ones that we hope to engage with in the future, and others that are yet to be created. We will be at the center of what we know will be a transformative place for our region and state—and in the bargain, for CICP as well.

The early 2018 launch of Bruce Katz and Jeremy Nowak's book, *The New Localism*—with its extensive focus on CICP as a global model for communities in structuring and governance of economic development activity—spurred considerable publicity and acclaim for CICP. Our organization enjoyed additional commendations, and more than a few phone calls from across the United States inquiring about the secrets of our success, as articles and opinion pieces continued to surface lauding CICP's efforts. On a related front, the Brookings Institution's Metropolitan Policy Program released a report, *Rethinking Cluster Initiatives*, that also praised CICP for our unique structure and member engagement, enabling us to get things done. The study cited CICP as "one of the most impactful business and civic leadership groups in the nation."

BioCrossroads, AgriNovus Indiana and Ascend Indiana are all highlighted in the report as examples of different approaches CICP takes to advance innovation and talent.

As CICP looks to ensure our organization is continuing to deliver maximum impact, we released two landmark pieces of research that will continue to inform and guide our work, both of which we (and many of you and our partner organizations) worked with intensively to complete. The Brookings Institution's report, *Advancing*

Opportunity in Central Indiana, was a massive and masterful effort to understand rising regional opportunities along with troubling barriers to progress for more of our citizens to participate in a rapidly changing economy.

Our branded initiatives remained busy, both in addressing the priorities of their respective stakeholders and sectors, and also in increasingly collaborative activities in pursuit of shared opportunities over the last year. Conexus and Ascend worked together to develop a feasibility study for a statewide advanced manufacturing training program. In addition, BioCrossroads and Ascend collaborated on advancing specific life sciences growth opportunities that resulted, among other things, in adding Cook Medical and Catalent to the Ascend Network.

Over the course of 2018, our membership remained strong with 65 entities. We gained an integral partner with our new member, Amy Schumacher, president of The Heritage Group, and we welcomed a number of other new members as they succeeded to the CEO suite and leadership of longstanding CICP members.

Chair Jack Phillips, president and CEO of Roche Diagnostics, and the rest of our executive committee have signed on for another tour of duty through 2019. The importance of their leadership and dedication can't be underscored (or acknowledged and thanked) enough as the year ahead will continue to be one of growth, change and opportunity. We are fortunate to have such strong leadership guiding our organization.

In December, I announced my long-anticipated departure from BioCrossroads' leadership and move over to CICP to serve as CEO on a full-time basis. It's definitely the right

time for this transition, but it's still a bittersweet moment for me to leave the professional team and life sciences leaders who have energized every day of my professional life for more than 15 years at BioCrossroads. That said, I am privileged to have the opportunity to serve, and excited to assume this full-time CEO role—at long last—at CICP.

As CICP enters our 20th year, it's important to look back to see how far we've come, but to also focus on the future and the opportunities (mixed of course with just a few challenges) ahead. Our family of CICP talent and industry sector initiatives and sponsored organizations have tremendous momentum, and are increasingly seen on not only a statewide, but national stage, as best practices for doing big things—and doing them well, and right. We are teeming with industry and talent leaders as well as those who turn ideas into action and results. Cheers and great expectations for the coming year, when we hope to accelerate the advance of progress, talent and innovation for Central Indiana—through your engagement, collaboration and vision for what our best future must, in fact, become.

Sincerely,



David L. Johnson
President and CEO
Central Indiana Corporate Partnership

CENTRAL INDIANA CORPORATE PARTNERSHIP

2018 continued to bring some fanfare to the Central Indiana Corporate Partnership (CICP) as a result of the Bruce Katz and Jeremy Nowak book *The New Localism – How Cities Can Thrive in the Age of Populism*. CICP hosted both CICP-only and community events with both Katz and Nowak. They discussed why they featured Indianapolis in their book, why Indianapolis and CICP are unique entities, and what other regions can learn from the Indianapolis example.



CICP CITED AS NATIONAL CIVIC LEADER

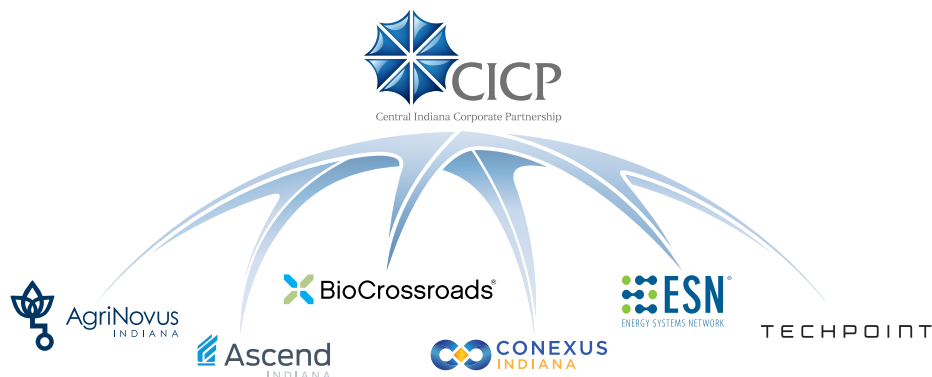
City of Indianapolis Mayor Joe Hogsett, CICP President and CEO David Johnson, and Brookings Institution's Vice President and Director of the Metropolitan Policy Program Amy Liu joined Katz and Nowak in a panel discussion moderated by Melina Kennedy, general manager, Aerospace and Defense Business, Cummins Inc.



Leaders from the City of Indianapolis, CICP and Brookings Institution participated in a panel discussion at a community event on the book *The New Localism – How Cities Can Thrive in the Age of Populism*.

Throughout the year, multiple news articles and opinion pieces about the book lauded CICP and its unique efforts to combine effective community leadership, data and strategy, and funding to provide a winning “structure to the practice of collaboration.”

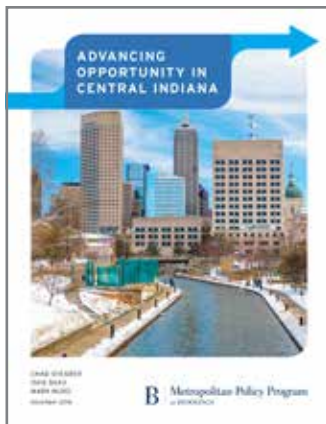
On a related front, a new report from the Brookings Metropolitan Policy Program, *Rethinking Cluster Initiatives*, cited CICP as a successful model and national case study for driving a regional economy from advanced industry clusters of demonstrable, scalable strength. The report takes a fresh look at the concept of industry clusters and offers practical guidance for metropolitan leaders considering investments in cluster initiatives, drawing on five in-depth case



studies, including CICP, which is cited as a “rare organization that is not devoted to a single issue or cluster, but rather has developed the reputation and abilities to seed several well-respected initiatives over time.” BioCrossroads, AgriNovus Indiana and Ascend Indiana are all featured in depth within the case study as examples of unique ways to advance regional economies through the growth of industry or talent clusters.

LANDMARK REPORTS FIND OPPORTUNITIES AND CHALLENGES

CICP coordinated the research and release of two landmark reports in 2018 – both of which uncovered several challenges to Central Indiana’s economy as well as found opportunities to align resources and investments to address these challenges and ensure economic growth.



Increasingly concerned about the lack of economic mobility within our region and the associated costs to industry, CICP and Ascend Indiana commissioned Brookings Institution to evaluate the nature of jobs that exist within the Indianapolis metropolitan area. Specifically, Brookings assessed whether there

are enough “good jobs” (generally, jobs that pay at least \$18/hour plus health benefits) in the regional economy to allow upward mobility in to the middle class. Through the *Advancing Opportunity in Central Indiana* report, Brookings looked not only at the good jobs that provide those advantages today, but also at “promising jobs” that provide stepping stones to the region’s middle class over time.

Their analysis determined that years of economic change have left Central Indiana with more jobs but less opportunity for many workers. Like in other U.S. regions, Central Indiana’s middle class remains smaller today than prior to the Great Recession, despite its robust jobs recovery. Underneath these high-level trends, the report found a growing dearth of good and promising jobs, especially for workers without a bachelor’s degree.

The report explores ways in which leaders from throughout the Central Indiana region can advance economic opportunity by focusing the region’s economic and workforce development efforts on Opportunity Industries, those industries that concentrate the region’s good jobs and promising jobs.

It also recognizes that:

- Opportunity Industries disproportionately contain Central Indiana’s good jobs and can help close its opportunity deficit.
- Career pathways to good jobs in Central Indiana’s Opportunity Industries usually involve a major career switch.
- Central Indiana workers’ chances of obtaining a good job vary by their education, race and gender.
- Central Indiana has a lead on other regions in advancing opportunity.

In addition, the report provides recommendations for four strategies to help advance opportunity in the local economy.

CICP’s second research report addressed the current status of Central Indiana’s advanced industry clusters of strength, identifying current business trends and rapidly converging technological developments around artificial intelligence, automation, predictive analytics and machine learning that will both expedite and complicate the future for many of these industries, if not all. The report goes on to propose strategies for CICP and our talent and industry sector initiatives to undertake in the years ahead. It’s been nearly 20 years since a Battelle Technology Practice study provided the foundation and rationale for what has become CICP’s cluster-based economic development strategy. In the 2018 update, CICP worked with Battelle’s successor organization, TEconomy Partners, on a report which presented a nuanced analysis of the most important clusters in Central Indiana (which correspond to the industry sectors that CICP has organized and promoted), *Clusters and Disruptors: Envisioning Central Indiana’s Economic Future in a Time of Change*.

FORCES OF CHANGE

Trends and Tech Impacting Central Indiana Business Clusters

1 MEGATRENDS:

New models of product and service delivery.

Automotive Sector



Shared Economy



New Models for Mobility

2 CONVERGENCE:

Traditionally separate industries and businesses working together to meet identified market needs.

Life Sciences Sector



IT Applications



Cyber/Digital Disease Management

3 DISRUPTIVE TECHNOLOGIES:

Novel technologies that substantially shake up existing markets.

Logistics Sector



Autonomous Vehicles



Demand for Smart Infrastructure

The report recognizes that Central Indiana's clusters of strength—agbiosciences, aircraft/aerospace, automotive/mobility, IT, life sciences, and logistics—are doing well, but their future success may be undermined by the pace of technological disruption and the rapidly escalating convergence of a wide range of technology-related advancements. TEconomy provides five strategic priorities and several associated actions that CICP, its initiatives, and other partners could pursue to ensure our continued economic growth and enhance our global relevance.

FOCUS ON TALENT

In its role as a convener and supporter of efforts to improve and grow Indiana talent, CICP was asked by the Governor's Workforce Cabinet to work on three projects aimed at building a strong education and workforce development system. The Cabinet is a newly established working group with the goal of enhancing coordination among the State workforce and talent development programs to improve the overall quality of Indiana's workforce.

Funded by the Richard M. Fairbanks Foundation, CICP's first project focused on developing a promotional campaign

aimed at increasing the perceived value of education in Indiana important for a student's future success. CICP worked with a market research firm to survey and analyze the targeted audiences (students, parents, educators, and employers). The research uncovered misconceptions, misunderstandings, and a lack of information within each of these target groups relative to the value of education in Indiana. CICP also engaged with a public relations firm to develop a robust framework and communications plan which would enhance the perceived value of education, with a specific focus on motivating students aged 11-20 to complete high school and enroll in and complete postsecondary programs.

Another aspect to the overall project involved a thorough review of the sources and uses of funding currently allocated to workforce development programs and Career and Technical Education (CTE) programs.

The third project brought together CICP, Ascend Indiana and Conexus Indiana to assess the feasibility of launching a new workforce training program called Catapult Indiana. Catapult Indiana will build on the success of an existing

program in use at Subaru of Indiana Automotive and Toyota Motor Manufacturing Indiana. A collaborative effort among industry, non-profits, and adult education providers, Catapult Indiana will equip unemployed and underemployed Hoosiers with the skills necessary to quickly enter the advanced manufacturing workforce.

Through their work, the CICIP-Conexus-Ascend team determined to expand the program, and add three new locations and 2,500 participants annually. The feasibility study revealed that Catapult Indiana will result in sustained employment for the previously unemployed and underemployed, significant savings to public assistance programs, meaningful wage gains for graduates, and a reliable pipeline of workforce ready Hoosiers with higher retention for Indiana's advanced manufacturers. In 2019, additional work will be done to operationalize the program.

ROUNDTABLES, DISCUSSIONS AND FORUMS

CICIP convened several small sessions with members on topics affecting our community, their businesses and Indiana's future.

Early in the year, CICIP facilitated three small-group discussions with members to better understand their specific and shared views, as both major employers and civic leaders, of the challenges and opportunities for reform of Indiana's healthcare system. The sessions also served as a venue to share lessons and best practices around current efforts to promote healthier workplaces and lives for employees. During the sessions, members identified a number of priorities for further action, including better understanding the state's healthcare system, delivering more cost-effective and reliable care, and encouraging higher levels of wellness and disease-prevention among employees and citizens. Members and CICIP leadership resolved to work more closely with the Governor's office and the state healthcare agencies in the collaborative development of more effective and responsive projects and programs for the State to implement through the upcoming legislative session and in the months ahead.

In April, through the generosity of member Mark Hill, managing partner of Collina Ventures, Meg Whitman came to Indianapolis and shared her vision about the importance of educational equity with our members and other community leaders at a private luncheon and discussion. Whitman is the former president and CEO of Hewlett-Packard Company and eBay, and chairperson-elect of Teach for America.

Finally, rounding out the year, in conjunction with the *TEconomy Clusters & Disruptors* report, researcher Simon Tripp conducted several small-group discussions to allow our members to take a deeper look into the report's findings, their implications for Indiana's advanced industries, and best prospects for growth on a rapidly changing market and technology landscape. Member interest in these discussions was intense and immediate. A variety of good ideas emerged for effective steps going forward.



Meg Whitman, former president and CEO of Hewlett-Packard Company and eBay, and chairperson-elect of Teach for America, talks to CICIP and community members on the importance of educational equity.

LOOKING AHEAD

On a cold day in December, CICIP and other community leaders put shovels to dirt and broke ground on the first building being constructed at 16 Tech Innovation District—a building that will also be CICIP's future home. Earlier in 2018, CICIP's board of directors approved the move of CICIP and our six talent and industry sector initiatives into 16 Tech's Building One, with the move tentatively scheduled for May 2020. Having CICIP located at 16 Tech offers an incredible opportunity in the hot bed of innovation, technology convergence and talent attraction. Proximity matters—and having CICIP's creative and talented team living and working every day alongside other imaginative thinkers and doers is a recipe for success, one that will yield great things for our community.



CICIP President and CEO David L. Johnson speaking at the groundbreaking of 16 Tech.



The Advanced Research and Innovation Building at 16 Tech will be the headquarters for CICIP, the Indiana Biosciences Research Institute, and researchers for the IU School of Medicine's Indiana Center for Regenerative Medicine and Engineering.

16 TECH BUILDS MOMENTUM

In 2018, in collaboration with corporate, civic, nonprofit and community leaders, the 16 Tech Community Corporation secured key funding, enhanced resources and fortified community support for Indianapolis' largest talent attraction, retention and development project – the 16 Tech Innovation District.

First envisioned almost 20 years ago, the innovation district built significant momentum in 2018, paving the way for nearly 3,000 jobs, 2 million square feet of office, lab and makerspace, multi-family housing and retail space and 15 acres of green space by 2030.

In March, 16 Tech Community Corporation announced a \$38 million grant from Lilly Endowment Inc. that helps fund the initial development phase of the innovation district and supports 16 Tech's work to create a place that inspires creativity and facilitates collaboration. At the same time, 16 Tech announced an agreement with Browning Investments to construct three new buildings and renovate one facility on 11 acres of property, an investment from the Indianapolis-based developer that tops \$120 million.

The 16 Tech Community Corporation staff grew as President and CEO Bob Coy brought on board Chief Operating Officer Emily Krueger, Director of Community Initiatives Starla Hart and Director of Business Development Eric Miller.



Emily Krueger,
Chief Operating Officer,
16 Tech



Eric Miller,
Director of Business
Development,
16 Tech



Starla Hart,
Director of Community
Initiatives,
16 Tech



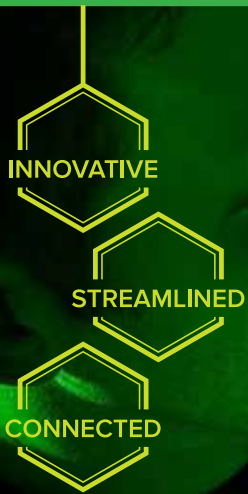
Building on its commitment to ensure that the benefits of 16 Tech's economic growth support access, opportunity and revitalization of nearby communities, 16 Tech Community Corporation also launched a community investment fund and appointed a 10-member advisory committee. The committee is made up of residents, community leaders and supporting organizations that represent the neighborhoods and priorities of the Near West and Northwest areas and is anticipated to start making grants in 2019.

In December, 16 Tech Community Corporation and nearly 300 business, civic and community leaders broke ground on the innovation district's anchor building. The Advanced Research and Innovation building will serve as the headquarters of the Indiana Biosciences Research Institute (IBRI), the Central Indiana Corporate Partnership (CICP), including its talent and industry sector initiatives, and researchers with the Indiana University School of Medicine's newly established Indiana Center for Regenerative Medicine and Engineering, a molecular therapeutics program and technology incubator.

16 Tech also welcomed Cook Regentec to the innovation district and joined in the company's ribbon-cutting ceremony. Cook Regentec, a new product development/startup accelerator, engages a multi-disciplinary team of scientists, engineers, entrepreneurs and physicians to create new research and clinical tools that deliver advanced regenerative medicine therapies.



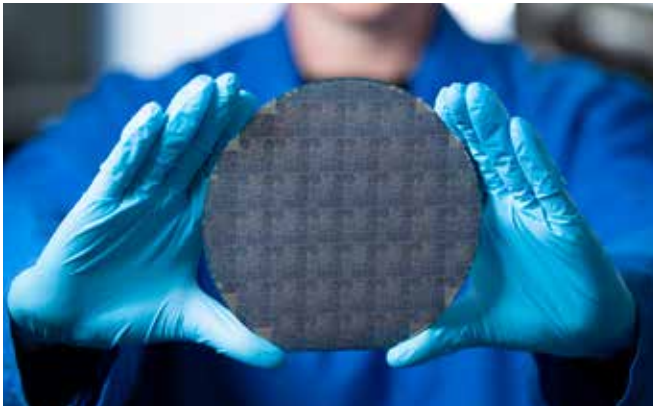
Business and community leaders broke ground on the 16 Tech Innovation District in December.



INDIANA INNOVATION INSTITUTE (IN3) SOLIDIFIES FOCUS

The Indiana Innovation Institute (IN3) made great progress in 2018 in meeting its mission and its primary goals. Throughout the year, it solidified its focus on pursuing areas of applied research aimed at solving difficult technical challenges facing the U.S. Department of Defense (DoD) and industry in areas including trusted microelectronics, hypersonics and electro-optics.

In April, the organization rebranded and changed its name from the Applied Research Institute (ARI) to the Indiana Innovation Institute (IN3). IN3 also awarded a \$2.3 million contract to Purdue University to create ASSURE (Achieving Scientifically Secure User Reassurance in Electronics), a program conducting research in trusted microelectronics, which are technologies that are counterfeit resistant and immune to a wide variety of attacks. Purdue is also working with Indiana University and the University of Notre Dame on the research.



IN3 is working with Purdue University, Indiana University and the University of Notre Dame on a trusted microelectronics program that addresses the security and anti-counterfeiting in the supply of semiconductors to the military and industry.



Indiana has distinct capabilities to support the pursuit of hypersonic travel and weapons systems, with significant work being done at the University of Notre Dame and Purdue University.

In June, IN3 signed a four-way cooperative research and development agreement (CRADA) with NSWC Crane, Purdue University and Indiana University to further its research and allows for the entities to work collaboratively and ensures open communication of technical requirements, research results and the sharing of intellectual property between the parties.

Another key development was the formation of the Indiana Consortium for Advanced Technology



Transition (INCATT) to bring together an alliance of collaborative organizations (e.g., large and small companies, non-profits, academia, etc.) to help find solutions to some of the threats currently impacting our national security including the reliability and security of the national semiconductor supply chain and the development of hypersonic weapons and defensive systems to counter these weapons. By the end of the year, INCATT had more than 45 members. IN3 also began its bi-monthly Member Showcase events to highlight some of the great work INCATT members are doing across the state.

IN3 also opened a new collaboration and innovation space at WestGate@Crane Technology Park in Odon, Ind., just

outside the gates of NSWC Crane. The collaboration space allows engineers from NSWC Crane, INCATT members, academic partners and other businesses to collaborate on research projects.

In addition, two other important collaborations were formalized with the Indiana Biosciences Research Institute (IBRI) and the Wabash Heartland Innovation Network (WHIN).



IN3 opened a new collaboration and innovation space at WestGate@Crane Technology Park.



IN3 is looking to create a maker space in a warehouse at WestGate@Crane Technology Park.

AGRINOVUS INDIANA

2018 brought a new set of strategic priorities for AgriNovus Indiana to promote and accelerate the growth of the agbioscience community through a multi-faceted approach to amplify, build, connect and activate the sector's growth and expansion. AgriNovus and its stakeholders have committed to make Indiana the home to unparalleled agbioscience talent and innovation.

AMPLIFY THE AG+BIO+SCIENCE STORY

Expanding Public Education and Awareness – Indiana is Ag+Bio+Science

What are the agbiosciences? Simply stated: it's where food, agriculture, science and technology converge. Yet, the sector name and definition are not well-known or understood by many because of misperceptions about modern food and agriculture. In 2018, AgriNovus shared the Ag+Bio+Science story in several new ways. The Indianapolis International Airport's 8.5 million annual visitors can now learn about the importance of agbiosciences to the State. A standing exhibit of the letters: AG+BIO+SCI together with facts about the sector in Indiana were installed near the baggage claim area and the AgriNovus message can also be found on the airport's signature digital billboard.

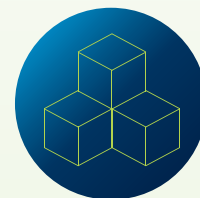
In July, a new public education effort produced by Inside INdiana Business, was launched in the form of a weekly podcast - "Indiana is Ag+Bio+Science". There have been over 2,000 unique downloads of the 22 episodes which feature compelling and relatable conversations with agbioscience leaders, innovators, entrepreneurs, researchers, investors, and others.



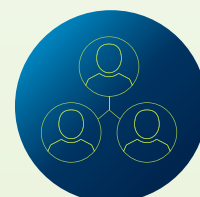
Ellie Symes, founder and CEO of The Bee Corp talks with Gerry Dick, host of Inside INdiana Business, on the Indiana is Ag+Bio+Science podcast.



**AMPLIFY THE
AG+BIO+SCIENCE STORY**



**BUILD WORLD
CLASS TALENT**



**CONNECT
PEOPLE + ORGANIZATIONS**



**ACTIVATE
ENTREPRENEURS**

Creating the Movement at the Agbioscience Innovation Summit

In November, AgriNovus hosted its fourth annual Agbioscience Innovation Summit “Ag+Bio+Science: Convergence in Indiana” presented by Corteva Agriscience and Elanco. The Summit has become the preeminent convening conference for the agbioscience community and brought together diverse industry and business leaders, entrepreneurs, scientists, students, and investors to discuss food and ag tech investment, the start-up journey, industry convergence, and opportunities for continued Indiana leadership. The event featured two dozen national and global thought leaders, and attracted a record-setting 464 attendees. The Summit also was the ideal venue for two significant announcements. Silicon Valley venture and innovation firm SVG Partners announced the expansion of their THRIVE Accelerator to Indianapolis and the Midwest in partnership with AgriNovus. And, Brazilian digital ag company Solinftec revealed that their North American headquarters would be coming to West Lafayette, Ind.

BUILD WORLD CLASS TALENT

National FFA Blue Room – Presented by AgriNovus Indiana and Powered by Microsoft

At the National FFA Convention & Expo in October in Indianapolis, AgriNovus sponsored the Blue Room. The Blue Room was a 17,000-square-foot interactive space focused on bringing experiential learning and exposure to innovation, technology and other advancements in food and agriculture to high school students. It also offered students and educators a first-hand view of the innovative jobs and career pathways available in the agbiosciences. AgriNovus and National FFA created the concept for the inaugural Blue Room and other sponsors, including Elanco, Corteva Agriscience, BASF, Cargill, FMC and John Deere, participated by showcasing how technology and innovative advances are currently taking place in their companies, the future innovations they are predicting, and how combining those will affect the job opportunities of the future. The total number of visitors through the Room over the three-day event reached 4,300, which included FFA high school student members and advisors from around the country, special guests such as Governor Eric Holcomb, Indiana Senator Todd Young, U.S. Secretary of Education Betsy DeVos, and industry guests. AgriNovus and Microsoft were paired together as



Panelists at the Agbioscience Innovation Summit discuss Indiana's converging industry clusters and the need for enhanced collaboration.



Beth Bechdol, president and CEO of AgriNovus Indiana, welcomes students to the FFA Blue Room presented by AgriNovus Indiana and powered by Microsoft.



AgriNovus welcomed FFA students to the Blue Room with an interactive display where they could write inspirational phrases on post-it notes and then place them on the AG+BIO+SCI letters.

exhibitors in the welcome room to the Blue Room, where the message focused on the agbiosciences and why Indiana is a leader in the sector. AgriNovus also had two board members, The Bee Corp Founder and CEO Ellie Symes and Wabash Heartland Innovation Network (WHIN) CEO Johnny Park, give Ted-style talks in the Room.

Agbioscience Career Discovery Tool Under Construction

AgriNovus began the build out of a web-based interactive agbioscience career discovery tool for higher education students who are unfamiliar with the sector. The site will initially feature a comprehensive listing of agbioscience career pathways along with descriptions and profiles of the employers in the sector and many of their own employees who hold these jobs. The site will focus first on educating students about the jobs of the future in fields such as informatics, robotics, engineering, the physical sciences, among others. As AgriNovus continues to spotlight the agbioscience sector, this story-telling and exploratory tool will allow the students to understand and see a career option for them within the agbiosciences. Fellow CICP initiative, Ascend Indiana, is leading the project management and career research. The website and related collateral will be complete mid-2019 and ready to be used across Indiana colleges and universities when classes start in the fall.

CONNECT PEOPLE + ORGANIZATIONS Forbes AgTech Summit – Indiana is “at the center of it all”, According to Steve Forbes

The inaugural Forbes AgTech Summit - Indianapolis drew over 500 attendees from across the country in September for a two-day program that included speakers Governor Eric Holcomb, Lt. Governor Suzanne Crouch, Purdue University President Mitch Daniels and AgriNovus President and CEO Beth Bechdol, among others. Forbes has held a similar Summit in Salinas, California the past four years and identified the Midwest as a critical region for expansion. After attending a past AgriNovus event, Forbes not only recognized the strength of Indiana's ag tech assets, but also the leadership and collaboration that AgriNovus could bring to building this franchise in Indianapolis. In addition, the Summit featured a showcase event with 50 start-ups (many that were Purdue-affiliated), tours of Corteva Agriscience and Elanco and a technology Demo Day on the Beck's Hybrids' campus.

Creating New Partnerships – Israel Agbioscience Trade Mission

In May, AgriNovus President and CEO Beth Bechdol was asked to join Governor Holcomb and the Indiana Economic Development Corporation (IEDC) to visit Israel for an agbioscience-focused trade mission. Known worldwide as the



Steve Forbes, president of Forbes Media, and Governor Holcomb discuss Indiana's strengths in the agbiosciences.



Indiana start-up Rogo showcases their innovation to attendees at Beck's Hybrids during Demo Day.

"Startup Nation", Israel is a leader in agriculture technology development. The trip afforded AgriNovus leadership the opportunity to build relationships between Indiana and Israeli agbioscience companies, to build awareness of Indiana's own innovative sector, and encourage Israeli firms to expand in Indiana. Twelve agbioscience leaders joined the Governor and Secretary of Commerce Jim Schellinger at the Global AgriTech Israel conference and an Agrivest start-up/investor event. The group also met with several Israeli agbioscience companies. A Memorandum of Understanding was signed during the trip between Israel and Indiana to continue building a relationship in the agbiosciences and in cybersecurity.

Agbioscience Businesses Locating and Expanding Here

In 2018, AgriNovus played an important supporting role to the IEDC and the Indiana State Department of Agriculture in helping to secure 36 commitments from agriculture and agbiosciences companies to locate or expand in Indiana. Together, these businesses plan to invest \$923 million and create up to 2,713 new jobs in the state. Notable agbioscience commitments included Premier BioSource (swine research/production firm), EnviroKure (liquid organic fertilizer producer), Inari (Cambridge-based seed industry disrupter) and Solinftec (Brazil-based agtech informatics company).



Klein Ileleji, co-founder of Jua Technologies International, gives a pitch-style presentation to over 200 attendees at the Agbioscience Start-up Showcase.

New Partners Invest in AgriNovus Efforts

In 2018, three new board members made investments in AgriNovus – Italtollina, the Northeast Indiana Regional Partnership and the Kosciusko County Economic Development Corporation. Three new Innovation Council members joined AgriNovus – AgReliant Genetics, Wabash Valley Power Association and EnviroKure.

ACTIVATE ENTREPRENEURS Shining a Spotlight on Rising Stars at the Agbioscience Start-up Showcase

AgriNovus hosted its second agbioscience start-up showcase event in partnership with the Purdue Foundry at Launch Fishers to highlight the growing number of agbioscience start-ups throughout Indiana in the leading areas of innovation: plant sciences, animal health, human food and nutrition and high-tech agriculture. Five agbioscience start-ups were featured --Aggressively Organic, The Bee Corp, JUA Technologies International, VinSense Technology, and ZeaVaxx-- and the event brought together over 200 leaders from Indiana's start-up, investor and business communities.

Researching Entrepreneurial Needs and Support

Throughout the year, AgriNovus worked with EntreWorks, an economic development consulting group focused on helping communities, businesses and organizations achieve their entrepreneurial potential, to complete an entrepreneurial ecosystem research project that examined the strengths and opportunities available for entrepreneurs in Indiana's agbioscience sector. The full study will be released in early 2019.

ASCEND INDIANA

Ascend's vision is for Indiana to be a place of economic opportunity for all. To this end, Ascend bridges talent gaps by connecting students to employers, developing career pathways, and providing thought leadership.



Since launching in 2016, 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 research and public policy through data aggregation, analysis and thought leadership.

The initial interest in the Ascend Network and Services has been tremendous, validating Ascend's demand-driven

approach to aligning talent with opportunities throughout the region. In 2018, the number of employers who committed to joining the Network quadrupled, from 39 to 172, and Ascend's recruitment team met one-on-one with over 2,200 college students to support their internship or job search. In addition, the Ascend Services team completed 10 talent development projects in Central Indiana, with 10 additional projects already in motion for 2019. Through these efforts, Ascend has connected nearly 550 people to training, internships, or jobs in Indiana.



Ascend Indiana is CICP's talent and workforce development initiative whose vision is for Indiana to be a place of economic opportunity for all.

ASCEND NETWORK

Connecting Students to Careers

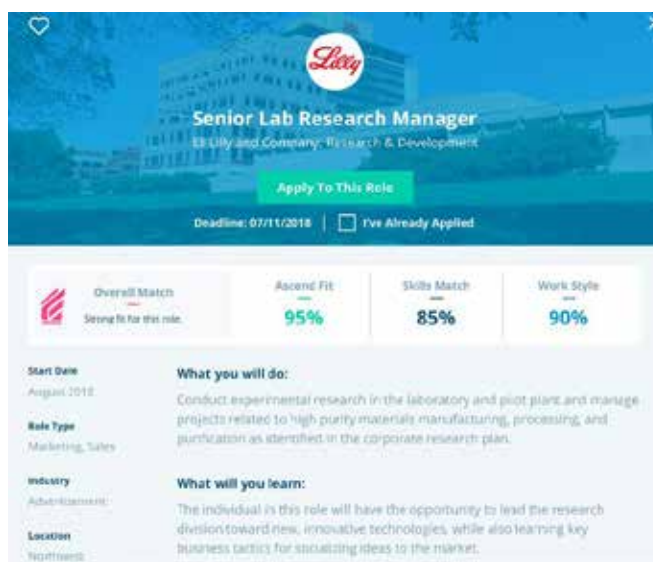
The Problem: Today, only 59 percent of 2016 graduates from Indiana higher education institutions are living in Indiana, and even fewer will remain employed in the state after five years. In addition, traditional workforce efforts lack a focus on students and recent graduates. Yet, early-in-career candidates, especially those from underrepresented backgrounds, benefit from additional support through the education-to-workforce transition. As such, the Ascend Network (Network) seeks to ensure students find meaningful employment and begin their careers in Indiana.

The Strategy: The Network uses an online platform and a team of Ascend recruiters to connect current students or recent graduates who have an associate degree, bachelor's degree, or high-quality certificate to internships, part-time, and full-time jobs in Indiana. Working alongside career services at 14 higher learning institutions around the state, Ascend's team of recruiters meets individually with students and newly graduated job seekers to learn about their skills and interests. Simultaneously, Ascend engages Indiana employers to add their open positions to the platform and helps them fill their early-in-career talent needs.

The Results: Coupled with the support of Ascend staff, the Network's algorithm matches these candidates with opportunities that align with their preferences and abilities. In 2018, the Network supported recruitment for 2,035 internships and jobs and hosted 1,232 student profiles, which



Ascend staff members provide individualized support to students throughout their job or internship search.



Role descriptions from employers are aligned with candidates' preferences and abilities via the Ascend Network.

"Ascend was the missing link in my job search after graduation. After a few months of no luck, I met with an Ascend Indiana recruiter. We found the perfect position for me!"

-Meagan Baker



+



+



resulted in more than 1,000 applications being submitted to employers in the Network. Through the Network, Ascend aims to connect talent to entry-level internships and jobs more efficiently and effectively. By aligning students with opportunities that provide access to the middle class and keeping more talent within the state, Indiana will attract new business and employers, enhancing economic opportunity for all its residents.

ASCEND SERVICES

Partnering With Employers and Educational Institutions to Prepare Students for In-Demand Jobs

While statistics are improving, there are still not enough students enrolling in college, completing their post-secondary education, or concentrating in high-demand fields in the State of Indiana.

Ascend Services (Services) builds solutions to prepare talent for good and promising jobs. Services assists employers by working with them to define the number of available roles and the knowledge and skills required for each position. Together, they identify, evaluate and secure higher education partners to build specific curricula, training experiences and career pathways for students. The students in the academic program receive financial incentives, work and learn experiences, and ultimately, jobs in high-demand roles.

Each completed Services project provides positive community impact through the training of individuals for career paths in Indiana. Completed Services projects directed an average \$10,000 of investment per student to training for good and promising jobs.

Ascend Services projects developed in 2018 include:

Licensed Clinical Social Worker Talent Pipeline: Ascend partnered with Community Behavioral Health at Community Health Network, University of Indianapolis, and Indiana University School of Social Work to build a talent pipeline that will yield up to 30 licensed clinical social workers annually who are dually licensed as clinical addiction counselors. The program, which launches in January 2019, will enhance the

quality and availability of specially trained social workers amidst the Indiana opioid epidemic. This program is expected to invest \$1.5 million in the training of social workers over five years, providing access to high quality treatment for thousands of additional Hoosiers each year.

Ivy Tech Career Development Redesign: Ascend also completed a strategic plan to redesign Career Development for the statewide Ivy Tech Community College system. The project will guide Ivy Tech toward their goals of increasing student internship and career placements, ultimately leading to additional labor market participation. The project culminated in an in-depth plan outlining the process and metrics for completing the Career Development transformation. Once fully launched, this strategy will reach 80 percent or more of the Ivy Tech student population, which consists of nearly 86,000 degree-seeking students.



Ascend Services completed a Career Development Redesign for Ivy Tech Community College in 2018.

RESEARCH AND ANALYSIS

Conducting Research and Data Analysis to Inform Workforce Public Policy

Ascend is committed to conducting research and education that strengthens Indiana's workforce. Ascend utilizes the publication of research and policy briefs, alongside analysis of aggregated data from the Ascend Network and Services, to educate public policymakers. Ascend conducted two projects that will be helpful in efforts to combat the talent gap and encourage higher education.

Talent Supply and Demand Research: Ascend and FutureWorks completed the *It's About the Match: Labor Market Demand and the Supply of Talent in Indiana* report, analyzing the misalignment between open jobs and available talent in Indiana. Indiana is not projected to produce enough graduates to meet the continued growth

in demand for skilled talent. However, by aligning talent with jobs based on a broader definition of skills and competencies, employers can better identify the talent they need and retain a greater number of post-secondary educated graduates in Indiana. The report is publicly available at ascendindiana.com.

Indy Achieves: In early 2018, Ascend developed the fiscal analysis and supported the initial public policy that helped launch Indy Achieves, the Indianapolis Mayor's Office initiative to support low-income children and adults in Marion County toward earning a college degree or certificate. Together with the City of Indianapolis, Ascend researched national college promise programs and convened local stakeholders to determine the best approach for implementing the Indy Achieves program here in Indianapolis. Indy Achieves was announced by Mayor Joe Hogsett in May 2018 and will provide 5,000 scholarships to low-income students in Marion County for programs at IUPUI and Ivy Tech that align with high wage, high-demand careers.

Ascend secured nearly \$12 million in funding from philanthropic, for-profit, and public sources. The board grew to 34 members with representation from key industry and civic leaders, philanthropic organizations and academic institutions.



It's About the Match: Labor Market Demand and the Supply of Talent in Indiana – FutureWorks and Ascend Indiana.

BIOCROSSROADS

A life-changing treatment for bone diseases developed by researchers at the Indiana University School of Medicine received U.S. Food & Drug Administration approval, at the same


time as the Medical School received one of the largest NIH awards in its history to extend the Indiana Clinical and Translational Sciences Institute; Cook Regentec's "collaboratory" expansion at the south side of 16 Tech opened; Elanco was spun out from Eli Lilly and Company through a highly successful initial public offering; and BioCrossroads' third seed fund installment, Indiana Seed Fund III, launched and began to make new investments to fuel Indiana's most promising life sciences start-ups. These were just some of the many notable developments in Indiana's dynamic life sciences industry in 2018.



BioCrossroads, as an organization, was once again lauded as a national leader for its efforts to advance Indiana's life sciences sector by the world-renowned Brookings Institution. Brookings released its *Rethinking Cluster Initiatives*, case study citing BioCrossroads' national best-practices impact as "striking, especially in regards to research and development, growth capital, and industry intelligence gathering."

The state, as a whole, and seven Indiana cities in particular were acknowledged for outsized life sciences activity in Biotechnology Industry Organization (BIO) and TEconomy Partners' bi-annual survey of the U.S. life sciences industry. Indiana was once again recognized as a national leader in life sciences sector employment, with sizeable employment and

industry concentration in the areas of agriculture feedstock and chemicals, drugs and pharmaceuticals, and medical devices and equipment. BIO's *Investment, Innovation and Job Creation in a Growing U.S. Bioscience Industry* report also identified metropolitan statistical areas (MSAs) with significant life sciences activity, including: Bloomington, Evansville, Indianapolis, Lafayette, Michigan City, South Bend and Terre Haute. The Bloomington, Indianapolis, and Lafayette MSAs were cited as having some of the strongest industry performance in the U.S. Indianapolis and Lafayette were named two of only eight cities in the nation with specialized concentration in four of the five life sciences industry subsectors.

A CATALYTIC
STATE
FOR  LIFE
SCIENCES

INnovations



85 new products approved by the FDA

\$115M
venture capital
funding



34
companies
funded

Indiana's innovation and discovery strengths were also featured in the report. The state ranks ninth in the U.S. for bioscience-related patents granted (per 1 million population), and is the third largest exporter of life sciences manufactured products in the U.S.

INVESTING IN THE NEXT GENERATION OF INNOVATION

As a result of the success of Indiana Seed Fund II, one of the most noteworthy developments of 2018 was the launch of BioCrossroads' third seed fund, Indiana Seed Fund III, a \$9 million early-stage fund focused on identifying, creating and developing the next generation of Indiana-based life sciences, health IT, and agbiosciences companies.

Investors in Indiana Seed Fund III include Eli Lilly and Company, Richard M. Fairbanks Foundation, Regenstrief Foundation, Walther Foundation, Indiana University, the University of Notre Dame and BCI, the for-profit affiliate of BioCrossroads which also manages the fund. The fund made two investments in 2018.

Seeking even earlier start-up companies to bolster, BioCrossroads' sixth annual New Venture Competition featured entries from all over the state and included

innovations both affiliated with Indiana research universities and entrepreneurs working on privately-developed technologies. The University of Notre Dame's SalvePeds won the top prize of \$25,000. It is an early-stage pharmaceutical company offering a novel drug as a topical therapy for the treatment of diabetic foot ulcers.

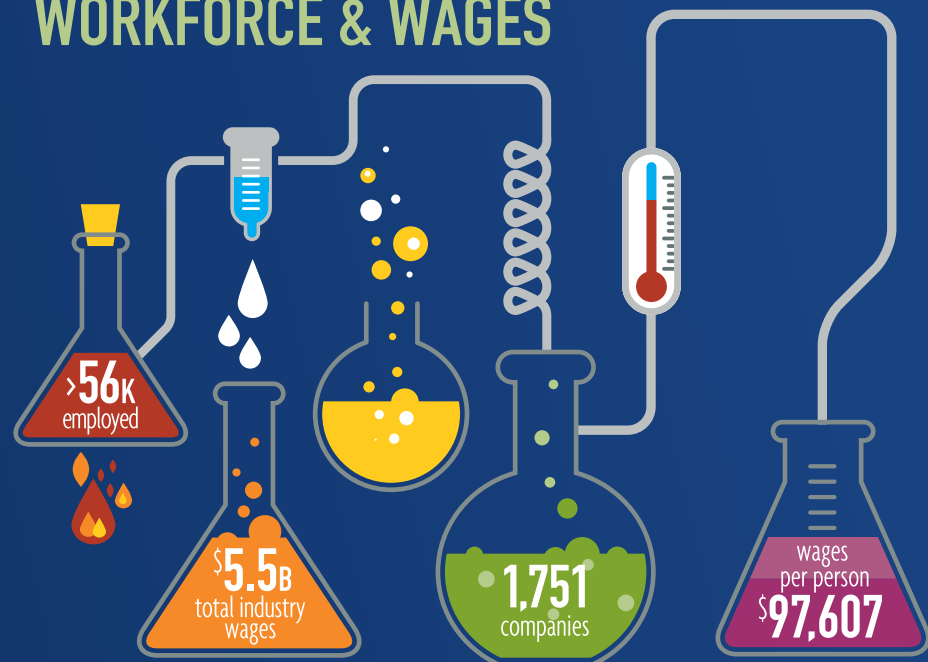
MARKET KNOWLEDGE AND EDUCATION

By all measures, 2018 was a record-breaking year for BioCrossroads with the most attendees and educational events in history, including eight Frameworkx sessions.

At the fifteenth annual Indiana Life Sciences Summit, the focus was on the integration of digital and disruptive technologies into the life sciences. The Summit's Scientific Session was expanded to include a full day of content on metabolic diseases, with speakers from industry and academia discussing their latest research and innovation.

Also, at the Summit, the BioCrossroads Board of Directors recognized esteemed researcher, educator and entrepreneur Anantha Shekhar, M.D., Ph.D., executive associate dean for research affairs at the Indiana University School of Medicine, as the 2018 recipient of the August M. Watanabe Life Sciences Champion of the Year Award.

WORKFORCE & WAGES





A panel of start-up companies discusses integrating technology into the life sciences at the 2018 Indiana Life Sciences Summit.

Adding to its library of publications and reports, BioCrossroads, in collaboration with TEconomy Partners, released two major pieces of research in 2018. One is a significant follow-up study to the 2017 report, *The Importance of Major Research Universities*.

The original report looked at the Indiana impact of the state's three major research universities (Indiana University, Purdue University and the University of Notre Dame) —with collective annual research expenditures of nearly \$1.3 billion. This earlier report found substantial contributions by our state's research universities to nearly every aspect of Hoosier life. However, it also showed that federal sources represent just 41 percent of the total annual research expenditures for Indiana's universities, compared to 55 percent on average for research universities in other states that receive federal grants and contracts.

The new report, *Assessing R&D Funding Across Indiana's Major Research Universities*, reviewed the universities' research and development funding to understand that differential, recognizing that Indiana University and Purdue University

are in the top quartile for federal research dollars. It also compares Indiana institutions to the top universities in the U.S.; identifies how investments made by the institutions themselves affect federal funding percentages; raises observations relating to the type and sources of R&D funding; and makes recommendations for improvements. Overall, each of these universities increased the size of its annual R&D portfolio by \$120 million or more over the last decade—a level of combined growth that is outpacing the U.S.

Also, in 2018, BioCrossroads released another significant report, updating economic impact and jobs projections for the 16 Tech Innovation District: *Economic Impact Update for 16 Tech Innovation District Development -- Data and Findings*. A data-rich analysis, the report provides detailed estimates of 16 Tech's Phase I construction type and square footage, employment categories and numbers of jobs, and overall economic impact.

Throughout the year, BioCrossroads also continued to work with many stakeholder-driven collaborations like

Assessing R&D Funding Across Indiana's Major Research Universities



Prepared by: TECOMY PARTNERS LLC
Prepared for: BioCrossroads
October 2016



The report, *Assessing R&D Funding Across Indiana's Major Research Universities*, analyzed funding opportunities for academic institutions.

the Indiana Health Information Exchange, OrthoWorx, the Datalys Center, the Indiana Clinical and Translational Sciences Institute, and the Indiana Biosciences Research Institute as well as talent-related activities in work with 16 Tech and STEM-related initiatives. And, in November, the Richard M. Fairbanks Foundation funded a new two-year, \$1.48 million grant to BioCrossroads to continue to advance the strength and opportunities of these collaborative and educational initiatives across Indiana's life sciences and healthcare sectors.

In December, BioCrossroads said farewell to its longtime President and CEO David L. Johnson. Johnson led the organization for 14-years, but announced his move to full-time responsibilities as president and CEO of CICP.

Johnson was elected president and CEO of CICP and led both organizations in shared capacities since December 2012. Johnson is responsible for several game-changing contributions to the Indiana life sciences industry, including raising nearly \$400 million for Indiana's life sciences opportunities, organizing and spearheading the Indiana Biosciences Research Institute and 16 Tech Innovation District development, and forging unique collaborations that have ensured the sector's statewide and national prominence.

Nora Doherty, BioCrossroads senior vice president and managing director of the Indiana Seed Fund, is serving as interim president and CEO until a permanent president and CEO is selected through a national search process later in 2019.

CONEXUS INDIANA

Advanced technologies, automation and data are changing the way Indiana makes and moves things, providing companies with newfound opportunities to increase competitiveness, productivity and profitability. As a national advanced manufacturing and logistics (AML) leader in industry strength and global reach, Indiana is ideally positioned to be at the forefront of this newest Industrial Revolution.



In 2018, Conexus Indiana entered its second decade against this dynamic industry backdrop. The environment was ripe to celebrate a decade of accomplishments while also re-envisioning Conexus Indiana's role in supporting Indiana's AML companies' continued success.

Under the leadership of newly appointed President and CEO Mark Howell, Conexus Indiana embarked on a year-long strategic planning process to map a bold path forward. The plan reflects the input of hundreds of industry, public-sector and education stakeholders, identifies the primary emerging opportunities that will guide continued industry success and outlines Conexus Indiana's role in the 21st Century AML innovation economy.

At the same time, Conexus Indiana delivered its legacy programs to high school and post-secondary students throughout the state and further refined its curriculum and networks with academic and industry partners.

Two Conexus Indiana networked communities – the Conexus Indiana Automotive Council and the Conexus Indiana Logistics Council – advanced two programs in 2018 that strengthened statewide talent and transportation initiatives. The Conexus Indiana Automotive Council helped spearhead the adoption of INvets as the State's platform for its Next Level Veterans program, which resides in the office of the Lt. Governor. The Logistics Council also helped solidify a relationship with the Joint Transportation Research Program (JTRP) at Purdue University to incorporate industry input into their work.

ALIGNING FOR CONTINUED GROWTH

Conexus Indiana engaged outside consultants to help develop an industry-driven strategic plan. The "Powering Industry 4.0" plan builds on Conexus Indiana's proven network of stakeholders and introduces new and innovative programs and resources to support the industry's successful migration in productivity and talent development.

Perhaps one of the most innovative and impactful strategies to emerge from the strategic plan is the development of an Industry 4.0 Institute. The Institute will provide a pathway for the manufacturing and logistics sectors toward digital transformation and ignite a spark for innovative new businesses and partnerships.

The plan also encourages Conexus Indiana to expand its industry-led network to represent the current and developing needs of the more than 11,000 AML companies in Indiana. When fully developed, the networked communities will include hundreds of industry, academic and public-sector stakeholders that represent AML companies across a broad spectrum of industry sub-sectors. Together, they will take purposeful collective action to strengthen the state's industry ecosystem.

Additionally, Conexus Indiana will evolve its program offerings to proactively address the impact of automation and support employment opportunities within the



advanced industries. Programs will be tailored for high school, post-secondary and working adults to ensure skill-based learning opportunities exist for all workforce levels. Programs will expand to include apprenticeships and opportunities to earn credentials and post-secondary degrees that are necessary to succeed in the rapidly evolving AML industry sectors.

The plan also calls for Conexus Indiana to launch and manage a public awareness campaign that illustrates the strength and importance of AML to Indiana's economy and the opportunities they provide for meaningful career pathways.



Conexus Indiana President and CEO Mark Howell visits Stu Kaplan of Makuta Technics, a Shelbyville, Ind. manufacturer that has embraced Industry 4.0.

FORTIFYING THE FOUNDATION

Conexus Indiana took significant steps in 2018 to align its board of directors and internal staff to deliver on the strategic plan recommendations.

Conexus named eight members to its board of directors in 2018, ending the year with 15 statewide members from industry, civic and academic institutions who will guide the organization's mission to accelerate, promote and grow Indiana's AML economy.

Two senior executives joined Conexus Indiana to support specific strategic initiatives. Elizabeth Hagerman, Ph.D.,



Elizabeth Hagerman, Chief
Innovation and Strategy
Officer, Conexus Indiana



Brad Rhorer,
Chief Talent Programs
Officer, Conexus Indiana

formerly vice president for Rose-Hulman Ventures at Rose-Hulman Institute of Technology, joined as chief innovation and strategy officer, and Brad Rhorer, formerly senior manager of human resources at Subaru of Indiana Automotive, Inc. (SIA), joined as chief talent programs officer.

AMPLIFYING LEGACY PROGRAMS

As Conexus Indiana advanced its strategic planning process, the organization continued to deliver and amplify many of its workforce development programs that aim to develop an eager, skilled and ready-to-work talent pipeline.

Since 2015, Conexus Indiana has placed nearly 900 high school students in the Conexus Interns Program at more than 150 AML host companies. Last year alone, 271 Conexus Interns worked at 81 host companies, with a majority of the students indicating they finished their 6-week paid summer internship program more interested in a career in AML and with plans to explore post-high school pathways that could lead to a career in these sectors.

During the school year, Conexus Indiana continued to partner with high school teachers and students to deliver the Hire Tech curriculum. In 2018, Conexus Indiana focused on supporting classrooms, schools, and partnerships with strong stakeholder engagement to develop and advance the best teaching and learning of AML content.

Since its inception in 2012, Hire Tech curriculum has reached more than 8,500 students who have earned a total of 6,585 industry credentials and 19,386 dual credits worth an estimated \$2.7 million. Students who have completed

CONEXUS INTERNS PROGRAM PLACEMENT



Since 2015

~**900** high school students



>**150** AML host companies



2018

271 high school students



81 AML host companies

Hire Tech curriculum, also receive hiring preference from 45 committed industry partners.

At the post-secondary level, Conexus Indiana hosted nearly 150 college students for case competitions, where students formed 36 teams and participated in the Logistics Case Competition and the Automotive Case Competition. The team from Earlham College took home first-place honors in the Logistics Case Competition and the student team from Purdue University Fort Wayne won the Automotive Case Competition.

The case competitions provide opportunities for students to apply the principles they learn in the classroom to solve real-world business challenges facing logistics and automotive manufacturing companies. The students practiced teamwork, critical thinking and problem-solving skills. The events also served as the backdrop for Conexus Indiana to promote exciting career opportunities available in these industries and provide networking opportunities with many of the state's most prominent industry executives.



Conexus Interns participate in an activity at the 2018 Interns Summit on IUPUI's campus.

Indiana's AML industries are poised for a bright future with a goal of seizing the opportunity offered by advanced technologies, and Conexus Indiana is well-positioned to sustain leadership and growth for these critical sectors for the next generations.

PAVING THE WAY TO INDUSTRY 4.0

Significant progress was made to define the purpose of the Industry 4.0 Institute, prepare to launch a 2019 image and awareness campaign and determine the feasibility of the Rapid Reemployment for Advanced Manufacturing Positions program (RAMP), an entry-level manufacturing training program, now known as "Catapult Indiana" (Catapult), across the state.

In hiring Hagerman, Conexus Indiana secured a leader to spearhead the development of the Institute and conduct peer benchmarking to determine states and regions that have successfully driven similar industry innovation efforts.

For the image and awareness campaign to take shape, Conexus Indiana built a new section of its website for industry stories and launched a newsletter, both of which will evolve to become robust tools to support public education efforts in 2019.

The vision of Catapult is to attract and develop unskilled workers into high-quality talent for production roles and to position them for long-term career opportunities in manufacturing. In 2018, Conexus completed a feasibility study that analyzed the demand, structure and associated funding requirements for a statewide launch of the program. Results of the feasibility study affirmed its necessity and directed a path forward for the program.

In its ongoing effort to embrace the future, Conexus launched the Andre B. Lacy Vanguard Award to honor Hoosier leaders who champion the AML industries, advocate

for civic and philanthropic leadership, and demonstrate visionary perspective that challenges the status quo. F. Joseph Loughrey, chairman of Hillenbrand Inc. and the Lumina Foundation and longtime AML champion, was the inaugural award recipient.

The award was presented at the Conexus Indiana annual breakfast event held in partnership with the *Indianapolis Business Journal*. The breakfast was another 2018 focal point that allowed the organization to elevate the conversation around how technology is transforming the way we move goods. The event, *Advanced Manufacturing and Logistics: Indiana's Innovation Economy – Exploring Transportation Megatrends*, was held in June in Indianapolis. More than 500 influencers and thought leaders heard from an engaging group of speakers, including keynote Henry Maier, president and CEO of FedEx Ground, and panelists Tom Linebarger, chairman and CEO of Cummins; Lee Bauer, vice president, Mobility Architecture of Aptiv PLC; Indiana Department of Transportation Commissioner Joe McGuiness; Darcy Bullock, head of the Purdue Joint Transportation Research Project; and moderator Brandye Hendrickson, administrator of the Federal Highway Administration.



Panelists at Conexus Indiana's summer industry event held in partnership with the *Indianapolis Business Journal* discuss the sector's future at *Advanced Manufacturing & Logistics - Indiana's Innovation Economy*.

ENERGY SYSTEMS NETWORK (ESN)

In 2018, Energy Systems Network (ESN) continued its mission to support advanced energy technology solutions in the State of Indiana and beyond. With the addition of a number of grant funded projects and new team members, ESN and its partner companies focused on initiatives in electrification; connected and autonomous vehicles (CAVs); energy storage systems software; and battery testing, validation, and manufacturing.



IEDC GRANT FUNDING AWARDED

In order to continue its support of innovation in advanced energy technologies and establish industry thought leadership in Indiana, ESN partnered with the Battery Innovation Center (BIC) to apply for a grant through the Indiana Economic Development Corporation's (IEDC) Innovation and Entrepreneurship Program. The program seeks to identify and establish more public-private partnerships and collaborative programs to support several identified industry sectors, including energy and advanced materials, smart transportation and logistics, and technology (Internet of Things, "big data," etc.). In

the spring of 2018, ESN and BIC were awarded \$5.2 million through this program over a two-year period. The scope of work is separated into three categories and nine distinct projects.

All nine projects successfully kicked off in 2018, with staff members establishing project charters, assembling expert project teams, and recruiting high-level partnerships to move the initiatives forward. Most notably, ESN and BIC are working closely with IEDC leadership to attract national and global companies to bring their operations and new employment opportunities to Indiana.



COLLABORATE

Execute commercial pilot projects that showcase Indiana technologies

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



CONVENE

Industry engagement and technology roadmaps

- Global Autonomous Technology Expo
- Energy Storage Technical Conferences at BIC



GROW AND ATTRACT

Assist current and future Indiana companies to scale-up or expand into new markets

- Business Incubation and Support for Start-Ups and Corporate Ventures
- Product Testing, Validation, and Manufacturing
- Marketing and Business Attraction

MOVING FORWARD PROGRAM

The Moving Forward Program was designed, in partnership with the Indiana Housing and Community Development Authority (IHCDA), to create energy efficient affordable housing that improves quality of life while decreasing the cost of living for



low- to moderate-income individuals and families. Six developments are currently in various stages of progress: Bloomington, Fort Wayne, Indianapolis, Lafayette, Gary, and East Chicago. In 2018, Bloomington and Lafayette broke ground; Indianapolis acquired its project site and will begin construction in Summer 2019; and IHCDA awarded tax credits to the two developer teams for the projects in Gary and East Chicago in December. ESN's two AmeriCorps VISTA service members support all the developer teams in identifying community-based partnerships and services in support of residents.

MOVING FORWARD RURAL DEVELOPMENT WORKSHOP

For the 2018 iteration of the Moving Forward program, the IHCDA chose to partner with the U.S. Department of Agriculture (USDA) to focus on preserving existing USDA Rural Development (USDA RD) housing properties throughout Indiana. In Moving Forward Rural Development, IHCDA selected three developer-led teams with a goal of preserving at least 10 existing USDA RD properties each. The teams are led by Biggs Development Group, Woda Cooper Companies, Inc., and Justus Companies in partnership with Greystone Affordable Development. In November 2018, ESN facilitated an innovation workshop with IHCDA, USDA RD, dozens of subject matter experts, and the developer team members. Participants focused on ideating around not only advanced energy and mobility technologies to incorporate, but also identifying innovative ways to address healthcare and social services needs across a portfolio of properties.



Local and state leaders break ground on a Moving Forward project in Lafayette.



ESN facilitated a Moving Forward workshop focused on preserving and transforming rural development housing in Indiana.



IHCDA Executive Director, Jacob Sipe, speaks to subject matter experts and developer teams during Moving Forward Rural Development Workshop in Indianapolis.

DISCOVERY PARK DISTRICT INNOVATION WORKSHOP

In October 2018, ESN partnered with the Purdue Research Foundation at Purdue University to hold a two-day innovation workshop focused on brainstorming and planning the future of Discovery Park District (DPD). Encompassing more than 200 acres of development and more than \$1 billion of investment, DPD is set to expand its sense of place over the next decade to include additional research capabilities and infrastructure, corporate offices, mixed-use housing, single family homes, hotel and meeting areas, as well as restaurants, retail, and public spaces – all on the Purdue University campus. More than 40 subject matter experts were brought together to strategize revolutionary initiatives in mobility, energy, infrastructure, community, and quality-of-life, among other subjects.



Subject matter experts strategize on topics including mobility, energy, infrastructure and quality-of-life projects.



ESN facilitated a two-day Innovation Workshop at Discovery Park District at Purdue University.

ESN EXPANDS, ADDS SIGNIFICANT EXPERTISE

ESN added seven new hires, the most in the initiative's 10-year history. With experience in a wide variety of areas including advanced mobility, battery storage, finance, clean energy, Internet-of-Things (IoT), built environment and infrastructure, communications, operations, public policy, non-profit management, and marketing, the team will advance the work from the IEDC, the Moving Forward programs and other ESN projects.



Ben Wrightsman,
Executive Vice President



Matt Peak,
Director of Mobility



Tim O'Hara, Director of
Grid and Infrastructure



Rachel Budreau,
Manager of Operations



Paige Geer,
Communications Specialist



Caroline Kryder-Reid, VISTA Moving
Forward Project Coordinator



Aidan Geissler, VISTA Moving
Forward Project Coordinator

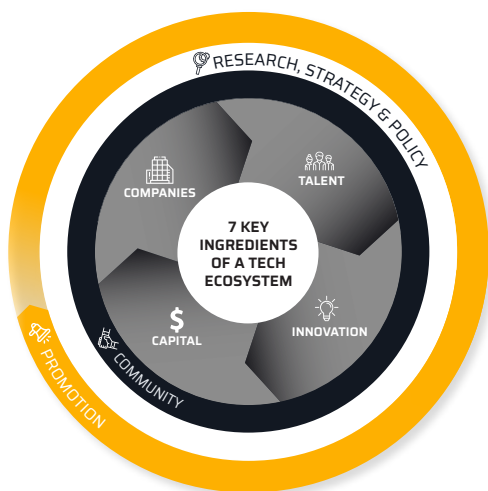
TECHPOINT

2018 was a year of records and newly launched products and partnerships for TechPoint. A record number of companies and universities (79) signed on as members. A record number of college students -- from 43 home states and 120 universities -- applied to come to Indy for internships in the Xtern program, and a record number of employer teams signed up to hire them. A record, sold-out crowd attended the annual Mira Awards gala, and a record number of venture capital firms (40) came from all over the country to meet Indiana scale-up stage companies at the VC Speed Dating event.

TECH INDUSTRY GROWTH

The tech industry continues its rapid growth, as evidenced by the TEconomy report commissioned by CICP, *Clusters & Disruptors: Envisioning Central Indiana's Economic Future in a Time of Change*. According to the report, IT companies generated by far the fastest employment growth from 2010-2016 (67 percent) when compared to Indiana's five other advanced industry clusters. 2016 data shows tech sector employment in Indiana at 40,000 workers, which includes jobs at tech companies as well as technology jobs in other industries.

TechPoint is focused on accelerating the growth of Indiana's tech ecosystem by connecting and amplifying delivery of the critical ingredients below. TechPoint's vision is to be a key platform that helps companies choose Indiana when they are looking to expand or relocate. The Amazon HQ2 bid provided the most significant opportunity to date. TechPoint supported the Indy Chamber with data and program information used in the bid process.



T E


TECHPOINT


MEMBERS




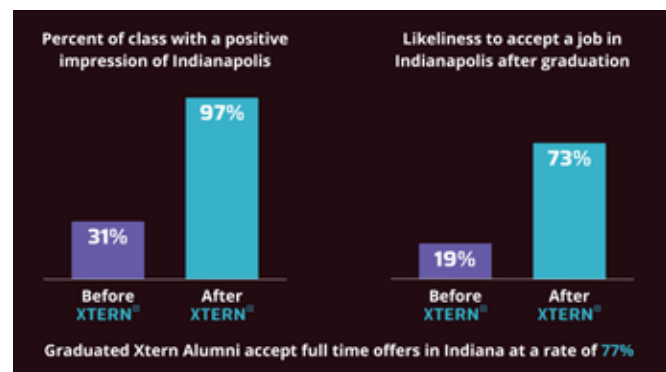
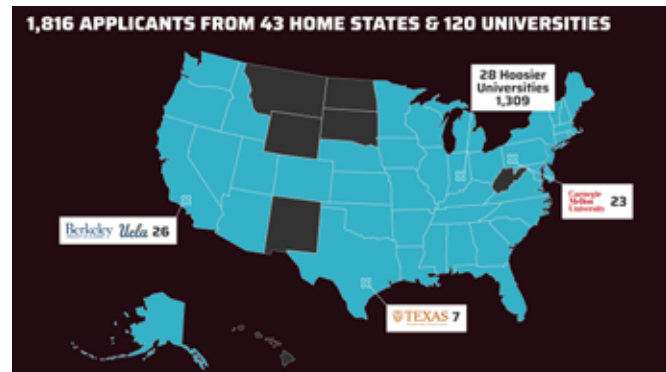
TALENT PIPELINES

The Xtern program completed its fifth year of operation in 2018 and continues to attract talent from all over the country for this “ultimate summer internship experience”. A record 1,816 applicants from 43 home states and 120 universities applied for an estimated 150 spots. Since the start of the program, TechPoint has facilitated 517 Xtern experiences. Before entering the program, surveys have shown that only 19 percent of participants said they are likely to accept a job in Indy after graduation. After the program, 73 percent said they are likely, and of those who receive full-time job offers, 77 percent accepted them.

XTERN  Launched in the fall of 2018 in partnership with IUPUI, Xtern Semester is bridging the gap between internships and full-time employment. IUPUI students accepted into the Xtern program have the option to continue to work for their employer after the summer ends by extending their internship throughout the fall and spring semesters. This concept eases the onboarding costs for employers since they can host talent for a longer duration. Twelve students will pilot this program starting in the fall of 2019.

THE GRID  The Grid is the last stop for graduating Xtern alumni who are looking for or have secured full-time employment in Indiana. New grads have the opportunity to join The Grid to acclimate themselves to Indy, meet friends, and launch their careers. This six-month program includes professional development and networking, social connectivity and civic engagement, all in an effort to increase talent retention.

SALES 
BOOTCAMP The fourth and fifth Sales Bootcamp cohorts were completed in 2018, with a total of 30 participating new grads or career changers receiving sales training and on-the-job exposure to sales and development roles. The program continues to see a high number of applicants and employer interest, with 93 percent of participants receiving job offers upon completion of the program.



ACCELERATING COMPANY GROWTH

2018 included a full year of TechPoint’s membership model, a formal, annual engagement between TechPoint and a tech company, tech-enabled company, university or service provider. Seventy-nine members joined in 2018, which, through a dedicated relationship manager, gave them premier access to TechPoint’s initiatives and programs.

An unprecedented 40 venture capital and private equity firms from 16 states came to Indy for TechPoint’s VC Speed Dating event. TechPoint facilitated 250 meetings in one day between investors and 43 Indiana scale-up stage companies. These meetings have a positive track record from prior years of yielding investments in a multitude of Indiana companies.

COMMUNITY BUILDING & PROMOTION

Events continue to be a successful way to increase community engagement amongst individuals in Indiana's tech ecosystem. TechPoint's signature events include the Mira Awards, Tech 25 Awards, and VC Speed Dating.

The 19th annual Mira Awards gala, presented by Angie's List, Infosys and Salesforce, occurred on Saturday, April 28, at the JW Marriott in downtown Indianapolis. It honored 'The Best of Tech in Indiana' with a sell-out crowd of 1,300 attendees. A total of 17 Mira Award winners and seven runners-up were chosen from more than 200 applications.

The fourth annual Tech 25 Awards celebrates a prestigious selection of 25 individuals, who are critical and exceptional performers helping to grow local companies, but who — not being the CEO or other top executives — don't get honored publicly as often as they deserve. Held at the Indianapolis Motor Speedway on August 16, the event attracted more than 300 attendees.

DIGITAL COMMUNITY

On the eve of the Mira Awards gala, TechPoint introduced two new products: a new website experience for TechPoint.org to describe the organization and its programs and initiatives, and a new online product called TechPoint Index.

TechPoint Index is the digital platform that hosts TechPoint's stories, Job Board, Tech Directory and Community Events channels all under one brand and one user-friendly website. In 2018, it included 230 original stories; 1,500 job postings from 150 different companies; more than 650 tech company directory listings; and over 130 community events hosted on behalf of the tech ecosystem. Registration is available at <https://techpoint.org/index>.



A record, sold-out crowd attended the annual Mira Awards honoring "The Best of Tech in Indiana."



The Tech 25 honors top performers in a company who are not the CEO or other top executives.

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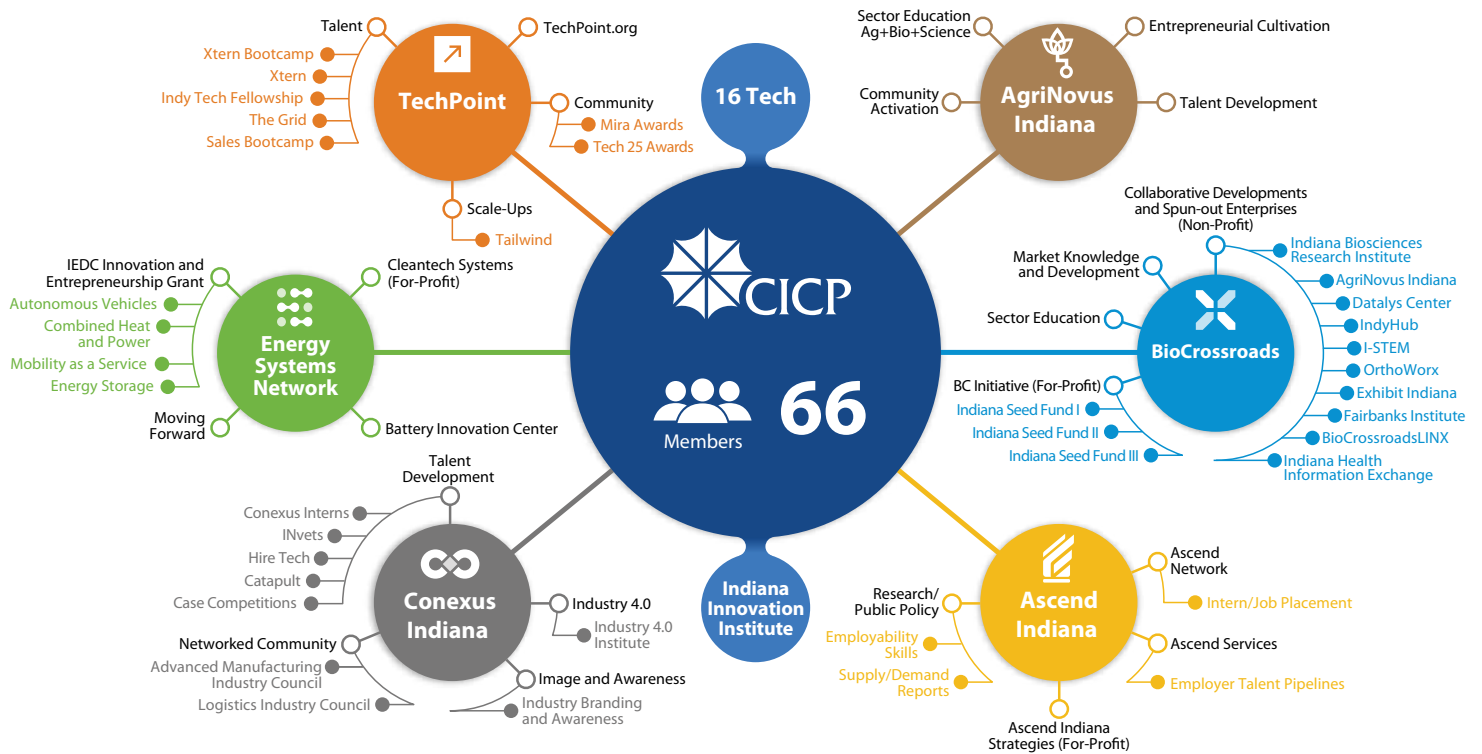
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2018 CICP ENTITIES



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For more information about this report, please contact
Raquel Bahamonde at rbahamonde@cicpindiana.com
or Lori LeRoy at lleroy@cicpindiana.com

111 Monument Circle
Suite 1800
Indianapolis, IN 46204

317.638.2440

www.cicpindiana.com