

Central Indiana Corporate Partnership

2021 ANNUAL REPORT



AgriNovus
INDIANA



Ascend
INDIANA



BioCrossroads®



CONEXUS
INDIANA



TECHPOINT

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LETTER FROM THE PRESIDENT



It's hard to believe that we are still combating the COVID-19 pandemic, some 20 months since the onset. The Central Indiana Corporate Partnership (CICP) has once again risen to the challenges of the moment, while also building for the future. We had glimpses of "normalcy" at times in 2021 – which were both welcome and needed. Unfortunately, they were short-lived; however, we have continued to navigate these ever-changing circumstances by being innovative, collaborative, and getting big things done – traits that we have become known for all over the state.

Our long-awaited Indiana GPS Project with four reports from Brookings Institution and the American Enterprise Institute came to fruition early in the year and provided extensive insights and new data and analysis that have helped and will continue to guide regional and state government, community and industry leaders as they consider their priorities and strategies for growth. More than 400 industry, community and thought leaders across the state played a role in shaping the development of the project, and an even larger number of people participated in one of the several webinars and other events that delivered the key statistics, analysis and recommendations from the Project. In addition, our closest association partners – the Indiana State Chamber of Commerce and the Indy Chamber – are using the findings and recommendations of the Indiana GPS Project as foundational components for their own planning efforts and impact at the Statehouse.

The Business Equity for Indy committee marked one year of organization with an event in October that highlighted important work such as the assembling and convening of five distinct task forces, the launch of a Procurement Roundtable to help companies create supplier diversity programs, the launch of a new website (www.busessequityindy.com) and the publication of regional and statewide data on Indiana's

These past 20 months have taught us... how to respond efficiently, effectively and energetically to the challenges of an unforeseen moment and then pivot to an organized and intentional pursuit of even greater opportunities.

education-to-workforce talent pipelines. More than 80 companies are now engaged with the program, which is a joint venture between CICP and the Indy Chamber, with the support of the Indianapolis Urban League.

We strengthened our partnership with the Indiana Economic Development Corporation (IEDC), and now all of our branded initiatives are engaged with the IEDC in lead generation and market knowledge work, which has resulted in a number of company relocations, expansions and more investment in our advanced industries.

We held our (remarkably) 43rd COVID-19 special member teleconference in December with our board members, state health officials and other key members of our community. This is a number that we never expected to hit, but we are encouraged by the intense participation, interest and concern of our members and others as the pandemic continues to evolve and impact working, learning, playing and living. We remain committed to bring to them information that is authentic, authoritative and current from the front lines of healthcare policy making and delivery.

And our branded initiatives were productive and had real impact in their work, whether it was bringing

stakeholders and leaders together, producing key industry reports, connecting people to jobs or celebrating their industry's movers and shakers.

As one of our long-term CICP Board members shared with me in late 2021, "If CICP were a corporate stock, its value would be trading off the charts – you are making a difference, and everyone knows it." And that is due to the hard work, constant creativity – and good will – of our people and of our members.

I remain grateful for the support and leadership that the CICP members, especially our executive committee and our Board Chair Tom Linebarger, have provided over the last year – not just for our organization, but for our region and our state. Your influence, input, and guidance have helped us weather this storm.

We are also truly grateful for the generous support of Lilly Endowment Inc. which late in the year provided us with a 3-year, multimillion-dollar grant for the scientific, educational and charitable work of CICP, AgriNovus Indiana, BioCrossroads, Conexus Indiana and TechPoint.

These past 20 months have taught us (and prepared us as never before) how to respond efficiently, effectively and energetically to the challenges of an unforeseen moment and then pivot to an organized and intentional pursuit of even greater opportunities. I continue to remain optimistic about the plans that our federated CICP organization has for 2022, and particularly about the endeavors that we will work on together and collaboratively across the organization.

One thing the pandemic and its impact have proven is the privilege we share of living and working in this unique and strong community. Our ability to get things done collectively is truly unlike what peers of mine across the country see in any other place. This is something I have known for a long time. But to see it

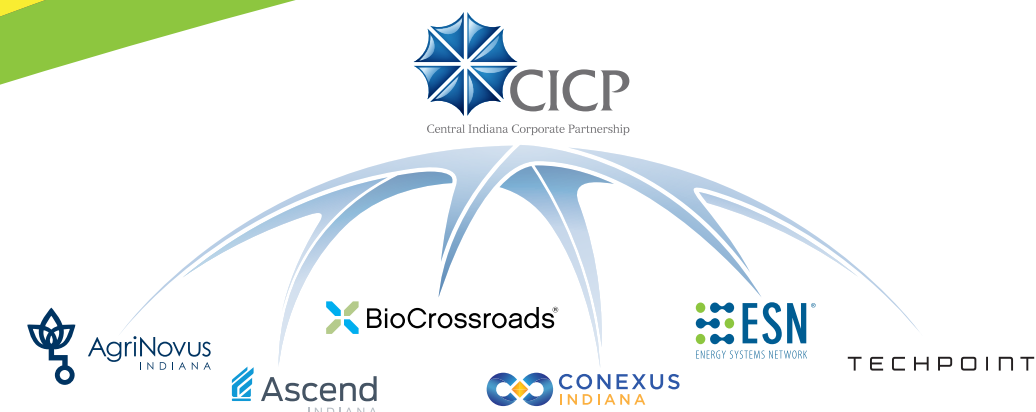
up close and in action over these past 20 challenging months has energized me and affirmed for all of us the crucial value of the important work we do and need to do together. May the New Year be full of opportunity, success and happiness – and bring us each and all many more opportunities to see, work with and enjoy everyone's company in person.



David L. Johnson
President and CEO
Central Indiana Corporate Partnership



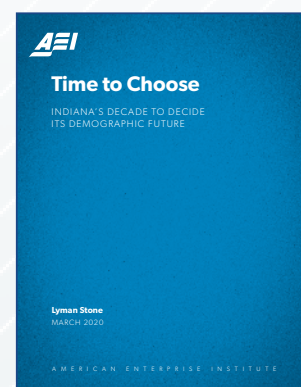
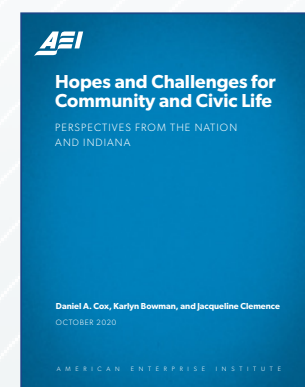
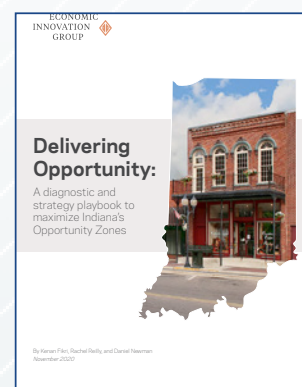
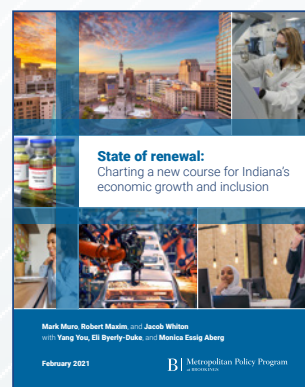
In 2021, the Central Indiana Corporate Partnership (CICP) and its branded initiatives made progress and significant impact through a number of intentional, innovative and collective efforts across industries and throughout the state — all aimed at creating opportunities for economic growth and prosperity.



INDIANA GPS PROJECT

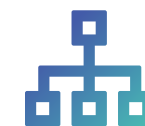
The year kicked off with the launch of the final installment of the Indiana GPS Project study, Brookings Institution's *State of Renewal: Charting a new course for Indiana's economic growth and inclusion*. This study, along with three reports from the American Enterprise Institute released in late 2020, has received a lot of traction with stakeholders, in the media, and as a guide for CICP's future priorities. CICP worked with various groups around the state such as the Indiana Humanities Council, Indiana Philanthropy Alliance, Independent Colleges of Indiana, Ivy Tech Community College, Indiana Talent Network, among others, through webinars and other presentations discussing the findings, reaching more than 700 people across the state.

In addition, local and national media coverage included the *Indianapolis Business Journal*, the *IndyStar* and *WFYI* (NPR radio) as well as Reuters and Bloomberg News.



The analysis and recommendations emanating from the Indiana GPS Project are resonating with policymakers and organizations statewide. This project has helped inform the Indiana State Chamber of Commerce and the Indy Chamber in their strategic planning efforts for the region's post-COVID economy. Several applicants to the Governor's high profile READI Initiative, which encourages communities across the state to work collaboratively on a bold vision to attract, develop and retain talent in Indiana, cited the Indiana GPS Project in their regional development plans. The READI initiative itself was influenced by and consistent with a recommendation offered by Brookings. Brookings' work for the Indiana GPS Project was also explicitly cited in announcing the creation of Equity1821, a new community development financial institution focused on supporting Black-owned small businesses. Finally, newly appointed State Secretary of Education, Katie Jenner, developed a new strategic plan for Indiana's K-12 schools, responding to the GPS findings on the needs for lifelong learning in a changing economy – and named the Department of Education's *Graduates Prepared to Succeed – Indiana GPS* study after the CICP project.

CICP and its branded initiatives will continue to utilize the data and analysis in their work to drive innovation and digitization, boost entrepreneurship and dynamism, and integrate equity and opportunity.



Accelerate digital adoption to drive economic dynamism, productivity, and competitiveness

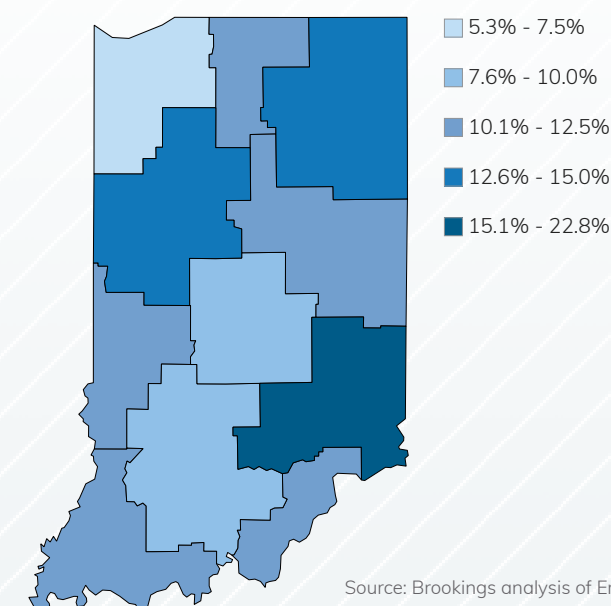


Promote favorable job creation and worker transitions to allow for a beneficial "rewiring" of the economy



Do more to support workers who aren't in good jobs so as to promote economic justice, inclusion, and broadly shared prosperity

Employment share in advanced industries by region, 2019



Source: Brookings analysis of Emsi data.

analytiXin

Another joint project with the engagement of leadership from CICP and BioCrossroads and with significant contributions from Energy Systems Network and Conexus Indiana, AnalytiXIN is bringing together Indiana University, Purdue University, and the University of Notre Dame along with IU Health, Cummins, OneAmerica, Eli Lilly and Company and Anthem to spur the development of strategic academic-industry collaborations around advanced data sciences and analytics. With funding support from Lilly Endowment Inc., significant progress was made in 2021 to begin to recruit significant university talent and to overall strengthen the digital community, including the development of key and compelling data assets around life sciences and manufacturing and a place-focused collaboration hub in Indianapolis that will strengthen connections and further encourage engagement of academic data science R&D talent with industry peers to drive sustained innovation.





The Business Equity for Indy (BEI) initiative, a joint venture between the Central Indiana Corporate Partnership (CICP) and the Indy Chamber, in collaboration with the Indianapolis Urban League, completed its first year of activities in October 2021. More than 80 companies and 130 business leaders have participated in the development of BEI and its five inclusive task forces.

Marking the first year of activities, BEI hosted a virtual press event to highlight both individual corporate pledge progress and BEI's collective activities in Central Indiana. Simultaneously, BEI launched its website and social media outlets to continue promotion of upcoming events, activities and programs developed by BEI.

BEI's task forces made great strides to impact racial equity in Central Indiana in 2021 through a number of activities:



Hiring and Promotion

The Hiring and Promotion task force is emphasizing the importance of a sustainable wage and economic stability for people of color. This task force worked with the CICP talent and workforce development initiative Ascend Indiana by using the Ascend Network to find partnership opportunities to expand its talent pipeline to include more employers and more students of color in the Network.



Participation and Procurement

The BEI Procurement Roundtable – a convening of 50 employers interested in enhancing or initiating supplier diversity programs at their organizations – launched

in August and held its first workshop in September. The purpose of the Roundtable, through a partnership with Mid-States Minority Supplier Diversity Council, is to share best practices in supplier diversity; access resources to identify local, diverse suppliers with the capabilities to meet their business' needs; and support the facilitation of their investment to help local, Black-owned businesses to grow and scale.



Learning and Talent

The Learning and Talent task force worked with the Indiana Management Performance Hub (MPH) and other state agencies to obtain and analyze data on educational attainment and post-secondary outcomes of Indiana students of color. The findings indicated that Black and Hispanic residents in the city and state face looming gaps in education opportunities and workforce outcomes compared to white residents at every stage of the education-to-workforce pipeline.



Impediments to Health

The Impediments to Health group launched an Employer Vaccination Playbook to provide education, resources and information to encourage COVID-19 vaccination in the workplace appropriately, effectively and equitably. This task force also organized pop-up vaccination clinics at key IndyGo locations. Additional focus areas for the task force include infant and maternal health, food security and mental health.



Public Policy

In the 2021 Indiana legislative session, this task force focused on several key issues including a budget increase for K-12 education, the passage of police reform, IndyGo transit expansion, and \$50 million in new funding for public health innovation.



In 2021, the 16 Tech Innovation District opened its innovation hub, HqO. The former headquarters of the Indianapolis Water Company is now bustling with three distinct activity centers: the AMP, a food hall and artisan marketplace named to Fodor's *Top New Food Halls in the US*, Machyne, a community makerspace complete with high-tech tools and classes, and flexible office/meeting space powered by 76 Forward's entrepreneurial services. More than 50 companies and 500 people are currently working in the District. In addition to CICP, other leaders in Indiana's key industries of advanced manufacturing, technology and life sciences have located at 16 Tech including the Indiana Biosciences Research Institute, AnalytiXIN, and EMC2, an emerging manufacturing center sponsored by the Indiana Economic Development Corporation and featuring tenants such as GE Additive and Amazon Web Services.



Offers employers, residents and visitors:

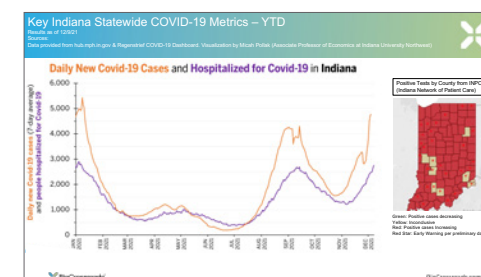
20 restaurants and retailers
50% new concepts
65% minority-owned or led or women-owned or led – or both

Awarded:

>\$1.3M resident-led grants for quality of place activities in the surrounding neighborhoods
300K more to be invested in these efforts through its Community Investment Fund 2022

COVID-19 RESPONSE

CICP was literally “called” to action in 2020 when several board member CEOs requested that CICP organize teleconferences to provide information and guidance at the onset of the COVID-19 pandemic. As COVID-19 has, frustratingly, continued to spread and evolve over the course of the past year, CICP has continued to rise to the occasion in several different ways to ensure that our members and our community are supported and informed by true experts on developments related to the pandemic.



Virtual meetings and calls, task forces, and messaging materials have all been critical ways to connect our members with up-to-date information and provide a forum for understanding responses to the pandemic and paths forward. For example, the “Return to Work” task force of human resources leaders was created in order to share best practices and insight on topics such as the nature of hybrid work environments and policies relating to employees being in the workplace. Similarly, communications have gone out to members with graphics, messaging, and articles that provide facts and figures about the COVID-19 vaccine to share with their employees and the broader community.



IEDC PARTNERSHIP

In 2021, CICP entered into an expanded partnership with the Indiana Economic Development Corporation (IEDC) to provide lead generation assistance and industry-specific market knowledge in agbiosciences, life sciences, advanced manufacturing and logistics, advanced energy technology and transportation, and technology. AgriNovus Indiana, BioCrossroads, Conexus Indiana, Energy Systems Network and TechPoint have provided valuable resources to the IEDC, in which helped to contribute to a record-breaking year in economic development in Indiana with nearly 300 companies committing to locate or expand in the state.

Continued impact and momentum were on full display in 2021, as AgriNovus Indiana focused on new industry connections, fostering a diverse and growing ecosystem of entrepreneurs and thought leadership from a wide group of agbioscience industry professionals. In a pandemic-driven hybrid world, the organization's programming was successful in its efforts to engage others where they were – whether virtually or in-person.

That programming came together in support of **GROW2024**, the newly unveiled AgriNovus framework that aims to add \$4 billion to Indiana's agbioscience economy by 2024 through the sector's four leading platforms: plant science, value-added food and nutrition, animal health and nutrition and high-tech agriculture.



COVID-19 Food Supply Chain Study

In collaboration with Purdue University and EY-Parthenon, AgriNovus released *Resilience Through Disruption*, a study that found aggregate losses from the global pandemic cost Indiana food producers an estimated \$500 million and highlighted a food supply chain going through disruption and evolution at the same time.



Job Board Launches + Field Atlas

The Job Board was launched in May to connect Indiana-based agbioscience employers to a growing talent pipeline in search of career opportunities that make a difference. This new resource was widely used by 13 Field Atlas Ambassadors on college campuses across Indiana, connecting students to traditional and allied careers in agbioscience.

Indiana on the Move

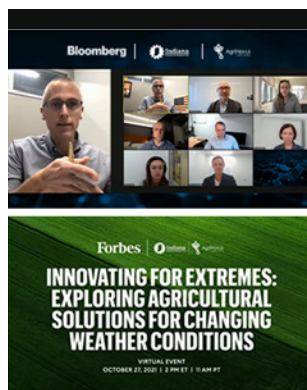
Several companies chose Indiana as their business growth or relocation destination, a collaborative effort between AgriNovus and the Indiana Economic Development Corporation (IEDC). This includes IntelinAir, Bion Environmental Technologies, Gen3Bio, NanoBio Designs, Ninth Avenue Foods and CANPACK Group, among others. Significant investments were made in Indiana by Market Wagon, True Essence, FloWaste, Beck's Hybrids and more.

In addition, AgriNovus, alongside Indiana agbioscience business leaders, traveled to California and North Dakota in 2021 to meet with innovators and companies in an effort to grow Indiana's agbioscience economy.



Producer-Led Innovation Challenge

The Producer-Led Innovation Challenge, presented by the Indiana Corn Marketing Council and Indiana Soybean Alliance, sought to inspire innovators to create software that would enable farmers to quickly aggregate the complex multi-year, multi-source data sets required to participate in Carbon markets. Team Regrow was selected from a pool of university, startup and tech company teams that participated. They were awarded \$25,000 from Purdue Foundry as well as a suite of professional services from The PLAID Agency and Sikich LLP.



Thought Leadership + National News

From food traceability to artificial intelligence (AI) and climate solutions in agriculture, AgriNovus participated as featured guests in virtual events with national media outlets such as Forbes and Bloomberg.

To gauge thought leadership performance against similar and competitive organizations across the U.S., AgriNovus committed to publicly reporting its share of voice, a measure of brand awareness across traditional and digital media platforms, for the first time in 2021 – scoring a total of 42% for the year and exceeding their 30% benchmark.

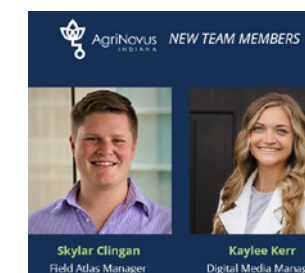


QUADRANT Returns

A quarterly convening series, AgriNovus reintroduced QUADRANT into its event lineup in 2021. Focused on the four platforms of Indiana's agbioscience sector – plant science, value-added food and nutrition, animal health and nutrition and high-tech agriculture, the first three events were hosted virtually, and the series concluded with an in-person event in collaboration with Purdue University.

Team Additions

Skylar Clingan was hired as Field Atlas Manager in February, cultivating relationships with companies and students to expand the state's agbioscience talent pipeline. Kaylee Kerr was added to the team in September as Digital Media Manager, continuing the ongoing conversations for both the AgriNovus and Field Atlas digital platforms.





Ascend Indiana is committed to making the state a place of economic opportunity for all. Ascend's work to help thousands find the right job in Indiana is made possible through many generous funders. In 2019, Lilly Endowment Inc. made a \$12.75 million grant to the CICP Foundation to help Ascend scale its efforts. Since then, Ascend has raised an additional \$11 million, including a \$5.25 million match in 2021, made possible through the Lilly Endowment grant, as well as contributions from 45 employers, community partners, and other local and national philanthropies including EmployIndy, Eli Lilly Foundation, JPMorgan Chase, Central Indiana Community Foundation's Glick Fund, and the McNulty Foundation.

Ascend Network

With the **Ascend Network**, an innovative job matching platform, Ascend helps job seekers find good and promising careers that match their interests and skills, while supporting Indiana employers in their efforts to find and hire qualified candidates. Progress in 2021 included:

Scaled the growth and adoption of the early-in-career Network across Indiana.



Ascend secured **5** new higher education partnerships – Ball State University, Indiana State University, Indiana University, Grace College, and Purdue University – bringing the total number of partner institutions to **37**. In addition, Ascend has formalized comprehensive data sharing agreements with **16** of those institutions that enable Ascend to more directly support underrepresented students.



Ascend staff held **2,700** one-on-one meetings with students to discuss their skills and guide them through the internship and job search process. To date, Ascend has held **12,000** meetings to connect individuals with career opportunities through the Network. Of the students Ascend has met with, **55%** are from underrepresented student groups.



Ascend expanded employer relationships to **600**, an increase of **150** since 2020. New employers span different industries, sizes, and geographic locations across the state, providing a more robust view of the employment landscape.

Completed an update of the Ascend Network technology. The updated Network infrastructure, which includes improved accessibility to the website for those with disabilities, makes it easier and more efficient for users to find a job. It also enables Ascend to expand statewide partnerships to serve additional employers and job seekers across Indiana.

Established education and workforce partnerships to serve new populations. By working with EmployIndy, populations served by the Network now include dislocated workers through Rapid Re-employment Response, which has served **500** individuals, and high school students through Modern Apprenticeship, which has connected the first cohort of **30** apprentices with work-based learning opportunities.



Ascend Insights

Ascend Insights conducts labor market research, analyzes best practices, and shares resulting understandings with key stakeholders to inform public policy and positively impact individuals throughout the state. As part of these efforts, Ascend supported the creation of the **Business Equity for Indy (BEI) Learning and Talent Opportunities Taskforce** report on racial inequities in the city. Ascend also participates on the BEI Hiring and Promotions Taskforce.

Ascend Services

Through **Ascend Services**, the initiative provides consulting and capacity building to develop innovative strategies that meet high-demand workforce needs and serve as an intermediary that catalyzes transformative partnerships between employers and talent providers. Progress in 2021 included:

Modern Apprenticeship Talent Pipelines and Community

of Practice. The first Central Indiana cohort of **30** modern youth apprentices began their apprenticeships with **16** employers in Fall 2021. Notably, Ascend received **\$1 million** from the Partnership to Advance Youth Apprenticeship to expand Indiana's network of pilot sites and provided three initial awards. Through this effort, Ascend and its partners will chart the path for meaningful youth apprenticeship opportunities statewide.



Community Behavioral Health Academy Extension

Program. Ascend and Community Behavioral Health (CBH) have developed an internal training program to upskill existing behavioral health caregivers with the knowledge, skills, and abilities needed to provide holistic, co-occurring mental health and substance use disorder (SUD) treatment to more clients. This program complements the CBH Academy, which will train new professionals and career changers.

Coalition for Homelessness Intervention & Prevention. The Coalition for Homelessness Intervention & Prevention (CHIP) dedicates staff and technical experts to the implementation of coordinated community efforts to prevent and end homelessness. Finding, hiring, and retaining high-quality social workers in the homeless service field can be challenging, so Ascend worked in partnership with CHIP to develop a talent strategy to recruit and retain professionals for their many efforts.

Services is also working on projects alongside partners such as Community Health Network, Early Learning Indiana, Foellinger Foundation, Ivy Tech Community College, and United Way of Central Indiana.



analytiXin DRIVING INNOVATION

BioCrossroads has been spearheading AnalytiXIN since late 2020. AnalytiXIN is Indiana's place-focused collaboration to drive sustained innovation by connecting university assets and talent with industry in the areas of data sciences, including digital, artificial intelligence (AI) and advanced analytic capabilities with a focus on life sciences and manufacturing.

In 2021, BioCrossroads achieved three major milestones while moving the project forward.

- Establishing a commonplace. BioCrossroads engaged with Indiana University, Purdue University and the University of Notre Dame — to bring them together at 16 Tech with a dedicated and shared space at the AnalytiXIN office at HqO. Notably, the AnalytiXIN commonplace is Notre Dame's first and only location in Indianapolis.
- AnalytiXIN grant funding led to the recruitment of four new faculty members at the universities — three at Notre Dame and one at Indiana University.
- The AnalytiXIN Health Data Asset received a major boost with in-kind and financial support committed by Eli Lilly and Company and IU Health. These commitments, along with the leadership and support from the Indiana Biobank within the Indiana University School of Medicine, and the Indiana Health Information Exchange (IHIE), provide the foundation for asset development.

Capital Strategy

BioCrossroads' Indiana Seed Fund program has invested in 32 companies since its first fund launched in 2005. Those 32 companies have gone on to raise nearly \$600 million. In 2021, Indiana Seed Fund III invested in Kovina Therapeutics, which is developing a treatment for ovarian cancer. The fund also made secondary investments in Gate Neurosciences, Scioto Biosciences, Novosteo and Lumavate.

32

Indiana start-up companies since 2005 launch

~\$600M

raised by those 32 companies

\$23.25M

assets under management

ENCOURAGING LIFE SCIENCES TALENT

Career TraX a project that showcases Indiana's early-in-career life sciences jobs by profiling talent and companies on the BioCrossroads website launched in the third quarter. The page connects to the Ascend Indiana website to register career seekers. The site drives awareness about Indiana's life sciences industry to university students and other job seekers as a way to retain more talent in Indiana.

Events

FrameWORX

BioCrossroads hosted six FrameWORX sessions; three events were focused on COVID-19 related topics:

- ▶ Valuable Lessons Learned from Indiana Universities' COVID-19 Response
- ▶ Indiana's Logistics and Life Sciences Sectors Work Together to Turn a Vaccine into Vaccinations
- ▶ Emergency Use Authorization for COVID-19
- ▶ Tech Transfer in Indiana: The Road to Commercialization
- ▶ A Look at Indiana's Emerging Radiopharmaceutical Industry
- ▶ ESSENTIAL: The Impact of the Healthcare and Life Sciences Sector in Central Indiana

INDIANA LIFE SCIENCES SUMMIT 2021

2021 marked the 18th annual Indiana Life Sciences Summit. A virtual event for the second year in a row, the conference focused on what the life sciences industry has learned over the last 18 months, particularly in the areas of inclusion and collaboration. Dr. Pete Kissinger, notable academic, researcher and founder of Bioanalytical Systems Inc., was recognized as the 2021 Watanabe Life Sciences Champion of the Year.

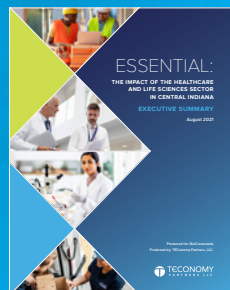
2021 IN LIFE SCIENCES EXPORTS
\$12,766,690,010

3RD highest in the U.S.

\$79^B *
state economic impact

>\$216K
exports per worker

BioCrossroads released four life sciences market reports in 2021:



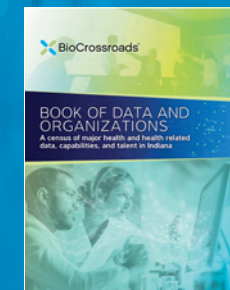
ESSENTIAL: The economic impact of Central Indiana's healthcare and life sciences sector discusses not only the economic measures of capital expenditures, wages and jobs, but also analyzes the non-traditional impacts such as access to healthcare and its influence on economic development.



Indiana Life Sciences Capital 2020 provides details on the funding events from a variety of sources including Small Business Innovation Research (SBIR) and Small Business Technology Transfer (STTR) awards, venture capital, initial public offerings and related public offerings, and mergers and acquisitions.



Supporting Life Sciences: A Look Back at BioCrossroads' Capital Strategy report illustrates in detail the journey of organizing, developing and managing seed-stage and venture capital funds from 2002 to 2021.



Book of Data and Organizations – a fourth edition directory of Indiana enterprises in the health-data intersection – including information on Indiana's industry, government, health systems, academia, and digital health startups that have tremendous data and technology resources which are driving transformative healthcare and life sciences work locally and globally.



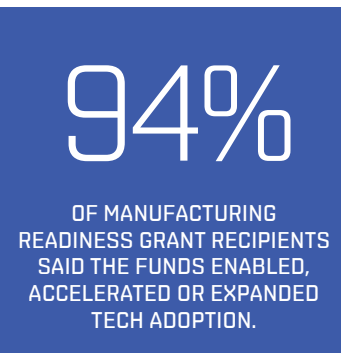
Conexus Indiana strengthens Indiana's competitive advantage in advanced manufacturing and logistics through its dynamic network of industry, education and public-sector partners. As the pandemic and resulting supply chain issues sought to claim large shares of resources and energies in the past year, Conexus helped employers band together and respond to the immediate crises while also preparing the state to emerge from this era stronger and better prepared for the future.

Working for the Future

While the pandemic and supply chain weaknesses demanded attention in 2021, Conexus Indiana did not let those crises distract it from equipping the state to continue its advanced manufacturing and logistics leadership. This effort was led by President and CEO J. Mark Howell until June, when he retired and former General Motors executive Fred Cartwright stepped up to continue the work of urging the state's makers and movers forward. Cartwright's experience powering innovation at GM and leading the Clemson University International Center for Automotive Research prepared the Indiana native well for the task of compelling modernization in the sectors that fuel nearly one-third of the Hoosier state's economy. To guide this effort, Conexus Indiana in 2021 forged a three-year strategic plan focused on increasing manufacturers' productivity, entrepreneurship and aligning talent programs to an Industry 4.0 economy.

Advancing Industry

The continued emergence of Industry 4.0 demands that Indiana makers and movers modernize. To that end, Conexus Indiana provides advanced manufacturing and logistics firms with data, financial resources, networking opportunities and information that support the adoption of new technologies. Conexus Indiana's Emerging Technology Showcases allowed employers to experience new technology and see how it has been put to work in operations like theirs, and connected them with credible resources for those solutions. In addition, Conexus Indiana partnered with the Indiana Economic Development Corporation to distribute a total of \$16.5 million in Manufacturing Readiness Grants to help 202 companies in 58 counties acquire and deploy smart, innovative and emerging Industry 4.0 technologies and systems. These efforts clearly have borne fruit: A study released in late 2021 showed that the percentage of firms implementing or piloting Industry 4.0 technologies doubled from 2020 to 2021 among the nearly 140 survey respondents, and 94% said the grants enabled, accelerated or expanded their tech-adoption projects. Companies are incorporating machine vision, big data and analytics, additive manufacturing, sensor technology, cobots and more into their operations.



Cultivating Talent

Equipping Indiana to compete in the coming years will require the addition of thousands of trained Hoosiers to the advanced manufacturing and logistics marketplace. Conexus Indiana is leading this charge with a

suite of solutions that meet potential employees where they are, whether they are students preparing to join the workforce or adults seeking better futures. For example, Catapult Indiana pays participants while giving them hands-on, real-world training in a 160-hour course. With a 70% graduation rate and a 90% placement rate for graduates, the program is serving the needs of both employers and workers. High school students also have the option of participating in the Modern Apprenticeship Program, which prepares them for the workplace with paid experience while also offering college credit. Future advanced manufacturing and logistics leaders benefited from Conexus Indiana programs such as its National Collegiate Case Competition, Rising 30 and Emerging Leaders. To promote such programs, Conexus Indiana launched Make IN Move, a public awareness campaign that connected with thousands of young Hoosiers online and through social media platforms.

Meeting Challenges

Even as it worked to lead Indiana's advanced manufacturing and logistics firms into the future, Conexus Indiana also helped them address the ongoing pandemic. As companies considered when to return to work, how to create a safe workplace and more, Conexus Indiana served as a convener, leader and resource. It brought together industry leaders from around the state to shape and sharpen back-to-work best practices, and it helped companies set up on-site clinics that resulted in more than 17,000 Hoosier workers and their families receiving COVID vaccinations. As the pandemic exposed flaws in the supply chain, Conexus Indiana again convened leaders to forge and share solutions. Working with Butler University, Conexus Indiana and industry leaders provided a strong foundation for essential supply chain improvements, and the organization established itself as a public leader in efforts to repair supply chain flaws exposed by the pandemic.





Energy Systems Network (ESN) is focused on the development of the advanced energy technology and transportation sectors. In 2021, ESN moved a number of major projects forward including the Indy Autonomous Challenge (IAC) and Together in Motion Indiana, which were made possible by strong partnerships with the Indiana Economic Development Corporation (IEDC) and Toyota Mobility Foundation, among others.

● INDY AUTONOMOUS CHALLENGE POWERED BY CISCO

Organized by ESN and the Indianapolis Motor Speedway (IMS), the Indy Autonomous Challenge Powered by Cisco, was the first high-speed autonomous racecar competition at IMS on Oct. 23, 2021. The historic competition involved 21 universities from nine countries forming nine teams. A goal of the IAC is to advance technology that can speed the commercialization of fully autonomous vehicles and deployments of advanced driver-assistance systems (ADAS). These enhancements will lead to increased safety and performance in motorsports as well as all modes of commercial transportation.

In addition to the historic competition, the IAC held an Autonomous Innovation Summit and a Technology Showcase where IAC sponsors, universities and others exhibited their technology including Boston Dynamics, Luminar, ADLINK, Schaeffler and Bridgestone. AWS (Amazon Web Services) livestreamed the competition on the IAC website and on Twitch. The competition also garnered major global media placements.



TUM Autonomous Motorsport from the Technische Universität München (Germany) took home the \$1 million grand prize at IMS, which was generously donated by Lilly Endowment Inc.

World records for speed for an autonomous vehicle on an oval were set at IMS.

157mph – top speed (PoliMOVE)

139mph – fastest lap (EuroRacing)

135mph – fastest two-lap average (TUM)

● AUTONOMOUS CHALLENGE @ CES

IAC university teams spent the remainder of the year advancing their technology and preparing for the Autonomous Challenge @ CES, the first high-speed, head-to-head autonomous racecar passing competition to be held Jan. 7, 2022 at the Las Vegas Motor Speedway. The competition will be held in conjunction with CES® 2022, the world's most influential technology innovation event.



2,500 attendees
(industry, academia, government)

350 high school STEM students from
51 different school districts across Indiana

35 luxury suites filled

17 IAC sponsors/companies/universities
exhibited technology in IMS garages

300 attendees: Autonomous Innovation Summit
(Governor Holcomb, US Senator Todd Young, Deputy Secretary Don Graves, US Dept. of Commerce, leaders from industry and academia)

● TOGETHER IN MOTION INDIANA

ESN, along with partners Toyota Mobility Foundation and the IEDC, launched the first autonomous shuttle service in Indiana. The free service, operated by May Mobility, is part of the Together in Motion Indiana initiative, which is aiming to foster innovation through industry partnerships and propel research and development in advanced mobility technologies in Indiana.

In June, the autonomous shuttle service launched in downtown Indianapolis on the IUPUI campus and operated through November. In December, the service moved to the City of Fishers and is serving the Nickel Plate Cultural District through the first half of 2022.



The Together in Motion Indiana autonomous shuttle service provided 3,400 rides for Hoosiers in downtown Indianapolis from June-November 2021.

TECHPOINT

Record Year in Tech Investment; Continued Focus on Talent



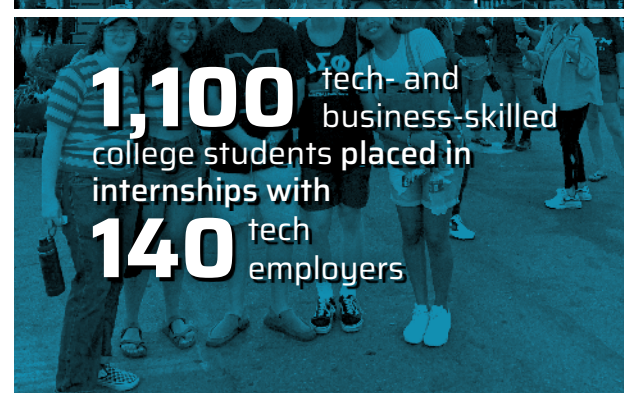
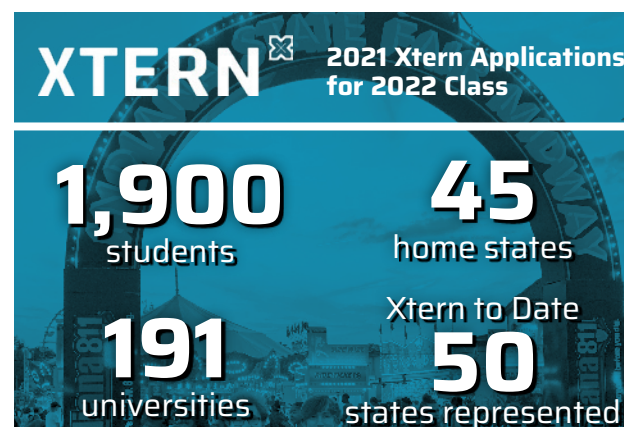
Despite the continuation of the COVID-19 pandemic, 2021 was a year of record-breaking activity and growth for the Indiana tech sector as nearly \$960 million in capital was invested in the ecosystem while at the same time, TechPoint and its partners continued working to grow, attract and retain tech talent in an increasingly competitive landscape. More than 150 tech employers and educational providers around the state engaged and invested in TechPoint programs and events, representing startups and accelerators, global corporations, universities, and training providers. Those groups represent services including software, hardware, IT services, telecom, manufacturing, financial services, agriculture, healthcare, and life sciences. Nearly 185,000 Hoosiers were employed in these tech areas in 2021.

Due to internal restructuring, successful efforts to secure new resources and a new strategic plan, the TechPoint team ended the year the strongest and best positioned it has ever been. As such, it is better able to solidify central Indiana's national reputation as a major tech hub and dramatically increase the number of tech jobs and companies in Indiana.

TALENT



The fight to secure top tech talent is global, and TechPoint continued its focus on recruiting and retaining top tech-skilled students, post-graduates and career changers, primarily through the Xtern program (launched in 2014) which is designed to attract and retain entry level talent while encouraging them to view Indiana as a great place to begin or grow their tech careers, and the Summer Opportunities for Students (S.O.S.) Challenge (launched in 2020). The 2021 Xtern class included 151 students from 20 states, six foreign countries and 35 U.S. universities. Muncie, Ind., became an Xtern "expansion city", with TechPoint helping the Muncie Innovation Connector and area tech employers stand up an Xtern class and summer program. The 2021 S.O.S. Challenge class was composed of 170 students and recent non-profit coding academy graduates.



1,100 tech- and business-skilled college students placed in internships with 140 tech employers

COMMUNITY



Pandemic restrictions on safely meeting in-person curtailed planned activities but didn't stop TechPoint from convening events and encouraging relationship building within the community. TechPoint hosted or supported more than 40 events, including the Mira Awards, the CTO of the Year and Tech 25 awards, two VC Speed Dating events, and many events connecting the Xtern program participants to experts and leaders in the tech industry.

TechPoint also helped promote and plan several events to raise awareness and support for United Way of Central Indiana in an effort to make the tech sector more equitable and to lift up neighbors in need.



The 22nd annual - and second virtual - Mira Awards gala brought together the most diverse slate of judges, nominees and winners in the history of the celebration of Indiana tech. Sixteen award

winners and honorees were chosen from 211 applications. The TechPoint Foundation for Youth used the gathering to launch a fundraising effort to provide digital tools to Hoosier children without access to the Internet or computers at home. Ultimately, the initiative provided 850 laptops, iPads, and hot spots for students.

TechPoint continued to promote the sector's best and brightest, posting 166 articles on TechPointIndex.com, showcasing more than 2,000 tech job openings, promoting 114 tech-related community events and launching a video and podcast series, "The Circuit." The TechPointIndex.com audience grew by about 24 percent.

COMPANIES & CAPITAL



2021 capital investment in Indiana tech shattered all state records, with \$958 million raised, including three of the state's largest capital raises ever. Fifty-seven Hoosier tech companies engaged in merger and acquisition activity.

TechPoint's two VC Speed Dating events brought in 36 venture capital firms from 15 different states representing nearly \$8 billion in investible funds.

TechPoint also continued its partnership with the Indiana Economic Development Corporation (IEDC) in lead development or augmentation of key tech projects in the state. TechPoint worked to identify prospects and met with more than 140 U.S. and international tech company leaders with a goal of securing moves or expansions from six companies by the end of 2021. Seven companies that TechPoint worked with chose to move or expand in Indiana.

TechPoint also played a role in helping IEDC secure some of the 43 tech and tech-enabled firms that in 2021 committed to the IEDC to grow in Indiana with plans to create up to 3,289 new jobs. Those projects account for about 10% of the more than 31,000 tech sector jobs created or retained in Indiana in 2021.

EXECUTIVE COMMITTEE & BOARD OF DIRECTORS



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2021 CICP ENTITIES

CICP AND INITIATIVES



CICP has six key talent and industry sector initiatives — **AgriNovus Indiana**, **Ascend Indiana**, **BioCrossroads**, **Conexus Indiana**, **Energy Systems Network** and **TechPoint** — all addressing challenges and opportunities unique to their respective areas: agbiosciences, talent and workforce development, life sciences, advanced manufacturing and logistics, advanced energy technology and transportation, and technology. While each initiative operates separately, the sum of these efforts represents a comprehensive strategy to pursue some of our most promising opportunities for regional economic development. The approach of each initiative is summarized below. Visit www.cicpindiana.com.



AgriNovus Indiana is focused on advancing the agbiosciences sector by connecting and convening stakeholders to deliver innovative ways to inspire and attract agbiosciences talent, companies and innovation to the state. Visit www.agrinovusindiana.com.



Ascend Indiana is committed to making Indiana a place of economic opportunity for all. Ascend connects job seekers to good and promising career opportunities through an innovative job matching platform, the Ascend Network; catalyzes partnerships and provides consulting services to meet high-demand workforce needs through Ascend Services; and conducts research to enable systems-level change that positively impacts individuals throughout the state. 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, 16 Tech, Indiana Health Information Exchange, and OrthoWorx), expands collaboration and partnerships among Indiana's life science institutions, promotes science education and markets Indiana's life sciences industry. Visit www.biocrossroads.com.



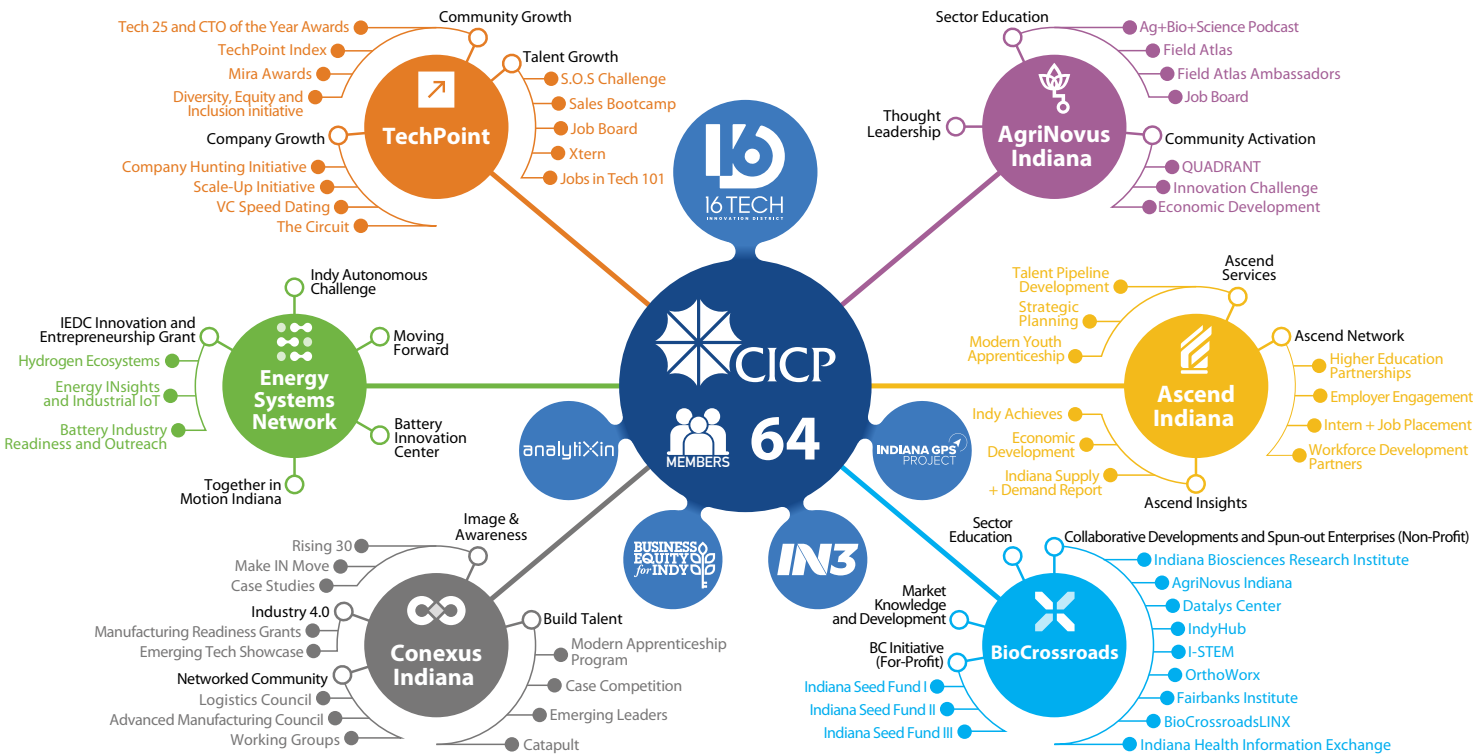
For more than a decade, **Conexus Indiana** has been positioning the Hoosier State as the best place for advanced manufacturing and logistics industries to innovate, invest, employ and succeed. By collaborating with industry, academic and public sector partners on a shared vision for an innovative, skilled 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) is a non-profit initiative focused on the development of the advanced energy technology and transportation sectors. Over the last decade, ESN has collaborated with a range of industry, academia, and government partners to deliver sustainable energy and mobility solutions, including electric car sharing, vehicle-to-smart grid communications, mobility-as-a-service and others. ESN's mission is to leverage its network of global thought leaders to develop integrated energy solutions to increase quality of life for today and tomorrow. The organization's 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.



NOTES

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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

1210 Waterway Blvd.
Suite 5000
Indianapolis, IN 46202

317.638.2440

www.cicpindiana.com