Form **990-PF**
Department of the Treasury
Internal Revenue Service

Return of Private Foundation

or Section 4947(a)(1) Trust Treated as Private Foundation

▶ **Do not enter social security numbers on this form as it may be made public.**
▶ **Go to *www.irs.gov/Form990PF* for instructions and the latest information.**

OMB No. 1545-0047

2022

Open to Public Inspection

For calendar year 2022, or tax year beginning 01-01-2022 , and ending 12-31-2022

Name of foundation
Lumina Foundation for Education Inc

A Employer identification number
35-1813228

Number and street (or P.O. box number if mail is not delivered to street address)
30 S Meridian St Suite 700

Room/suite

B Telephone number (see instructions)
(317) 951-5300

City or town, state or province, country, and ZIP or foreign postal code
Indianapolis, IN 46204

C If exemption application is pending, check here ▶ ☐

G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change

D 1. Foreign organizations, check here..... ▶ ☐
2. Foreign organizations meeting the 85% test, check here and attach computation ... ▶ ☐

H Check type of organization: ☑ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

E If private foundation status was terminated under section 507(b)(1)(A), check here ..... ▶ ☐

I Fair market value of all assets at end of year (from Part II, col. (c), *line 16)* ▶$ 1,413,211,168

J Accounting method: ☐ Cash ☑ Accrual ☐ Other (specify) _____
(Part I, column (d) must be on cash basis.)

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ..... ▶ ☐

Part I **Analysis of Revenue and Expenses** *(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions).)*

		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule)	30,000			
	2 Check ▶☐ if the foundation is **not** required to attach Sch. B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	9,289,518	12,739,559		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	92,087,620			
	b Gross sales price for all assets on line 6a 508,089,000				
	7 Capital gain net income (from Part IV, line 2)		61,938,999		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances 0				
	b Less: Cost of goods sold 0				
	c Gross profit or (loss) (attach schedule)	0			
	11 Other income (attach schedule)	1,683,333	11,120,596	0	
	12 **Total.** Add lines 1 through 11	103,090,471	85,799,154	0	
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc.	3,639,530	250,964		3,359,749
	14 Other employee salaries and wages	6,531,430	413,760		6,017,114
	15 Pension plans, employee benefits	2,160,094	206,064		2,703,725
	16a Legal fees (attach schedule)	674,827	197,512	0	438,994
	b Accounting fees (attach schedule)	193,659	9,648	0	100,461
	c Other professional fees (attach schedule)	4,507,976	2,723,223	0	1,332,963
	17 Interest	557,905			440,060
	18 Taxes (attach schedule) (see instructions)	0	188,537	0	0
	19 Depreciation (attach schedule) and depletion	212,769	451,798	0	
	20 Occupancy	840,737	75,414		756,236
	21 Travel, conferences, and meetings	1,766,554	1,093		1,211,706
	22 Printing and publications	800,249			799,539
	23 Other expenses (attach schedule)	14,030,856	10,370,166	0	13,998,027
	24 **Total operating and administrative expenses.** Add lines 13 through 23	35,916,586	14,888,179	0	31,158,574
	25 Contributions, gifts, grants paid	29,636,321			33,921,229
	26 **Total expenses and disbursements.** Add lines 24 and 25	65,552,907	14,888,179	0	65,079,803
	27 Subtract line 26 from line 12:				
	a **Excess of revenue over expenses and disbursements**	37,537,564			
	b **Net investment income** (if negative, enter -0-)		70,910,975		
	c **Adjusted net income** (if negative, enter -0-)			0	

Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions.)

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash—non-interest-bearing			
	2 Savings and temporary cash investments	25,429,281	22,669,565	22,669,565
	3 Accounts receivable ▶ 403,362			
	Less: allowance for doubtful accounts ▶	385,513	403,362	403,362
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶	0	0	0
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)	0	0	0
	7 Other notes and loans receivable (attach schedule) ▶ 0			
	Less: allowance for doubtful accounts ▶ 0	0	0	0
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges	433,312	343,769	343,769
	10a Investments—U.S. and state government obligations (attach schedule)	28,479,859	9,382,008	9,382,008
	b Investments—corporate stock (attach schedule)	582,616,280	373,651,417	373,651,417
	c Investments—corporate bonds (attach schedule)	43,730,143	44,753,056	44,753,056
	11 Investments—land, buildings, and equipment: basis ▶ 0			
	Less: accumulated depreciation (attach schedule) ▶ 0	0		0
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule)	892,479,693	903,160,141	903,160,141
	14 Land, buildings, and equipment: basis ▶ 7,773,278			
	Less: accumulated depreciation (attach schedule) ▶ 7,441,262	296,401	332,016	332,016
	15 Other assets (describe ▶)	28,730,190	58,515,834	58,515,834
	16 **Total assets** (to be completed by all filers—see the instructions. Also, see page 1, item I)	1,602,580,672	1,413,211,168	1,413,211,168
Liabilities	17 Accounts payable and accrued expenses	15,428,713	39,870,946	
	18 Grants payable	4,082,113	354,700	
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons	0	0	
	21 Mortgages and other notes payable (attach schedule)	0	0	
	22 Other liabilities (describe ▶)			
	23 **Total liabilities**(add lines 17 through 22)	19,510,826	40,225,646	
Net Assets or Fund Balances	**Foundations that follow FASB ASC 958, check here** ▶ ☑ **and complete lines 24, 25, 29 and 30.**			
	24 Net assets without donor restrictions	1,583,069,846	1,372,985,522	
	25 Net assets with donor restrictions			
	Foundations that do not follow FASB ASC 958, check here ▶ ☐ **and complete lines 26 through 30.**			
	26 Capital stock, trust principal, or current funds			
	27 Paid-in or capital surplus, or land, bldg., and equipment fund			
	28 Retained earnings, accumulated income, endowment, or other funds			
	29 **Total net assets or fund balances** (see instructions)	1,583,069,846	1,372,985,522	
	30 **Total liabilities and net assets/fund balances** (see instructions)	1,602,580,672	1,413,211,168	

Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year—Part II, column (a), line 29 (must agree with end-of-year figure reported on prior year's return)	1	1,583,069,846
2	Enter amount from Part I, line 27a	2	37,537,564
3	Other increases not included in line 2 (itemize) ▶	3	257,979,979
4	Add lines 1, 2, and 3	4	1,878,587,389
5	Decreases not included in line 2 (itemize) ▶	5	505,601,867
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29	6	1,372,985,522

Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1 a	TOTAL PUBLICLY TRADED SECURITIES	P		
b	CAPITAL GAINS FROM K-1'S	P		
c				
d				
e				

	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a	508,089,000		448,438,581	59,650,419
b	2,288,580			2,288,580
c				
d				
e				

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

	(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) **or** Losses (from col.(h))
a			0	59,650,419
b			0	2,288,580
c				
d				
e				

2	Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 / If (loss), enter -0- in Part I, line 7 }	2	61,938,999
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c) (see instructions). If (loss), enter -0- in Part I, line 8	3	0

Part V Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see instructions)

1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1. Date of ruling or determination letter: _____ **(attach copy of letter if necessary–see instructions)**	1	985,663
b	All other domestic foundations enter 1.39% (0.0139) of line 27b. Exempt foreign organizations enter 4% (0.04) of Part I, line 12, col. (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	
3	Add lines 1 and 2	3	985,663
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	
5	**Tax based on investment income.** Subtract line 4 from line 3. If zero or less, enter -0-	5	985,663
6	Credits/Payments:		
a	2022 estimated tax payments and 2021 overpayment credited to 2022 — 6a: 1,900,000		
b	Exempt foreign organizations—tax withheld at source — 6b:		
c	Tax paid with application for extension of time to file (Form 8868) — 6c:		
d	Backup withholding erroneously withheld — 6d:		
7	Total credits and payments. Add lines 6a through 6d	7	1,900,000
8	Enter any **penalty** for underpayment of estimated tax. Check here ☑ if Form 2221 is attached.	8	0
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶	9	
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶	10	914,337
11	Enter the amount of line 10 to be: **Credited to 2023 estimated tax** ▶ 914,337 **Refunded** ▶	11	0

Part VI-A Statements Regarding Activities

			Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		No
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition.	1b		No
	*If the answer is "Yes" to **1a** or **1b**, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.*			
c	Did the foundation file **Form 1120-POL** for this year?	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: **(1)** On the foundation. ▶ $ _____ **(2)** On foundation managers. ▶ $ _____			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ $ _____			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? *If "Yes," attach a detailed description of the activities.*	2		No
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? *If "Yes," attach a conformed copy of the changes*	3		No
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a	Yes	
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b	Yes	
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T.*	5		No
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes	
7	Did the foundation have at least $5,000 in assets at any time during the year? *If "Yes," complete Part II, col. (c), and Part XIV.*	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ CA, CO, CT, DC, FL, GA, AL, HI, IL, IN, MD, MA, MN, MS, MO, NM, NY, NC, ND, AZ, SC, TN, VA, AR, WI			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? *If "No," attach explanation* .	8b	Yes	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2022 or the taxable year beginning in 2022? See the instructions for Part XIII. If "Yes," complete Part XIII	9		No
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses.*	10		No

Part VI-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions	11	Yes	
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	

Website address ▶ WWW.LUMINAFOUNDATION.ORG

14 The books are in care of ▶ ERIN ARCHER Telephone no. ▶ (317) 951-5300

Located at ▶ 30 S Meridian St Suite 700 Indianapolis IN ZIP+4 ▶ 46204

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of **Form 1041** —check here ▶ ☐ and enter the amount of tax-exempt interest received or accrued during the year | 15 |

16	At any time during calendar year 2022, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes", enter the name of the foreign	16		No

Part VI-B Statements Regarding Activities for Which Form 4720 May Be Required

	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.		Yes	No
1a	During the year did the foundation (either directly or indirectly):			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	1a(1)		No
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	1a(2)		No
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	1a(3)		No
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	1a(4)	Yes	
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	1a(5)		No
	(6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	1a(6)		No
b	If any answer is "Yes" to 1a(1)–(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions	1b		No
c	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
d	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2022?	1d		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):			
a	At the end of tax year 2022, did the foundation have any undistributed income (Part XII, lines 6d and 6e) for tax year(s) beginning before 2022?	2a		No
	If "Yes," list the years ▶ 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement—see instructions.)	2b		
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here. ▶ 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	3a	Yes	
b	If "Yes," did it have excess business holdings in 2022 as a result of **(1)** any purchase by the foundation or disqualified persons after May 26, 1969; **(2)** the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or **(3)** the lapse of the 10-, 15-, or 20-year first phase holding period? *(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2022.)*	3b		No
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2022?	4b		No

Part VI-B Statements Regarding Activities for Which Form 4720 May Be Required *(continued)*

			Yes	No
5a	During the year did the foundation pay or incur any amount to:			
	(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	5a(1)		No
	(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?	5a(2)		No
	(3) Provide a grant to an individual for travel, study, or other similar purposes?	5a(3)		No
	(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions	5a(4)	Yes	
	(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	5a(5)		No
b	If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions	5b		No
c	Organizations relying on a current notice regarding disaster assistance check ▶ ☐			
d	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?	5d	Yes	
	If "Yes," attach the statement required by Regulations section 53.4945–5(d).			
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	6a		No
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	6b		No
	If "Yes" to 6b, file Form 8870.			
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	7a		No
b	If "Yes", did the foundation receive any proceeds or have any net income attributable to the transaction?	7b		
8	Is the foundation subject to the section 4960 tax on payment(s) of more than $1,000,000 in remuneration or excess parachute payment during the year?	8	Yes	

Part VII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1 List all officers, directors, trustees, foundation managers and their compensation. See instructions

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
Joseph Boateng 30 S Meridian Suite 700 Indianapolis, IN 46204	Director 2.000	34,000	0	0
Matt Breitfelder 30 S Meridian Suite 700 Indianapolis, IN 46204	Director 2.000	34,000	0	0
Justin Christian 30 S Meridian Suite 700 Indianapolis, IN 46204	Director 1.000	28,000	0	0
Kathy Davis 30 S Meridian Suite 700 Indianapolis, IN 46204	Director 2.000	45,000	0	0
Matthew Goldberg 30 S Meridian Suite 700 Indianapolis, IN 46204	Director 1.000	28,000	0	0
Austan Goolsbee 30 S Meridian Suite 700 Indianapolis, IN 46204	Director 1.000	28,000	0	0
Allan Hubbard 30 S Meridian Suite 700 Indianapolis, IN 46204	Director 1.000	28,000	0	0
Alisa Miller 30 S Meridian Suite 700 Indianapolis, IN 46204	Director 2.000	34,000	0	0
Christine Pambianchi 30 S Meridian Suite 700 Indianapolis, IN 46204	Director 1.000	28,000	0	0
William Serrata 30 S Meridian Suite 700 Indianapolis, IN 46204	Director 1.000	21,000	0	0
David Wilson 30 S Meridian Suite 700 Indianapolis, IN 46204	Director 1.000	28,000	0	0
Jamie Merisotis 30 S Meridian Suite 700 Indianapolis, IN 46204	President/CEO 40.000	977,040	103,942	2,520
Holiday McKiernan 30 S Meridian Suite 700 Indianapolis, IN 46204	Exec VP; COO; General Counsel; Secretary 40.000	560,074	148,596	2,899
Brad Kelsheimer	VP for Fin and Invest.; CFO;	437,737	70,989	2,310

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
30 S Meridian Suite 700 Indianapolis, IN 46204	Treasurer 40.000			
Courtney Brown 30 S Meridian Suite 700 Indianapolis, IN 46204	VP of Strategic Impact 40.000	339,625	89,325	2,899
Debra Humphreys 30 S Meridian Suite 700 Indianapolis, IN 46204	VP of Strategic Engagement 40.000	282,634	56,758	2,448
Chauncy Lennon 30 S Meridian Suite 700 Indianapolis, IN 46204	VP for the Future of Learning and Work 40.000	341,186	90,187	0
Timothy Robinson 30 S Meridian Suite 700 Indianapolis, IN 46204	VP of Administration and Partnerships 40.000	231,602	71,840	3,078
Carmen Ambar Twillie 30 S Meridian Suite 700 Indianapolis, IN 46204	Director 1.000	20,154	0	0
Michelle Cooper 30 S Meridian Suite 700 Indianapolis, IN 46204	VP, Public Policy 40.000	91,237	9,209	768
Hong Linh Nguyen 30 S Meridian Suite 700 Indianapolis, IN 46204	VP, Equity Culture, & Talent 40.000	103,786	9,150	630

2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."

(a) Name and address of each employee paid more than $50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
Christa Velasquez 30 S Meridian Suite 700 Indianapolis,IN 46204	Dir Lumina I.V. 40.000	213,422	45,226	100
Shelley Lloyd 30 S Meridian Suite 700 Indianapolis,IN 46204	Dir of HR & Fac 40.000	205,772	105,706	2,368
Kevin Corcoran 30 S Meridian Suite 700 Indianapolis,IN 46204	Strategy Director 40.000	210,156	96,069	2,842
Julie Shewmaker 30 S Meridian Suite 700 Indianapolis,IN 46204	AVP for Fin & acct 40.000	208,224	76,622	2,308
Cody Coppotelli 30 S Meridian Suite 700 Indianapolis,IN 46204	Dir. of Investments 40.000	209,958	75,226	2,428
Total number of other employees paid over $50,000. . . . . ▶				54

Part VII **Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors *(continued)***

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".

(a) Name and address of each person paid more than $50,000	**(b)** Type of service	**(c)** Compensation
CornerStone Partners 675 Jefferson Parkway Charlottesville, V A 22911	Investment consulting and advisory services	2,205,947
HCM Strategists LLC 501 Congress Ave Suite 257 Austin, TX 78701	Support Lumina's state policy agenda	1,849,507
VOX Global PO Box 771733 St Louis, M O 63177	Communication service provider	605,555
Kite Washington LLC 30 S MERIDIAN ST 1100 INDIANAPOLIS, IN 46204	Rental property manager	589,853
Morgan Lewis Bokius LLC 1111 Pennsylvania Ave NW Washington, D C 20004	Legal services provider	375,171

Total number of others receiving over $50,000 for professional services. . . . . ▶

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Part VIII- Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 Philanthropy: The Foundation actively supports the philanthropic sector as well as organizations involved in the field of post-secondary education. Foundation executives and employees are active with philanthropic organizations in Indianapolis, where the Foundation is headquartered, and in the vicinity of the District of Columbia, where it has a satellite office. Foundation executives and staff members also serve on the boards of local, national and international charitable organizations. For example, the Foundation's president and CEO serves on the board of Ditchley Foundation in the United Kingdom, as past chairman and trustee emeritus of the Council on Foundations, and on the boards of ACT and the Central Indiana Corporate Partnership. Other Lumina staff serve on boards such as The Nellie Mae Foundation, Indy Chamber, The Arnolt Center For Investigative Journalism at Indiana University, and the Firefly Children and Family Alliance Foundation.	13,519,090
2 Research and Publications: The Foundation conducts substantial nonpartisan research and analyses on issues affecting post-secondary education and makes this research widely available at no charge. The Foundation released its benchmark report, "A Stronger Nation: Learning beyond high school builds American talent," as an online data visualization tool. This report, based on federal data, offers a compelling case for the need to dramatically increase the share of Americans with workforce certificates, college degrees, and other high-quality post-secondary credentials. The tool, which was widely shared through media pitching and social media outreach, offers state-by-state analyses of the education levels of each state's residents, highlighting the work that must be done to achieve educational attainment of 60 percent. The Foundation released two issues of Focus magazine, a publication which highlights significant issues facing post-secondary education.	4,560,578
3 Conferences and Convenings: The Foundation convenes post-secondary education leaders, policymakers, researchers, and others who are influential and actively involved in efforts to expand access to and success in post-secondary education, particularly among difficult-to-reach populations such as students of color, adults who delay their pursuit of education beyond high school, first-generation students, and students from low-income families. These convenings are focused on bringing together stakeholders around a range of topics with the objectives of learning, building, sharing, and acting. Topics covered range from overcoming barriers to post-secondary education to increasing rates of persistence and completion among students who enroll in college or other post-secondary programs.	2,146,963
4 Technical Assistance: The Foundation provides technical assistance based on nonpartisan research and analyses to stakeholders in the field of post-secondary education, as well as to policymakers who are tasked with developing policy options related to increasing attainment. Foundation executives and staff regularly provide technical advice and assistance about critical issues such as the state of access to education beyond high school, the range of programs that have been initiated to increase such access, and efforts to enhance the likelihood of student success. This includes providing briefings and testimony at the request of policymakers on matters within the Foundation's expertise. The Foundation uses nonpartisan research and analyses to provide background and educational information on a wide array of issues affecting post-secondary education.	1,345,593

Part VIII- Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1 Coastal Enterprises, Inc - PRI Loan to support the expansion of the Child Care Business Lab and development of a business model.	1,000,000
2 Care Academy - Early stage education company focused on credentialing caregiver professionals.	800,000
All other program-related investments. See instructions. **3**	2,029,433
Total. Add lines 1 through 3 . . . . . ▶	3,829,433

Part IX Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:			
a	Average monthly fair market value of securities		1a	1,379,766,394
b	Average of monthly cash balances		1b	19,827,500
c	Fair market value of all other assets (see instructions)		1c	4,120,267
d	**Total** (add lines 1a, b, and c)		1d	1,403,714,161
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e 0		
2	Acquisition indebtedness applicable to line 1 assets		2	
3	Subtract line 2 from line 1d		3	1,403,714,161
4	Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions)		4	21,055,712
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3		5	1,382,658,449
6	**Minimum investment return.** Enter 5% (0.05) of line 5		6	69,132,922

Part X **Distributable Amount** (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ▶ ☐ and do not complete this part.)

1	Minimum investment return from Part IX, line 6		1	69,132,922
2a	Tax on investment income for 2022 from Part V, line 5	2a 985,663		
b	Income tax for 2022. (This does not include the tax from Part V.)	2b		
c	Add lines 2a and 2b		2c	985,663
3	Distributable amount before adjustments. Subtract line 2c from line 1		3	68,147,259
4	Recoveries of amounts treated as qualifying distributions		4	1,697,821
5	Add lines 3 and 4		5	69,845,080
6	Deduction from distributable amount (see instructions)		6	
7	**Distributable amount** as adjusted. Subtract line 6 from line 5. Enter here and on Part XII, line 1		7	69,845,080

Part XI Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:			
a	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26		1a	65,079,803
b	Program-related investments—total from Part VIII-B		1b	3,829,433
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes		2	242,715
3	Amounts set aside for specific charitable projects that satisfy the:			
a	Suitability test (prior IRS approval required)		3a	
b	Cash distribution test (attach the required schedule)		3b	0
4	**Qualifying distributions.** Add lines 1a through 3b. Enter here and on Part XII, line 4		4	69,151,951

Part XII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2021	(c) 2021	(d) 2022
1 Distributable amount for 2022 from Part X, line 7				69,845,080
2 Undistributed income, if any, as of the end of 2022:				
a Enter amount for 2021 only			0	
b Total for prior years: 2020, 2019, 2018		0		
3 Excess distributions carryover, if any, to 2022:				
a From 2017 13,147,668				
b From 2018 21,044,755				
c From 2019 30,158,428				
d From 2020 10,587,827				
e From 2021 10,381,849				
f **Total** of lines 3a through e	85,320,527			
4 Qualifying distributions for 2022 from Part XI, line 4: ▶ $ 69,151,951				
a Applied to 2021, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see instructions)		0		
c Treated as distributions out of corpus (Election required—see instructions)	0			
d Applied to 2022 distributable amount				69,151,951
e Remaining amount distributed out of corpus	0			
5 Excess distributions carryover applied to 2022. *(If an amount appears in column (d), the same amount must be shown in column (a).)*	693,129			693,129
6 **Enter the net total of each column as indicated below:**				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	84,627,398			
b Prior years' undistributed income. Subtract line 4b from line 2b		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b. Taxable amount—see instructions		0		
e Undistributed income for 2021. Subtract line 4a from line 2a. Taxable amount—see instructions			0	
f Undistributed income for 2022. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2023				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)	0			
8 Excess distributions carryover from 2017 not applied on line 5 or line 7 (see instructions)	12,454,539			
9 **Excess distributions carryover to 2023.** Subtract lines 7 and 8 from line 6a	72,172,859			
10 Analysis of line 9:				
a Excess from 2018 21,044,755				
b Excess from 2019 30,158,428				
c Excess from 2020 10,587,827				
d Excess from 2021 10,381,849				
e Excess from 2022 0				

Part XIII Private Operating Foundations (see instructions and Part VI-A, question 9)

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2022, enter the date of the ruling . . . . . ▶

b Check box to indicate whether the organization is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

	Tax year	Prior 3 years			(e) Total
	(a) 2022	(b) 2021	(c) 2020	(d) 2019	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part IX for each year listed					
b 85% (0.85) of line 2a					
c Qualifying distributions from Part XI, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon:					
a "Assets" alternative test—enter:					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part IX, line 6 for each year listed . .					
c "Support" alternative test—enter:					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

Part Supplementary Information (Complete this part only if the foundation had $5,000 or more in assets at any time during the year—see instructions.)

1 Information Regarding Foundation Managers:

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than $5,000). (See section 507(d)(2).)

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.

2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here ▶☐ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. to individuals or organizations under other conditions, complete items 2a, b, c, and d. See instructions

a The name, address, and telephone number or e-mail address of the person to whom applications should be addressed:

Program Office New Inquiry
Lumina Foundation for Education PO
Box 1806
Indianapolis,IN 462061806

b The form in which applications should be submitted and information and materials they should include:

Lumina Foundation does not have a formal letter of inquiry (LOI) policy. However, we do review unsolicited requests. Unsolicited requests are reviewed by the grants management team for alignment with the Foundation's current strategic priorities. If the request aligns with current work, it is referred to a program officer for further review. Requests considered viable are invited to submit concept papers for further consideration by Lumina Executive Team members. Formal invitations for full proposal may be advanced following initial evaluation.

c Any submission deadlines:

UNSOLICITED INQUIRIES RECEIVED BY THE END OF SEPTEMBER FOR THE YEAR 2022

d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:

Lumina carefully reviews every grant inquiry that meets foundation guidelines. Following the initial review, we will inform applicants within two months of receipt whether the inquiry fits our current priorities and resources. Due to limited resources, we cannot request proposals from all inquiries that meet our criteria. If we decide to request a full proposal, a Program Officer will contact the applicant to request additional information and to provide instructions on applying for a grant. An invitation to submit a proposal does not guarantee funding. Lumina carefully considers all solicited proposals; occasionally, we invite external experts to review proposals as well. We are diligent in our efforts to respond promptly to proposals. Assuming potential grantees' timely responses to requests for information, the entire review and approval process typically takes approximately six months.

Part XIV Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
Blackbaud Giving Fund 2000 Daniel Island Dr Suite 100 Charleston, SC 29492		PC	Public charity conduit for Lumina staff, Board and retiree gifts to public charities.	2,440,323
State Center Community College District 1171 Fulton Street Fresno, CA 93721		PC	To support marketing and brand-building efforts at college and ultimately increase enrollment of adult learners. (Madera Community College)	1,000,000
American Council on Education One Dupont Circle NW Washington, DC 200361193		PC	To develop a new classification scheme for higher education and related efforts	900,000
American Journalism Project Inc 6218 Georgia Avenue NW Suite 1-59 Washington, DC 200115125		PC	To support the Indiana Journalism Project.	750,000
Illinois Community College Board 401 East Capitol Avenue Springfield, IL 627011711		PC	To create or expand skills gap training for students of color in at-risk communities through support services, credential completion, and workforce training.	745,200
Education Strategy Group 4716 Drummond Avenue Chevy Chase, MD 20815		NC	To support the extension of the REACH Collaborative.	700,000
Washington Monthly Corporation 1200 18th Street NW Suite 330 Washington, DC 20036		PC	To support independent, policy-oriented journalism about issues vital to creating a better-educated country.	650,000
WGBH Educational Foundation One Guest Street Boston, MA 02135		PC	To support in-depth reporting and a new podcast on higher education.	650,000
Coastal Enterprises Inc 30 Federal Street Brunswick, ME 04011		PC	To support the expansion of the Child Care Business Lab and development of a business model for peers nationwide	600,000
University of Hawaii Foundation 1314 South King Street Suite B Honolulu, HI 96814		PC	To support Hawaii's efforts to increase Native Hawaiian, Pacific Islander and Filipino attainment through the Talent, Innovation, and Equity initiative and Lumina's equity policy audit state cohort with the Education Trust.	575,000
Ditchley Foundation The Ditchley Park Enstone Chipping Norton UK		PC	To support The Ditchley Method's social network analysis framework for use in Human Network Design's influencer engagement strategy across various Ditchley and HND convenings.	505,000
Capital B News Inc 209 W 29th Street New York, NY 10001		PC	To support Capital B News' coverage of Gary, Ind.	500,000
CCF Community Initiatives Fund 221 S Figueroa Street NO 400 Los Angeles, CA 90012		PC	To support journalism that relates the achievement of quality short-term credentials to fair and just labor market outcomes.	500,000
Corporation for a Skilled Workforce PO Box 17 Hartland, MI 48353		PC	To lead a community of practice focused on equity to the US Department of Labor's Strengthening Community Colleges cohort members.	500,000
Office of Community College Research and Leadership Univeristy of Illinois 51 Gerty Drive Champaign, IL 61820		PC	To support a network of states implementing credential as you go models with equity conscious practices for adults of color.	500,000
Research Foundation of CUNY 230 West 41st Street 7th Floor New York, NY 10036		PC	To support CUNY's Second Year Success Campaign and CUNY's Lecturer Hiring Initiative	500,000
Education Strategy Group 4716 Drummond Avenue Chevy Chase, MD 20815		NC	To lead the coordination and technical advisory capacity of the state Credential As You Go network	401,500
Excelencia in Education Inc 1156 15th Street NW Suite 1001 Washington, DC 20005		PC	To support policy and engagement strategies that accelerate credential attainment for Latino students.	400,000
Southern Poverty Law Center 400 Washington Avenue Montgomery, AL 36104		PC	To support the Southern Poverty Law Center.	400,000
Trustees of Indiana University The P O Box 1847 Bloomington, IN 474021847		PC	To support Phase 2 of the I.U. Network Science Institute's plan to develop network mapping and visualization tools to advance Lumina's Human Network Design strategy.	400,000
Alabama Possible PO Box 55058 Birmingham, AL 35255		PC	To support the development of regional attainment networks throughout Alabama in support of the state's credentialing and workforce goals	400,000
Border Network for Human Rights 2115 North Piedras Street El Paso, TX 79930		PC	To support the efforts of the Border Network for Human Rights.	400,000
Jobs for the Future Inc 50 Milk Street Floor 17 Boston, MA 02109		PC	To provide technical assistance to the Illinois Community College Board for the design and implementation of employer engagement strategies intended to accelerate outcomes for Black learners.	400,000
Joint Center for Political and Economic Studies Inc 1090 Vermont Avenue NorthwestSuite Washington, DC 200054928		PC	To produce research and inform a policy agenda for Black America around the future of work and learning.	400,000
Regents of the University of California - Los Angeles 10920 Wilshire Blvd Suite 500 Los Angeles, CA 90024		PC	To support the Critical Race Studies Program at the University of California, Los Angeles School of Law	400,000
Regents of the University of California 9500 Gilman DriveMC 0927 La Jolla, CA 920930927		PC	To support the Indigenous Futures Institute at the University of California, San Diego.	400,000
University of Central Florida Foundation 12424 Research Parkway Suite 250 Orlando, FL 328263257		PC	To increase baccalaureate degrees and shorten time to complete those degrees among the Florida College System transfer population	400,000
Association of Community College Trustees 1101 17th Street Northwest Suite 3 Washington, DC 20036		PC	To support a partnership between Maryland community colleges and other stakeholders to support skills-based hiring pathways into public and private sector jobs.	350,000
Lawyers for Good Government Inc 10685-B Hazelhurst Drive Suite 196 Houston, TX 77043		PC	To support Lawyers for Good Government.	350,000
Research Foundation of CUNY 230 West 41st Street 7th Floor New York, NY 10036		PC	To support the John Jay College Institute for Justice and Opportunity.	350,000
Campaign for College Opportunity 1149 South Hill Street Suite 925 Los Angeles, CA 90015		PC	To support the Campaign for College Opportunity's efforts to inform the public about state-level policies that increase postsecondary attainment and improve outcomes for Black, Hispanic, Latino, Native American, and adult learners.	325,000
National Council for Workforce Education 122 Calistoga Road 257 Santa Rosa, CA 95409		PC	To convene national workforce and community college leaders to better understand and adapt to the green economy while also preparing students for quality jobs within it.	300,000
Public Radio Exchange 15 South 5th St Minneapolis, MN 55402		PC	To support coverage of immigrants seeking education and training after high school.	300,000
Smithsonian (Museum of the American Latino) 1000 Jefferson Drive SW Washington, DC 20560		PC	To evaluate Smithsonian Institution-Museum of the American Latino's guided pathways program in museum studies focused on creating a network that advances equity and culture across the country through Hispanic-serving institutions.	275,000
George Washington Institute of Public Policy 805 21st Street NorthwestSuite 625 Washington, DC 20052		PC	To expand, improve and manage the Non-degree Credentials Research Network(NCRN).	257,000
National Student Clearinghouse Research Center 2300 Dulles Station Boulevard Suit Herndon, VA 20171		PC	To better understand the re-enrollment, perseverance and credentials earned by students with some college, but no credential.	254,700
Greater Indianapolis Chamber of Commerce 111 Monument Circle Suite 1950 Indianapolis, IN 46204		PC	To support the Indy Chamber's Accelerate Indy regional strategy for economic growth in Central Indiana.	250,000
Greater Indianapolis Chamber of Commerce 111 Monument Circle Suite 1950 Indianapolis, IN 46204		PC	To support the Business Equity for Indy initiative.	250,000
State Higher Education Executive Officers 3035 Center Green Drive Suite 100 Boulder, CO 80301		PC	To create a new model of state authorization and oversight, and prepare states for FAFSA simplification.	250,000
Equity Research Cooperative 3051 North 35th Street Philadelphia, PA 19132		PC	To support design and pilot an anti-racist and equity-first intervention project	250,000
Markup News Inc PO Box 1103 New York, NY 10159		PC	To support independent news coverage of the potential for technology to produce unjust outcomes among students of color.	250,000
RAND Corporation 1776 Main StreetPO Box 2138 Santa Monica, CA 904072138		PC	To conduct a research study on how education and training impact hiring, retention, and earnings for learners of color.	250,000
State Higher Education Executive Officers 3035 Center Green Drive Suite 100 Boulder, CO 80301		PC	To support new and ongoing bodies of work, convenings, technical assistance, quality assurance, and state attainment goal setting.	230,000
Regents of the University of California - Irvine Office of Research Irvine, CA 926977600		PC	To explore noncredit course and program-taking, completion and labor market outcomes in the Virginia Community College System.	230,000
American Institutes for Research 1400 Crystal Drive 10th Floor Arlington, VA 22202		PC	To research adult-friendly educational and training models that support participation among adults of color	222,800
Center for Public Integrity The 910 17th Street NW Suite 1030 Washington, DC 20006		PC	To support investigative journalism on efforts to undermine academic freedom.	210,000
American Council on Education One Dupont Circle NW Washington, DC 200361193		PC	To support ACE's early efforts to reinvent the Carnegie Classification system and to empower postsecondary leaders to navigate polarization and 'divisive concepts'	200,100
Aspen Institute The 2300 N Street NW Suite 700 Washington, DC 20037		PC	To support the Aspen Institute's efforts to improve community college student post-graduation success.	200,000
Research Foundation of State University of New York PO Box 9 Albany, NY 122010009		PC	To support community colleges in the State University of New York system participation in Innovative Credentials to Associates Network to increase adult learner of color completion.	200,000
Advance Illinois 303 East Wacker Drive Suite 1925 Chicago, IL 60601		PC	To support Advance Illinois' efforts to educate the public about state-level policies that increase postsecondary attainment and improve outcomes for Black, Hispanic, Latino, Native American, and adult learners.	200,000
American Academy of Arts and Sciences 136 Irving St Cambridge, MA 02138		PC	To further integrate the Aspen Forum for the Future of Higher Education with the Academy, incorporating journalists' participation.	200,000
Center for Racial Equity in Education 300 Camp Road Suite B14 Charlotte, NC 28206		PC	To support the Center for Racial Equity in Education's (CREED) efforts to inform the public about state-level action and policies that increase postsecondary attainment and improve outcomes for Black, Hispanic, Latino, Native American, and adult learners.	200,000
Community College Research Center Box 174 525 W 120th Street New York, NY 10027		NC	Identify state funding strategies that support student success for working adult learners of color.	200,000
Denver Education Attainment Network 789 Sherman Street Suite 250 Denver, CO 80203		PC	To support the Denver Education Attainment Network's (DEAN) efforts to inform the public about state-level action and policies that increase postsecondary attainment and improve outcomes for Black, Hispanic, Latino, Native American, and adult learners.	200,000
Education Commission of the States 700 Broadway Suite 810 Denver, CO 80203		PC	To improve credential transparency and workforce alignment	200,000
Organisation for Economic Cooperation & Development (OECD) 2001 L Street NW Washington, DC 20036		GOV	Provide a comprehensive cross-country examination of existing quality assurance governance models in adult education and training, while elaborating in-depth on a number of selected topics that are currently of high salience in the field	200,000
Partnership for College Completion 200 S Michigan Avenue Suite 1410 Chicago, IL 60604		PC	To support the Partnership for College Completion's efforts to educate the public about state-level policies that increase postsecondary attainment and improve outcomes for Black, Hispanic, Latino, Native American, and adult learners.	200,000
Student Clinic for Immigrant Justice Inc 217 Hanover Street Suite 320 Boston, MA 021139998		PC	To support the efforts of Student Clinic for Immigrant Justice (SCIJ).	200,000
Urban Institute The 500 LEnfant Plaza SW Washington, DC 20024		PC	To support Corporation for a Skilled Workforce in implementation of a new community of practice focused on implementing equity-centered approaches in industry-community college partnerships.	200,000
World Education Inc 44 Farnsworth Street Boston, MA 02210		PC	to foster more on-ramps for adult learners with barriers to access in REACH states through Ability to Benefit	200,000
Franklin College of Indiana 101 Branigin Boulevard Franklin, IN 46131		PC	To support the expansion of TheStatehouseFile.com's public policy reporting in Indiana.	180,000
Colorado Community College System Foundation The 9101 E Lowry Boulevard Denver, CO 80230		PC	To support Colorado community colleges participation in Innovative Credentials to Associates Network to increase adult learner of color completion.	175,000
Aspen Institute The 2300 N Street NW Suite 700 Washington, DC 20037		PC	To pilot new policies, practices and programs that support the success of students of color who are also parents at MSIs.	150,000
Association of Public and Land-grant Universities 1307 New York Avenue Northwest Su Washington, DC 200054722		PC	To support development of navigation/recruitment strategies and comprehensive student success pathways for adults of color pursuing BA degrees.	150,000
National Association for College Admission Counseling 1050 North Highland Street Suite 4 Arlington, VA 22201		PC	To operationalize a new framework for promoting greater racial equity in enrollment and financial aid systems	150,000
Steve Fund The PO Box 9070 Providence, RI 02940		PC	To support The Steve Fund's programmatic expansion to HBCUs and MSIs.	150,000
Hechinger Institute on Education and the Media 475 Riverside Drive Suite 650 New York, NY 10115		PC	To build operations and engagement capacity for a national nonprofit newsroom covering higher learning.	150,000
Ithaka SR One Liberty Plaza New York, NY 10006		PC	To evaluate the Northeast Ohio Compact on debt forgiveness	150,000
Northern Essex Community College Foundation Inc 100 Elliott Street Haverhill, MA 01830		PC	To support the operational costs associated with the Massachusetts Community College Living Expenses Pilot Study.	150,000
UnidosUS 1126 16th St NW Washington, DC 20036		PC	To develop and launch a communications campaign centered on today's Latino/Hispanic students	150,000
University of Texas System The 210 W 7th Street Austin, TX 78701		PC	To redesign student pathways to ensure equity.	150,000
Upwardly Global 505 8th Avenue Suite 1100 New York, NY 10018		PC	To support immigrant and refugee students into educational and career opportunities.	150,000
Foundation for California Community Colleges 1102 Q Street Suite 4800 Sacramento, CA 95811		PC	To support California Community College System participation in Innovative Credentials to Associates Network to increase adult learner of color completion.	148,500
University of Utah The 201 South Presidents Circle Salt Lake City, UT 841128952		PC	To build a database of postsecondary education in prison programs and to evaluate Second Chance Pell sites.	135,000
Aspen Institute The 2300 N Street NW Suite 700 Washington, DC 20037		PC	To plan for options on how to mobilize the higher education community to advance climate solutions	131,000
National Association of System Heads 3300 Metzerott Road Adelphi, MD 20783		PC	To implement the comprehensive Equity Action Framework with six state systems.	130,000
Institute for Higher Education Policy 1825 K Street Northwest Suite 720 Washington, DC 20006		PC	To share broadly the stories of returning adult students who overcame barriers to finish college.	125,000
Second Nature Inc 160 Alewife Brook Parkway 1182 Cambridge, MA 02138		PC	To produce a toolkit to center climate justice in postsecondary climate action plans	125,000
Asante Art Institute of Indianapolis Inc 10 South New Jersey Suite 210 Indianapolis, IN 46204		PC	To support the efforts of Asante Art Institute of Indianapolis, INC.	124,100
Minnesota Education Equity Partnership 2233 University Ave W Suite 220 St Paul, MN 55114		PC	To support MNEEP's efforts to inform the public about state-level policies that increase postsecondary attainment and improve outcomes for Black, Hispanic, Latino, Native American, and adult learners.	121,400
New England Commission of Higher Education 301 Edgewater Place Suite 210 Wakefield, MA 01880		PC	To support NECHE taskforce prototyping an addendum to current accreditation standards and evaluation process for quality assurance of non-credit programs and credentials.	110,000
Emerging Practitioners in Philanthropy PO Box 889385 Los Angeles, CA 900889385		PC	To provide operational support and advance racial equity efforts in the philanthropic sector.	100,000
Johns Hopkins University 3400 N Charles Street Baltimore, MD 21218		PC	To produce a new framework for understanding how collective settings influence people's ability to come together across lines of difference.	100,000
Minnesota State Colleges and Universities 30 East 7th Street Suite 350 St Paul, MN 55101		PC	To support marketing and brand-building efforts at college and ultimately increase enrollment of adult learners. (Minnesota State College Southeast)	100,000
Mitch Daniels Leadership Foundation 880 Monon Green Blvd Suite 101 Carmel, IN 46032		PC	To support the Mitch Daniels Leadership Foundation fellowship program.	100,000
American Civil Liberties Union of Indiana Foundation Inc 1031 East Washington Street Indianapolis, IN 46202		PC	To support the American Civil Liberties Union of Indiana.	100,000
Century Foundation Inc The One Whitehall Street 15th Floor New York, NY 10004		PC	To understand messages that resonate with key audiences related to higher education cost and price.	100,000
College of Eastern Idaho 1600 South 25th East Idaho Falls, ID 83404		PC	To support marketing and brand-building efforts at college and ultimately increase enrollment of adult learners.	100,000
Colorado Department of Higher Education 1600 Broadway Suite 2200 Denver, CO 80202		NC	To support Colorado's participation in Lumina's equity policy audit state cohort with Education Trust.	100,000
Community College of Rhode Island Foundation 1762 Louisquisset Pike Lincoln, RI 02865		PC	To support marketing and brand-building efforts at college and ultimately increase enrollment of adult learners.	100,000
County College of Morris Foundation 214 Center Grove Road Randolph, NJ 07869		PC	To support marketing and brand-building efforts at college and ultimately increase enrollment of adult learners.	100,000
Education Reform Now Inc 276 5th Avenue New York, NY 10001		PC	To support Education Reform Now's efforts to educate the public about state-level policies that increase postsecondary attainment and improve outcomes for Black, Hispanic, Latino, Native American, and adult learners.	100,000
Great Falls College - Montana State University 2100 16th Avenue South Great Falls, MT 59405		PC	To support marketing and brand-building efforts at college and ultimately increase enrollment of adult learners.	100,000
Houston Community College System Foundation 3100 MainSuite 12B12 MC1148 Houston, TX 77002		PC	To support marketing and brand-building efforts at college and ultimately increase enrollment of adult learners.	100,000
Indiana University Health Foundation Inc 1633 North Capitol Avenue Indianapolis, IN 46202		PC	To support I.U.Health's Mosaic Center for Work, Life and Learning.	100,000
Indianapolis Foundation Inc 615 North Alabama Street Suite 119 Indianapolis, IN 46204		PC	To support The Indianapolis Foundation's racial equity community leadership initiatives.	100,000
Jesuit Conference Inc 1726 New Hampshire Ave NW Washington, DC 20009		PC	To provide a capacity building grant to the Descendants Truth and Reconciliation Trust and Foundation.	100,000
Long Beach Community College District 4901 E Carson Street Long Beach, CA 90808		PC	To support marketing and brand-building efforts at college and ultimately increase enrollment of adult learners.	100,000
Louisiana Board of Regents PO Box 3677 Baton Rouge, LA 70821		GOV	To support Louisiana's participation in Lumina's equity policy audit state cohort with Education Trust.	100,000
Madison Area Technical College 1701 Wright Street Madison, WI 53704		PC	To support marketing and brand-building efforts at college and ultimately increase enrollment of adult learners.	100,000
Northern Arizona University PO Box 4092 Flagstaff, AZ 86011		PC	To support a program that targets stop-out students with more than 60 completed credits to graduate with a Bachelor's Degree in 18 months or less.	100,000
Northwest-Shoals Community College 800 George Wallace Blvd Muscle Shoals, AL 35661		PC	To support marketing and brand-building efforts at college and ultimately increase enrollment of adult learners.	100,000
Partners for College Affordability and Public Trust 1629 K Street NW Suite 300 Washington, DC 20006		PC	To support Partners for College Affordability and Public Trust's (PCAPT) efforts to educate the public about state-level policies that increase postsecondary attainment and improve outcomes for Black, Hispanic, Latino, Native American, and adult learners.	100,000
Philanthropic Ventures Foundation 1222 Preservation Park Way Okland, CA 94612		PC	To provide operational support in the expansion of Resilia's racial equity and DEI practices in the philanthropic sector.	100,000
Quality Education for Minorities Network 1818 N St NW Suite 350 Washington, DC 20036		PC	To develop a framework for Indigenous student success	100,000
Southern New Hampshire University 2500 North River Road Manchester, NH 03106		PC	To support Future Without Fear's Atlanta event in fall 2022	100,000
Virginia Community College System 300 Arboretum Place Suite 200 Richmond, VA 23236		PC	To support Virginia Community College System participation in Innovative Credentials to Associates Network to increase adult learner of color completion.	100,000
Trustees of Tufts College Research Administration Boston, MA 02111		PC	To support a convenings series hosted by the Institute for Democracy & Higher Education (IDHE) on the new Democracy Re/Designed framework	80,000
Trustees of Indiana University The P O Box 1847 Bloomington, IN 474021847		PC	To support the I.U. Network Science Institute's plan to develop network mapping and visualization tools to advance Lumina's Human Network Design strategy.	75,000
Council on Postsecondary Education 101 Airport Road Frankfort, KY 40601		GOV	To support Kentucky's participation in Lumina's equity policy audit state cohort with Education Trust.	75,000
Elizabeth City State University 1704 Weeksville Rd Elizabeth City, NC 27909		NC	To build HBCU institutional capacity to serve Black adult learners.	75,000
Fayetteville State University 1200 Murchison Road Fayetteville, NC 28301		PC	To build HBCU institutional capacity to serve Black adult learners.	75,000
Johnson C Smith University 100 Beatties Ford Road Charlotte, NC 28216		PC	To build HBCU institutional capacity to serve Black adult learners.	75,000
Shaw University 118 East South Street Raleigh, NC 27601		PC	To build HBCU institutional capacity to serve Black adult learners.	75,000
Winston-Salem State University 601 South Martin Luther King Jr Dr WinstonSalem, NC 27110		PC	To build HBCU institutional capacity to serve Black adult learners.	75,000
PEN America 588 Broadway Suite 303 New York, NY 10012		PC	To support a series of events to inform the national narrative about 'divisive concepts' in higher education	70,000
Amalgamated Charitable Foundation Inc 1825 K Street NW Washington, DC 20006		PC	Funders group and subject matter experts working together and hosting convenings on the Job Quality Measurement Initiative.	60,000
Congregation of Holy Cross US Province PO Box 765 Notre Dame, IN 46556		PC	To provide for the care of elderly priests and religious.	60,000
Media Impact Funders Inc 200 W Washington Square Philadelphia, PA 19106		PC	To support the Journalism Funders Gathering and Media Impact Forum in 2023 and 2024.	60,000
Campus Compact 89 South Street Suite 103 Boston, MA 02111		PC	To support the 2022 Newman Civic Fellows convening in Boston	50,000
Complete College America 350 Massachusetts Ave Suite 300 Indianapolis, IN 46204		PC	To support invitational meeting, Democracy, Civic Learning and Student Success: Evidence, Equity, Collective Impacts	50,000
Council on Foundations 1255 23rd Street NW Suite 200 Washington, DC 20037		PC	To support the 2022 COF Public Policy Summit.	50,000
Indiana Black Expo 601 N Shortridge Rd Indianapolis, IN 46219		PC	To support the 2022 IBE Education Conference.	50,000
American Association of Colleges and Universities 1818 R Street Northwest Washington, DC 20009		PC	To advance evidence on the efficacy of civic and community-based engagement in higher education at a state level in Utah	50,000
Civic Nation 727 15th Street NW Washington, DC 20005		PC	To support strategic communications efforts around the student debt cancellation application.	50,000
Clackamas Community College 19600 Molalla Avenue Oregon City, OR 970457998		PC	To support website redesign efforts in support of adult student participation.	50,000
Fond du Lac Tribal and Community College 2101 14th Street Cloquet, MN 55720		PC	To support website redesign efforts in support of adult student participation.	50,000
Indian Hills Community College 525 Grandview Ave Ottumwa, IA 52501		PC	To support website redesign efforts in support of adult student participation.	50,000
Linn-Benton Community College Foundation 6500 Pacific Blvd SW Albany, OR 97321		PC	To support website redesign efforts in support of adult student participation.	50,000
Mississippi Institutions of Higher Learning 3825 Ridgewood Road Suite 930 Jackson, MS 39211		NC	Complete2Compete (Jackson, MS), 1st place winner of Lumina Foundation's Beautiful Minds competition, in partnership with Freethink.	50,000
Monroe Community College Foundation 1000 East Henrietta Road Rochester, NY 14623		PC	To support website redesign efforts in support of adult student participation.	50,000
New America Foundation 740 15th Street Northwest Suite 90 Washington, DC 20005		PC	A convening hosted by New America to highlight the initial outcomes of their work with the U.S. Departments of Commerce and Treasury on measuring social and economic progress differently.	50,000
Northwestern Michigan College Foundation 1701 E Front Street Traverse City, MI 49686		PC	To support website redesign efforts in support of adult student participation.	50,000
Oconee Fall Line Technical College 1189 Deepstep Rd Sandersville, GA 31082		PC	To support website redesign efforts in support of adult student participation.	50,000
Riverside Community College District Foundation PO Box 907 Riverside, CA 92502		PC	To support website redesign efforts in support of adult student participation.	50,000
STAR Scholars Network PO Box 374 Perry Hall, MD 21128		PC	Publication and dissemination of global study on access and success initiatives	50,000
Western Nevada College Foundation 2201 West College Parkway Carson City, NV 89703		PC	To support website redesign efforts in support of adult student participation.	50,000
American Association of Collegiate Registrars and Admissions Officers 1108 16th Street NW Suite 400 Washington, DC 20036		PC	To support a kickoff convening for new WICHE/AACRAO project to develop tools and guidelines for improving administrative hold policies and practices.	47,500
University of Michigan The - School of Education 610 East University 1360F SEB Ann Arbor, MI 481091259		PC	To complete research on non-credit data for five state systems.	47,000
North Carolina Community Colleges System Office 200 W Jones Street Raleigh, NC 27603		PC	To expand the number of institutions involved in the REACH Collaborative in North Carolina	40,000
Campaign for College Opportunity 1149 South Hill Street Suite 925 Los Angeles, CA 90015		PC	To support the Campaign for College Opportunity's Advancing Equity in Higher Education Post Affirmative Action convening.	35,000
American Council on Education One Dupont Circle NW Washington, DC 200361193		PC	To convene nonprofit mental health stakeholders to discuss and strategize on higher education role in addressing the mental health crisis.	30,000
19th News 3267 Bee Caves Road Austin, TX 78746		PC	To support a hybrid event focused on the history and implications of Title IX in American higher education.	30,000
Organisation for Economic Cooperation and Development 2001 L Street NW Washington, DC 20036		GOV	To support the OECD Forum Engagement Group	26,042
Education Writers Association 1825 K Street NW Suite 200 Washington, DC 20006		PC	To support a special reception at the EWA National Seminar in Orlando.	25,000
Indiana Philanthropy Alliance 1100 Symphony Centre32 East Washing Indianapolis, IN 462043583		PC	To support the IPA's Philanthropy Leads Diversity Series,	25,000
Michigan College Access Network 200 N Washington Sq Ste 210 Lansing, MI 48933		PC	To support technical assistance aligned to Lumina's State Policy Agenda.	25,000
State Higher Education Executive Officers 3035 Center Green Drive Suite 100 Boulder, CO 80301		PC	To support the 2022 SHEEO Higher Education Policy Conference in Indianapolis, IN	25,000
State Higher Education Executive Officers 3035 Center Green Drive Suite 100 Boulder, CO 80301		PC	State Higher Education Executive Officers organization annual membership conference.	25,000
State Higher Education Executive Officers 3035 Center Green Drive Suite 100 Boulder, CO 80301		PC	To support the 68th Annual meeting of SHEEO in Portland, Oregon	25,000
Trustees of Indiana University The P O Box 1847 Bloomington, IN 474021847		PC	To support the Higher Education Philanthropy: A Course for the Future workshop.	25,000
US Chamber of Commerce Foundation 1615 H Street Northwest Washington, DC 200622000		PC	This is an in-person convening to support participation of community colleges and partners from Illinois, Florida, and Arkansas in the second Talent Pipeline Management Academy under GR21-2105-1114391.	25,000
YMCA of Greater Indianapolis 615 North Alabama StreetSuite 200 Indianapolis, IN 46204		PC	To support the 2023 Monster Meeting Series.	25,000
Arkansas Division of Higher Education 101 E Capitol Avenue Suite 300 Little Rock, AR 72201		PC	This T/A award will support the Arkansas Department of Higher Education to review the role and scope for colleges and universities in the state. It will support NCHEMS to conduct a significant portion of the work while also seeking resources from the state.	25,000
Colorado Education Initiative 600 17th Street Suite 1400N Denver, CO 80264		PC	To support technical assistance aligned to Lumina's State Policy Agenda.	25,000
Education Trust Inc The 1501 K Street NW Suite 200 Washington, DC 20005		PC	To support state Technical Assistance aligned to Lumina's State Policy Agenda.	25,000
Indiana Canine Assistance Network Inc 5100 Charles Ct Suite 100 Zionsville, IN 46077		PC	To support the Name a Puppy training initiative.	25,000
Madam Walker Legacy Center 617 Indiana Avenue Suite 320 Indianapolis, IN 462023173		PC	To support the Madam Walker Legacy Center 95th Anniversary, Official Grand Reopening.	25,000
Massachusetts Association of Community Colleges - Bunker Hill Community Col 15 Court Square Suite 960 Boston, MA 02108		GOV	To support technical assistance aligned to Lumina's State Policy Agenda.	25,000
Milk Bank Inc The 5060 E 62nd Street Suite 128 Indianapolis, IN 46220		PC	To provide general program support.	25,000
Myfuturenc Inc 301 N WILMINGTON ST Raleigh, NC 27601		PC	To support state Technical Assistance aligned to Lumina's State Policy Agenda.	25,000
National Association of Black Journalists 8701-A Adelphi Road Hyattsville, MD 207837101		PC	To support Lumina's NABJ panel session on the enrollment crisis and mental health.	25,000
National Center for Civic Innovation Inc 121 Avenue of the Americas 6th Flo New York, NY 10013		PC	To support the Presidents Alliance initiatives to expand higher education access and career equity for undocumented students.	25,000
National Council on Black American Affairs Inc 2155 University Avenue Bronx, NY 10453		PC	To support the Fall 2022 Men of Color Student Leadership Institute.	25,000
Ronald Reagan Presidential Foundation and Institute 40 Presidential Drive Simi Valley, CA 93065		PC	To support the RISE Summit 2022.	25,000
Six Sigma Racial Equity Institute Inc 9783 E 116th St 167 Fishers, IN 46037		PC	To support the Six Sigma Racial Equity Institute.	25,000
Southern California College Access Network 1000 North Alameda StreetSuite 240 Los Angeles, CA 90012		PC	Changemakers State Capitol Convening: Conversations between Changemakers and state leaders in Sacramento will focus on solutions that deconstruct systemic barriers to achieve racial equity in higher education. CA Student Leadership Analysis: This research proposal aligns with the Lumina Foundation's overall state policy goal to help states achieve racial justice and equity by eliminating systemic, structural barriers.	25,000
United Northeast Community Development Corporation 3908 Meadows Drive Suite 208 Indianapolis, IN 46205		PC	To support The Hard Truth Series.	25,000
Urban Manufacturing Alliance 608 Henry St Brooklyn, NY 11231		PC	To support Urban Manufacturing Alliance's 2022 Houston Gathering of manufacturing communities.	25,000
Young Invincibles 1025 Connecticut Avenue NW Suite Washington, DC 200365405		PC	To support strategic communications efforts around the student debt cancellation application.	24,000
Investigative Reporters and Editors 138 Neff Annex Columbia, MO 65211		PC	To support higher education training at national conferences for investigative and data journalists in 2023 and 2024.	20,000
Hispanos Organized for Political EqualityCalifornia 634 South Spring Street Suite 920 Los Angeles, CA 90014		PC	To support HOPE's Education Workshops & Trainings	20,000
Metropolitan Indianapolis Public Broadcasting 1630 North Meridian Street Suite 2 Indianapolis, IN 462021437		PC	To support WFYI broadcasting events for 2023.	20,000
New America Foundation 740 15th Street Northwest Suite 90 Washington, DC 20005		PC	Follow up meeting to the Biden Administration Convening on Advancing Equity and Wellbeing through Data	20,000
Northwood Christian Church 4550 Central Avenue Indianapolis, IN 46205		PC	To provide general support.	20,000
Rockefeller Philanthropy Advisors Inc 90 Church Street New York, NY 10008		PC	To support the MyPromise 2022 Symposium event and mission	20,000
Gleaners Food Bank of Indiana Inc 3737 Waldemer Avenue Indianapolis, IN 46241		PC	To provide support to the Gleaners School-Based Pantry program.	16,000
Gleaners Food Bank of Indiana Inc 3737 Waldemer Avenue Indianapolis, IN 46241		PC	To provide general support for the School-Based Pantry.	16,000
Aspen Institute The 2300 N Street NW Suite 700 Washington, DC 20037		PC	To support the White House Tribal Youth Summit.	15,000
Association of Community College Trustees 1101 17th Street Northwest Suite 3 Washington, DC 20036		PC	To support the 2022 ACCT SNAP Employment and Training Convening.	15,000
Indiana Latino Expo Inc 1113 E 86th St 111 Indianapolis, IN 46240		PC	To support ILE's programming including the Indiana Latino Expo, Awards Gala, and Mayor's Breakfast.	15,000
Jobs for America's Graduates Inc 1600 Duke Street Suite 210 Alexandria, VA 223142720		PC	To support the Jobs for America's Graduates (JAG) National Student Leadership Academy (NSLA).	15,000
Al Da Foundation 1835 Market Street Suite 450 Philadelphia, PA 19103		PC	To support a reception celebrating multicultural and bilingual journalism.	15,000
Arizona Latino Leaders in Education 515 E Grant Street Suite 150 Phoenix, AZ 85004		PC	This project will specifically engage parents, caregivers, educators, business and employer groups, local and state policymakers, and community leaders to connect the dots between student achievement, post-secondary attainment and the social determinants of education.	15,000
Eastern Kentucky Concentrated Employment Program Inc 100 Airport Gardens Road Hazard, KY 41701		PC	EKCEP (Hazard, KY), 2nd place winner of Lumina Foundation's Beautiful Minds competition, in partnership with Freethink.	15,000
George Floyd Memorial Foundation Inc 122 South Calhoun Tallahassee, FL 32301		PC	To support the 2022 George Floyd Memorial Foundation Volunteerism Week.	15,000
Indiana Latino Institute Inc 2126 N Meridian Street Suite 100 Indianapolis, IN 46202		PC	To support the 2022 Indiana Latino Education Summit.	15,000
InnoPower Indy Inc 5868 E 71st Suite E-356 Indianapolis, IN 46220		PC	To support the 2022 INNOPOWER Minority Business Conference.	15,000
Inside Higher Education Amex 1150 Connecticut Avenue Northwest Washington, DC 20036		PC	To support an Inside Higher Ed webcast about what community colleges are doing to reverse enrollment declines.	15,000
Martin University 2186 North Sherman Drive Indianapolis, IN 46218		PC	To support the Martin University 2022 Empowering Excellence Gala.	15,000
Metropolitan Indianapolis Public Broadcasting 1630 North Meridian Street Suite 2 Indianapolis, IN 462021437		PC	To support the Listen Up Series	15,000
Santa Fe Community College Foundation 6401 Richards Avenue Santa Fe, NM 87508		PC	Convening to educate key public policy stakeholders on the value of non-credit education, touching on high value certificates, best practices from other states, how might New Mexico move forward in non-credit education to benefit students and employers.	15,000
Southern Regional Education Board 592 Tenth Street Northwest Atlanta, GA 303185790		PC	To support the SREB Student Success Summit.	15,000
Texas Higher Education Foundation 1200 East Anderson Lane Austin, TX 78752		PC	Support for Annual Higher Education Conference.	15,000
Yavapai College 1100 East Sheldon Street Prescott, AZ 863013297		PC	To support the launch of the Latino Parent Academy at Yavapai College.	15,000
University of Wisconsin Foundation 1848 University Avenue Madison, WI 537264090		PC	To support broadening access to the book "New Models of Higher Education: Unbundled, Rebundled, Customized, & DIY."	13,125
Center for Leadership Development 2425 Dr Martin Luther King Jr Str Indianapolis, IN 462085546		PC	To support the 42nd Annual Minority Achievers Awards & Scholarship Gala.	12,500
Higher Education Leadership Foundation 1203 E Grand Avenue 330 Marshall, TX 75670		PC	To support the ideation, innovation, collaboration conference of the Higher Education Leadership Foundation.	11,000
American Association Of Blacks in Higher Education 1155 F St NW Washington, DC 20004		PC	To support the AABHE National Symposium.	10,000
Asian AmericansPacific Islanders in Philanthropy 2201 Broadway 720 Oakland, CA 94612		PC	To support the 2022 AAPIP and NAP Gathering.	10,000
Association of Black Foundation Executives Inc 55 Exchange Place Suite 401 New York, NY 10005		PC	To support the 2022 ABFE Harambee Annual Conference.	10,000
Central Indiana Community Foundation 615 N Alabama St 119 Indianapolis, IN 46204		PC	To support the Power of Women event.	10,000
Children's Bureau Inc 1575 Dr Martin Luther King Jr Str Indianapolis, IN 46202		PC	To provide general program support to the Firefly Children & Family Alliance	10,000
Coburn Place Safe Haven 604 East 38th Street Indianapolis, IN 46205		PC	To support the Apartment Sponsorship program.	10,000
Complete College America 350 Massachusetts Ave Suite 300 Indianapolis, IN 46204		PC	To support CCA's Annual Convening.	10,000
Council for Opportunity in Education 1025 Vermont Ave NW Suite 900 Washington, DC 20005		PC	To support the COE annual conference	10,000
Excelencia in Education Inc 1156 15th Street NW Suite 1001 Washington, DC 20005		PC	To support the Examples of Excelencia and Celebracion de Excelencia event.	10,000
Grantmakers for Education 400 SE 103rd Drive 33348 Portland, OR 97216		PC	To support the 2022 GFE Annual Conference.	10,000
Hispanics in Philanthropy 414 13th Street Suite 200 Oakland, CA 94612		PC	To support the 2023 HIP Annual Conference.	10,000
Indiana Conference for Women LTD 9245 North Meridian Street Suite 3 Indianapolis, IN 46260		PC	To support the 2022 Indiana Conference for Women.	10,000
Indianapolis Zoological Society 1200 West Washington StreetPO Box Indianapolis, IN 46222		PC	To support Zoobilation 2023.	10,000
International Center The One Indiana Square Suite 200 Indianapolis, IN 46204		SO I	To support the International Center's International Citizen of the Year event as well as intercultural trainings and events in Indianapolis.	10,000
Scholarship America 1550 American Boulevard EastSuite 1 Minneapolis, MN 554251197		PC	To support the 2022 Dreams to Success event.	10,000
Second Helpings Inc 1121 Southeastern Avenue Indianapolis, IN 46202		PC	To support Second Helpings Hunger Relief and Food Rescue programs.	10,000
ACT Inc 500 ACT DrivePO Box 168 Iowa City, IA 52245		PC	the ACAC conference is a national effort to increase the number of first-generation college students and students from low-income families pursuing a college degree or other higher education credential.	10,000
Arnolt Center for Investigative Reporting The Media School Indiana Univers PO Box 500 Bloomington, IN 47402		PC	To support the 2023 Investigative Journalism Symposium for the Arnolt Center for Investigative Reporting at the Media School.	10,000
Big Car Media Inc 615 North Alabama Street 119 Indianapolis, IN 46204		PC	To support the Abloom with Art and Community project .	10,000
Breastfeeding Outreach for Greater Washington 1020 19th St NW Suite 150 Washington, DC 20036		PC	To support the donor milk program	10,000
Capital Area Food Bank Inc 4900 Puerto Rico Ave NE Washington, DC 20017		PC	To provide general operating support to the Capital Area Food Bank.	10,000
Community Partners 1000 Alameda StreetSuite 240 Los Angeles, CA 90012		PC	To support California Compete's 10th Anniversary Celebration.	10,000
Economic Club of Indiana The 1630 North Meridian Street Indianapolis, IN 46202		PC	To support the Economic Club speaker series for 2022-2023	10,000
Generation Hope 415 Michigan Avenue NE Suite 430 Washington, DC 20017		PC	To support Generation Hope's Spring Event Series.	10,000
Georgia State University Foundation PO Box 2668 Atlanta, GA 303012668		PC	To support a professional development fund in the name of an Education Writers Association member killed this spring in Virginia by a stray bullet.	10,000
Grantmakers Concerned with Immigrants and Refugees PO Box 1100 Sebastopol, CA 95473		PC	GCIR's national convening is the foremost gathering in philanthropy on immigrant and refugee issues.	10,000
Greater DC Diaper Bank 1532 A Street NE Washington, DC 20002		PC	To support the Greater DC Diaper Bank Diaper Distribution.	10,000
Greater DC Diaper Bank 1532 A Street NE Washington, DC 20002		PC	To provide general operating support to the Greater DC Diaper Bank.	10,000
Indiana Diaper Bank 9511 Angola Ct Indianapolis, IN 46032		PC	To provide general support to the Indiana Diaper Bank's Diaper Distribution Network.	10,000
Indiana Diaper Bank 9511 Angola Ct Indianapolis, IN 46032		PC	To provide start-up support for the Indianapolis Public Schools partnership.	10,000
Indiana Town Halls Inc 207 Buckingham Drive Indianapolis, IN 462083625		PC	To support informed civil dialogue between elected officials and the public through Indiana Town Hall meetings.	10,000
Indianapolis Public Schools Education Foundation Inc 120 East Walnut Street Room 104B Indianapolis, IN 46204		PC	To provide support to Crispus Attucks Museum's new projects.	10,000
Indy Reads 40 East Saint Claire Street Indianapolis, IN 46204		PC	To support the inaugural breakfast fundraiser: Together, Indy Reads.	10,000
IZ NEST Healthy Hoosier Babies Program Inc PO Box 2271 Indianapolis, IN 46206		PC	To provide support for their education series and gift card program for expectant mothers.	10,000
Leukemia and Lymphoma Society 530 Dexter Avenue North 300 Seattle, WA 98109		PC	To provide support for Southeast (South Florida) location in memory of Marie McDammond.	10,000
Massachusetts Department of Higher Education One Ashburton Place Boston, MA 02108		PC	To support technical assistance aligned to Lumina's State Policy Agenda.	10,000
Meridian International Center 1630 Crescent Place NW Washington, DC 20009		PC	Sponsoring network reception of new audiences including diplomats, university faculty and students on global collaboration.	10,000
One World Education 1800 KENYON ST NW Washington, DC 20010		PC	To support the 2022 One World Graduation Campaign.	10,000
One World Education 1800 KENYON ST NW Washington, DC 20010		PC	To support the One World Challenge	10,000
Phoenix Theatre Inc 705 North Illinois Street Indianapolis, IN 46204		PC	To support the Phoenix Theatre in IDEA Consulting.	10,000
Postsecondary National Policy Institute 1828 L Street NW Suite 300-E Washington, DC 20036		SO I	To support the 10th Anniversary Party for the Postsecondary National Policy Institute.	10,000
School on Wheels (SOW) 2955 N Meridian Street Suite 250 Indianapolis, IN 46208		PC	To support the School on Wheels DEI Initiative.	10,000
SOME Inc 71 O Street NW Washington, DC 20001		PC	To support SOME's holiday drive	10,000
St Richard's Episcopal School 33 East 33rd Street Indianapolis, IN 46205		PC	To provide general operating support to Horizons at St. Richards program	10,000
Teachers Treasures Inc 1800 East 10th Street Indianapolis, IN 46201		PC	To support the 2022 Circle City Donut Dash 5K.	10,000
TeenWorks Inc 2820 North Meridian St Suite 1250 Indianapolis, IN 46208		SO I	To support the College Prep Bootcamp program.	10,000
University of New Hampshire Foundation Inc Elliott Alumni Center9 Edgewood Roa Durham, NH 03824		PC	To support the pilot of UNH Sustainability Institute's "Carbon Clinic".	10,000
University of South Florida Foundation Inc Sam Martha Gibbons Alumni Center4 Tampa, FL 336208000		PC	To support the FCAN Annual Summit which brings together researchers, policy makers, educators, and administrators in the state representing 17 regions, 31 counties, and over 700 organizations.	10,000
Wheeler Mission Ministries 205 East New York Street Indianapolis, IN 46204		PC	To support Wheeler Mission's efforts to address homelessness in Central Indiana.	10,000
National Press Foundation Inc 1211 Connecticut Avenue Northwest Washington, DC 20036		PC	To support the 2023 National Press Foundation journalism awards dinner.	9,800
Dominican Sisters of Springfield 1237 West Monroe Street Springfield, IL 62704		PC	To provide support in memory of Sister Mary Loyola.	9,000
United Negro College Fund 3737 North Meridian Street Suite 5 Indianapolis, IN 46208		PC	To support the 2022 UNCF Masked Ball.	7,500
Boy Scouts of America 7125 Fall Creek Road North Indianapolis, IN 46256		PC	To support the Career Education Exploring program.	7,500
Association for Practical and Professional Ethics 2961 W County Road 225 S Greencastle, IN 46135		PC	To support the creation of Ethics Bowl teams at HBCUs, HSIs, and/or Tribal Colleges for the APPE IEB.	7,500
Funders Together to End Homelessness Inc 89 South Street Suite 603 Boston, MA 02111		PC	To support Workforce Matters in facilitating a funder conversation about community college investments and priorities, with a particular emphasis on improving equitable outcomes for BIPOC learners.	7,500
Horton's Kids Inc 2233 Hunter Place SE Washington, DC 20020		PC	To support the 2022 Home Runs for Horton's Kids event.	7,500
Indianapolis Press Club Foundation Inc PO Box 40923 Indianapolis, IN 462400923		PC	To support the Thomas R Keating Competition.	7,500
Madam Walker Legacy Center 617 Indiana Avenue Suite 320 Indianapolis, IN 462023173		PC	To provide program support.	7,500
Madam Walker Legacy Center 617 Indiana Avenue Suite 320 Indianapolis, IN 462023173		PC	To support educational and cultural programming.	7,500
Indianapolis Zoological Society 1200 West Washington StreetPO Box Indianapolis, IN 46222		PC	To support the Indianapolis Prize Gala to celebrate the victories of the world's leading animal conservationists.	6,000
Indiana University Health Foundation Inc 1633 North Capitol Avenue Indianapolis, IN 46202		PC	To support 2022 Rev Indy.	6,000
Indiana University Health Foundation Inc 1633 North Capitol Avenue Indianapolis, IN 46202		PC	To support Rev 2023.	6,000
Northview Christian Life Church 12900 Hazel Dell Parkway Carmel, IN 46033		PC	To provide general support.	6,000
Cancer Support Community of Central Indiana 5150 West 71st Street Indianapolis, IN 46268		PC	To support the 2022 Laughing Matters event.	5,500
Charitable Allies Inc 9100 Purdue Road Suite 115 Indianapolis, IN 46268		PC	To support the Community Organization Legal Helpline.	5,400
Arts Council of Indianapolis 924 North Pennsylvania Street Indianapolis, IN 46204		PC	To support the 2022 Start with Art event.	5,000
Big Brothers Big Sisters of Central Indiana Inc 1433 N Meridian Street Indianapolis, IN 462084715		PC	To support The Main Event annual fundraising gala.	5,000
Central Indiana Corporate Partnership Foundation 1210 Waterway Blvd Suite 5000 Indianapolis, IN 46202		PC	To support the TechPoint - Mission41K initiative.	5,000
Children's Bureau Inc 1575 Dr Martin Luther King Jr Str Indianapolis, IN 46202		PC	To support the 13th Annual Young Professionals Advisory Board Trivia Night.	5,000
Children's Museum of Indianapolis Inc 3000 North Meridian Street Indianapolis, IN 46208		PC	To support the Museum by Moonlight event.	5,000
College Mentors for Kids Inc 6081 East 82nd Street Suite 420 Indianapolis, IN 46250		PC	To support the 2022 College Mentors for Kids National Conference.	5,000
Complete College America 350 Massachusetts Ave Suite 300 Indianapolis, IN 46204		PC	To support the CCA's Annual Summer Policy Summit.	5,000
Complete College America 350 Massachusetts Ave Suite 300 Indianapolis, IN 46204		PC	To support Complete College America's Annual Summer Policy Summit	5,000
La Plaza Inc 8902 East 38th Street Indianapolis, IN 46226		PC	To support the La Plaza Night of the Americas.	5,000
United Negro College Fund 8260 Willow Oaks Corporate DrivePO Fairfax, IN 46208		PC	To support the UNCF Unite 2022 convening focused on Black higher education	5,000
YMCA of Greater Indianapolis 615 North Alabama StreetSuite 200 Indianapolis, IN 46204		PC	To support the YMCA at the Athenaeum Breakfast with Santa.	5,000
Bloomington Pearl Foundation PO Box 1044 Bloomington, IN 47402		PC	To support the Cocktails for a Cause event.	5,000
Casa Chirilagua 4109 Mount Vernon Ave Alexandria, VA 22305		PC	To support the Local Leaders Program.	5,000
Dayspring Center Inc PO Box 44105 Indianapolis, IN 46244		PC	To support Dayspring Center's Education and Children's programs.	5,000
Education Trust - West The 580 2nd Street Suite 200 Oakland, CA 94607		PC	To support Education Trust West's Education Equity Forum	5,000
Franklin College of Indiana 101 Branigin Boulevard Franklin, IN 46131		PC	To support the Inaugural National Trauma Journalism Symposium.	5,000
Herron High School 110 East 16th Street Indianapolis, IN 46202		PC	To support the Herron Classical Schools Second Annual Movie Night at Tibbs Drive-In	5,000
Humane Society of Hamilton County 10501 Hague Road Fishers, IN 46038		PC	To support the 2022 Tinsel and Tails event.	5,000
Indianapolis Public Schools Education Foundation Inc 120 East Walnut Street Room 104B Indianapolis, IN 46204		PC	To support the Shortridge High School 2022 Spring Musical Production.	5,000
Indy Black Chamber of Commerce 1449 North Pennsylvania StreetSuite Indianapolis, IN 46202		PC	To support the ke'loor event.	5,000
Indy Eleven Foundation 47 South Pennsylvania Street Suite Indianapolis, IN 46204		PC	To support underprivileged and under served members of the Community. Recognizing Groups and Organizations in the Community with the program.	5,000
Interstate Renewable Energy Council Inc 125 Wolf Road Suite 207 Albany, NY 12205		PC	To support the 2022 Vision Summit in Washington, DC.	5,000
Junior Achievement of Central Indiana Inc (JA) 7435 N Keystone Avenue Door 5 Indianapolis, IN 46240		PC	To support the Central Indiana Business Hall of Fame event.	5,000
Latino Community Development Corporation 9445 Champton Dr Indianapolis, IN 46256		PC	To support the 2022 Santa Comes to Town event.	5,000
Lawrence Township School Foundation 6501 Sunnyside Road Indianapolis, IN 46236		PC	To support the LCPAA 100 for 100 campaign.	5,000
Military Veterans in Journalism Inc 10824 Margate Road Silver Spring, MD 20901		PC	To support Military Veterans in Journalism's 2022 convention providing professional development and career connections to military veterans working in the news media.	5,000
Mind Trust Inc The 1630 North Meridian Street Suite 4 Indianapolis, IN 46202		PC	To support the Celebrating Education Innovation dinner.	5,000
Mozel Sanders Foundation 709 North Belmont Avenue Indianapolis, IN 46222		PC	To support the 2022 Annual Mozel Sanders Thanksgiving Dinner.	5,000
OutCare Health Inc 7050 Wildridge Dr Indianapolis, IN 46256		PC	To support the OutCare Health Annual Gala.	5,000
Outreach Inc PO Box 11416 Indianapolis, IN 46201		PC	To support Outreach, Inc. in the Walking for Dreams event.	5,000
SOME Inc 71 O Street NW Washington, DC 20001		PC	To support job training services provided by SOME.	5,000
United Northeast Community Development Corporation 3908 Meadows Drive Suite 208 Indianapolis, IN 46205		PC	To provide general operation support to the United Northeast Development Corporation.	5,000
Warren Arts and Education Foundation 975 N Post Rd Indianapolis, IN 46219		PC	To support the Warren Arts & Education Foundation 2023 Gala.	5,000
Indiana Natural Resources Foundation 402 West Washington W256 Indianapolis, IN 46204		PC	To provide general support.	4,500
NAFSA Association of International Educators 1425 K Street NW Washington, DC 20005		PC	Become an Associate Global Partner to engage with NAFSA's membership and conference attendees.	4,500
American Historical Association 400 A Street SE Washington, DC 20003		PC	To support AHA's 136th Annual Meeting.	3,000
Chinese Education Freedom Fund PO Box 304 Winter Park, FL 327900304		PC	To provide support.	3,000
Grantmakers for Education 400 SE 103rd Drive 33348 Portland, OR 97216		PC	To support, along with other foundations, a GFE/SREE fellow to conduct a study of joint interest.	2,500
Indiana State Chamber of Commerce Foundation Inc 115 West Washington Street Suite 8 Indianapolis, IN 46204		SO I	To support the Diversity, Equity & Inclusion Summit.	2,500
Indiana Philanthropy Alliance PO Box 20712 Indianapolis, IN 46220		PC	To support the IPA's 2022 Fall Networking Event & 2023 Spring Organizational Networking Luncheon.	2,500
Mentoring Women's Network Foundation 202 East Market Street Indianapolis, IN 46204		PC	To support the 2022 Pass the Torch Day Celebration.	2,500
Michigan College Access Network 200 N Washington Sq Ste 210 Lansing, MI 48933		PC	To support the Michigan College Access Network's 11th annual conference	2,500
Arts for Learning 540 East 11th Street Suite 200 Indianapolis, IN 46202		PC	To support the ARTS POP! 60th Anniversary event.	2,500
Association for Career and Technical Education 1410 King Street Alexandria, VA 22314		PC	To support ACTE's first annual postsecondary CTE convening.	2,500
Become Inc 207 E Ohio St Unite 291 Chicago, IL 60611		PC	To support the Love & Liberation Festival, a Juneteenth celebration focusing on the goals of community change	2,500
Cathedral High School 5225 E 56th Street Indianapolis, IN 46226		PC	To support the 2022 Cathedral Trivia Night.	2,500
Conner Prairie Museum Inc 13400 Allisonville Road Fishers, IN 46038		PC	To support the Strut Up Frederick Douglass in Rhythm, Rap, and Jazz event.	2,500
Eiteljorg Museum of American Indians & Western Art White River State Park500 W Washin Indianapolis, IN 462042707		PC	To provide support for the Project 2021 museum and exhibit endeavor.	2,500
Hope Academy Inc 3919 Madison Avenue Suite 100 Indianapolis, IN 46227		PC	To support the Rise & Shine for Hope fundraising breakfast.	2,500
Ibada Dancers Inc PO Box 22265 Indianapolis, IN 46222		PC	To support the production of "The Brave".	2,500
Mount Moriah Missionary Baptist Church 2349-51 North Keystone Way Indianapolis, IN 46218		PC	Community event designed to bring awareness and action to combat the scourge of domestic violence in Central Indiana and beyond.	2,500
New Hope of Indiana Inc 8450 N Payne Rd 300 Indianapolis, IN 46268		PC	To support the Silver Cup Celebration.	2,500
Rockefeller Philanthropy Advisors Inc 90 Church Street New York, NY 10008		PC	To support Partnership for American Democracy's convening on combating misinformation and addressing election integrity featuring several higher education leaders	2,500
St Richard's Episcopal School 33 East 33rd Street Indianapolis, IN 46205		PC	To support the 2022 Regalia fundraising event.	2,500
Warren Arts and Education Foundation 975 N Post Rd Indianapolis, IN 46219		PC	To support the Education Impact Gala.	2,500
Nova X-Stream 13481 Davenport Dr Fishers, IN 46037		PC	To provide support for the Nyla Nova STEMversity.	2,000
Little Sisters of the Poor of Indianapolis Inc 2345 West 86th Street Indianapolis, IN 46260		PC	To provide program support.	1,800
George Washington University The Office of Sponsored Projects 2121 Washington, DC 20052		PC	To provide support in memory of Steve Crawford.	1,000
Indiana Sports Corporation 201 South Capitol Avenue Indianapolis, IN 46225		PC	To support the Indiana Sports Corporation's Corporate Challenge.	1,000
Florida Association for Institutional Research Inc 1000 College Blvd Pensacola, FL 32504		NC	To support the 2022 Florida Association for Institutional Research annual conference.	1,000
Northwest Central Indiana Community Partnerships Inc 1281 Win Hentschel Blvd Suite 2161 West Lafayette, IN 47906		SO I	To support the 2022 WHIN Annual Meeting.	1,000
Partnerships for Lawrence Inc 8920 Otis Ave Indianapolis, IN 46216		PC	To support the Juneteenth Jubilee.	1,000
Society for the Propagation of the Faith 70 West 36th Street 8th Floor New York, NY 10018		PC	To provide program support.	900
Westminster College 501 Westminster Avenue Fulton, MO 65251		PC	To provide general support.	749
St Mark's United Methodist Church 100 North Highway 46 Bypass Bloomington, IN 47408		PC	To support the Nursery School Scholarships.	450
Christ Church Cathedral 125 Monument Circle Indianapolis, IN 46204		PC	To provide program support.	420
Champaign Parks Foundation Bresnan Meeting Center 706 Kenwood Champaign, IL 61821		PC	To support the fundraising efforts of Virginia Theatre.	375
Paul Quinn College 3837 Simpson Stuart Rd Dallas, TX 75241		PC	To support the fundraising efforts of need-based financial aid.	375
Christ Church Cathedral 125 Monument Circle Indianapolis, IN 46204		PC	To provide support.	150
Christ Church Cathedral 125 Monument Circle Indianapolis, IN 46204		PC	To provide community support.	120
George Washington University 45155 Research Place Suite 180 Ashburn, VA 20147		PC	Donation in Lieu of flowers	100
Parkinson's Foundation 200 SE 1st Street Suite 800 Miami, FL 33131		PC	Donation in Lieu of Flowers	100
Trinity Free Clinic 1045 West 146th Street Suite B Carmel, IN 46032		PC	In memory of Wayne Shoemaker.	100
Wounded Warrior Project 4899 Belfort Road Suite 300 Jacksonville, FL 32256		PC	In memory of Donald L. Steward.	100
Total . . . . ▶ 3a				53,921,229
b *Approved for future payment*				
Quality Education for Minorities Network 1818 N St NW Suite 350 Washington, DC 20036		PC	To develop a framework for Indigenous student success	150,000
Research Foundation of CUNY 230 West 41st Street 7th Floor New York, NY 10036		PC	To support CUNY's Second Year Success Campaign and CUNY's Lecturer Hiring Initiative	204,700
Total . . . . ▶ 3b				354,700

Part XV-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions.)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue:					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities		6,564,372	14	2,725,146	
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory		3,285,355	18	88,802,265	
9 Net income or (loss) from special events:					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:					
a			15	6,780	
b					
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)		9,849,727		91,534,191	0
13 **Total.** Add line 12, columns (b), (d), and (e). (See worksheet in line 13 instructions to verify calculations.)				13	101,383,918

Part XV-B Relationship of Activities to the Accomplishment of Exempt Purposes

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XV-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes). (See instructions.)

Part XVI Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

			Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a	Transfers from the reporting foundation to a noncharitable exempt organization of:			
	(1) Cash	1a(1)	Yes	
	(2) Other assets	1a(2)		No
b	Other transactions:			
	(1) Sales of assets to a noncharitable exempt organization	1b(1)		No
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)		No
	(3) Rental of facilities, equipment, or other assets	1b(3)		No
	(4) Reimbursement arrangements	1b(4)		No
	(5) Loans or loan guarantees	1b(5)		No
	(6) Performance of services or membership or fundraising solicitations	1b(6)		No
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		No

d If the answer to any of the above is "Yes," complete the following schedule. Column **(b)** should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column **(d)** the value of the goods, other assets, or services received.

(a) Line No.	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements
1a(1)	1,290	AICPA	organizational membership dues
1a(1)	550	American Payroll Institute INC	organizational membership dues
1a(1)	350	Chartered Alt Investment Analyst Association	organizational membership dues
1a(1)	1,582	Indiana CPA Society (INCPAS)	organizational membership dues
1a(1)	2,000	Indy Chamber	organizational membership dues
1a(1)	275	New York State Bar Assocation	organizational membership dues
1a(1)	229	SHRM Society for Human Resource Mgmt	organizational membership dues

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) (other than section 501(c)(3)) or in section 527? ☐ Yes ☑ No

b If "Yes," complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship

Sign Here

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

2023-11-15

Signature of officer or trustee — Date — Title

May the IRS discuss this return with the preparer shown below? See instructions. ☐ Yes ☐ No

Paid Preparer Use Only

Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ▶☐	PTIN
Nicole M Bencik				P00756195

Firm's name ▶ CROWE LLP — Firm's EIN ▶35-0921680

Firm's address ▶ 3815 River Crossing Parkway Suite 300 Indianapolis, IN 462400977 — Phone no. (317) 569-8989

Additional Data

Return to Form

Software ID: 22016089
Software Version: 2022v5.0

Form 990PF - Special Condition Description:

Special Condition Description

Schedule B

(Form 990)
Department of the Treasury
Internal Revenue Service

Schedule of Contributors

▶ **Attach to Form 990, 990-EZ, or 990-PF.**
▶ **Go to *www.irs.gov/Form990* for the latest information.**

OMB No. 1545-0047

2022

Name of the organization
Lumina Foundation for Education Inc

Employer identification number
35-1813228

Organization type (check one):

Filers of:	**Section:**
Form 990 or 990-EZ	☐ 501(c)( ) (enter number) organization
	☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
	☐ 527 political organization
Form 990-PF	☑ 501(c)(3) exempt private foundation
	☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
	☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule.**
Note: Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

☑ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling $5,000 or more (in money or other property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

Special Rules

☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33$^{1}/_{3}$% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** $5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than $1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than $1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling $5,000 or more during the year . . . . . ▶ $ _____

Caution: An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Name of organization
Lumina Foundation for Education Inc

Employer identification number
35-1813228

Part I **Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

Contributors

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	Community Foundation of Greater Buffalo 726 Exchange Street Suite 525 Buffalo, NY 14210	$ 30,000	☑ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)

Name of organization
Lumina Foundation for Education Inc

Employer identification number
35-1813228

Part II **Noncash Property** (see instructions). Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		$	

Name of organization
Lumina Foundation for Education Inc

Employer identification number
35-1813228

Part III ***Exclusively*** **religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than $1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of $1,000 or less for the year. (Enter this information once. See instructions.)** ▶ **$** _____

Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift Transferee's name, address, and ZIP 4		Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift Transferee's name, address, and ZIP 4		Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift Transferee's name, address, and ZIP 4		Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift Transferee's name, address, and ZIP 4		Relationship of transferor to transferee

Additional

Data

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Software ID: 220

ware Version: 202

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Return to Form

TY 2022 IRS 990 e-File Render

Name: Lumina Foundation for Education Inc

EIN: 35-1813228

Software ID: 22016089

Software Version: 2022v5.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	193,659	9,648		100,461

TY 2022 IRS 990 e-File Render

Name: Lumina Foundation for Education Inc

EIN: 35-1813228

Software ID: 22016089

Software Version: 2022v5.0

Category	Amount
Beam: Scalable platform providing financial tools and resources to support postsecondary completion rates.	600,000
EdVisorly: Software platform designed to foster student success.	500,000
The Reinvestment Fund, Inc: PRI loan to address the level of philanthropic, government, and other financial support to HBCUs.	500,000
College Consortium, Inc. (Acadeum): Early stage venture focused on course sharing across institutions to support student success.	208,433
EduNav: Early stage venture with a software product to increase on-time completion rates for students enrolled in postesecondary institution.	171,000
Brighthive: Software product that enables multi-party data networks between education providers, employers, government agencies and learners.	50,000

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2022 IRS 990 e-File Render

Name: Lumina Foundation for Education Inc

EIN: 35-1813228

Software ID: 22016089

Software Version: 2022v5.0

Description of Property	Date Acquired	Cost or Other Basis	Prior Years' Depreciation	Computation Method	Rate / Life (# of years)	Current Year's Depreciation Expense	Net Investment Income	Adjusted Net Income	Cost of Goods Sold Not Included
DEPRECIATION EXPENSE- COMPUTER EQUIPMENT						212,769	19,085		
DEPLETION							432,713		

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2022 IRS 990 e-File Render

Name: Lumina Foundation for Education Inc
EIN: 35-1813228
Software ID: 22016089
Software Version: 2022v5.0

Grantee's Name	Grantee's Address	Grant Date	Grant Amount	Grant Purpose	Amount Expended By Grantee	Any Diversion By Grantee?	Dates of Reports By Grantee	Date of Verification	Results of Verification
College Consortium Inc Acadeum	210 Barton Springs Rd Suite 100 Austin, TX 78704	2019-12-19	1,000,000	On-line course sharing among college networks.	0		Interim reports received and/or attended meetings every month in 2022		
College Consortium Inc Acadeum	210 Barton Springs Rd Suite 100 Austin, TX 78704	2021-02-12	300,000	On-line course sharing among college networks.	0		Interim reports received and/or attended meetings at least monthly during 2022.		
Bitwise	700 Van Ness Ave Fresno, CA 93721	2018-12-21	1,500,000	Support growth and expansion of technology training focused on women and minorities.	0		Interim reports received and/or attended meetings: 5/6/2022; 9/8/2022		
Brighthive	20 West Kinzie Chicago, IL 60654	2019-12-23	500,000	Software product that enables multi-party data networks between education providers, employers, government agencies and learners.	0		2/25/2022; 5/18/2022; 9/30/2022; 11/28/2022; 12/16/2022		
Brighthive	20 West Kinzie Chicago, IL 60654	2018-11-19	999,995	Software product that enables multi-party data networks between education providers, employers, government agencies and learners.	0		2/25/2022; 5/18/2022; 9/30/2022; 11/28/2022; 12/16/2022		
Care Academy	281 Summer Street Boston, MA 02210	2017-08-09	500,000	High quality training for in-home caregivers	0		2/22/2022; 5/11/2022; 7/28/2022; 8/1/2022; 8/3/2022; 10/22/2022; 12/16/2022		
Care Academy	281 Summer Street Boston, MA 02210	2018-10-25	250,000	High quality training for in-home caregivers.	0		2/22/2022; 5/11/2022; 7/28/2022; 8/1/2022; 8/3/2022; 10/22/2022; 12/16/2022		
Cell-Ed	855 El Camino Real Suite 13A-212 Palo Alto, CA 94301	2018-06-01	1,000,000	Platform for employers and education providers to upskill and retain workers through delivery of micro-lessons.	0		2/22/2022; 5/11/2022; 7/28/2022; 8/1/2022; 8/3/2022; 10/22/2022; 12/16/2022		
Cell-ed	855 El Camino Real Suite 13A-212 Palo Alto, CA 94301	2019-12-20	375,000	Platform for employers and education providers to up-skill and retain workers through delivery of micro-lessons.	0		2/22/2022; 5/11/2022; 7/28/2022; 8/1/2022; 8/3/2022; 10/22/2022; 12/16/2022		
Credly INC	404 5th Ave 3rd Floor New York, NY 10018	2018-10-31	500,000	To support digital badge solution for managing credentials.	0		NA		
CREDLY INC	404 5th Ave 3rd Floor New York, NY 10018	2017-03-17	500,000	To support digital badge solution for managing credentials.	0		NA		
Edovo	215 W Superior Street Suite 600 Chicago, IL 60654	2019-04-12	349,997	Online education and self-improvement tools for prison inmates.	0		2/16/2022; 5/5/2022; 8/12/2022; 11/4/2022, 11/4/2022		
Edovo	215 W Superior Street Suite 600 Chicago, IL 60654	2017-07-18	750,000	Meaningful access to education, communication, and self-improvement tools for those affected by incarceration	0		2/16/2022; 5/5/2022; 8/12/2022; 11/4/2022, 11/4/2022		
Edquity	125 Court St Apt 3NH Brooklyn, NY 11201	2019-04-25	200,000	Platform providing financial tools and resources to support post-secondary completion rates.	0		2/16, 4/14, 4/19, 6/1, 9/20, 9/22, 11/15,12/12		
Edquity	125 Court St Apt 3NH Brooklyn, NY 11201	2020-11-03	300,000	Platform providing financial tools and resources to support post-secondary completion rates.	0		2/16, 4/14, 4/19, 6/1, 9/20, 9/22, 11/15, 12/12		
Edquity	125 Court St Apt 3NH Brooklyn, NY 11201	2021-10-30	500,000	Platform providing financial tools and resources to support postsecondary completion rates.	0		2/16, 4/14, 4/19, 6/1, 9/20, 9/22, 11/15, 12/12		
EduNav	11215 Mount Crest Place Cupertino, CA 95014	2019-09-01	1,500,000	Academic planning software to provide students, advisors, and institutions timely data to increase learner on-time completion rates.	0		2/16/2022; 5/23/2022; 8/11/2022; 11/5/2022; 12/8/2022		
EduNav	11215 Mount Crest Place Cupertino, CA 95014	2020-12-22	100,000	Academic planning software to provide students, advisors, and institutions timely data to increase learner on-time completion rates.	0		2/16/2022; 5/23/2022; 8/11/2022; 11/5/2022; 12/8/2022		
Mentor	294 Washington	2019-08-	999,999	Scalable mentorship programs partnering with postsecondary	0		2/16/2022; 5/15/2022; 8/29/2022;		

Grantee's Name	Grantee's Address	Grant Date	Grant Amount	Grant Purpose	Amount Expended By Grantee	Any Diversion By Grantee?	Dates of Reports By Grantee	Date of Verification	Results of Verification
Collective	St Suite 607 Boston, MA 02108	28		institutions targeting Lumina's focused learner demographics.			10/24/2022; 10/31/2022; 11/3/2022		
Mentor Collective	294 Washington St Suite 607 Boston, MA 02108	2020-11-24	250,000	Scalable mentorship programs partnering with postsecondary institutions targeting Lumina's focused learner demographics.	0		2/16/2022; 5/15/2022; 8/29/2022; 10/24/2022; 10/31/2022; 11/3/2022		
Upswing	44 East Avenue Suite 200 Austin, TX 78701	2017-07-06	750,000	Technology focused on improving student success through mentoring, advising and tutoring	0		2/16; 3/21; 4/20; 5/12; 5/16; 8/1; 10/23; 11/3		
Upswing	44 East Avenue Suite 200 Austin, TX 78701	2018-11-19	500,000	Technology focused on improving student success through mentoring, advising and tutoring	0		2/16; 3/21; 4/20; 5/12; 5/16; 8/1; 10/23; 11/3		
Upswing	44 East Avenue Suite 200 Austin, TX 78701	2020-12-29	340,000	Technology focused on improving student success through mentoring, advising and tutoring	0		2/16; 3/21; 4/20; 5/12; 5/16; 8/1; 10/23; 11/3		
Viridis	3505 El Camino Real Palo Alto, CA 94306	2017-07-18	500,000	Technology platform providing students with guided career pathways and employer job matching	0		NA		
Viridis	3505 El Camino Real Palo Alto, CA 94306	2016-08-08	750,000	Technology platform providing students with guided career pathways and employer job matching	0		NA		
Edvisorly	5630 Venice Blvd Suite 1020 Los Angeles, CA 90019	2022-12-16	500,000	Software platform connects students with 2YR and 4YR partners for degree completion.	0		NA		

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2022 IRS 990 e-File Render

Name: Lumina Foundation for Education Inc
EIN: 35-1813228
Software ID: 22016089
Software Version: 2022v5.0

Name	Date Acquired	How Acquired	Date Sold	Purchaser Name	Gross Sales Price	Basis	Basis Method	Sales Expenses	Total (net)	Accumulated Depreciation
					92,087,620				92,087,620	

TY 2022 IRS 990 e-File Render

Name: Lumina Foundation for Education Inc

EIN: 35-1813228

Software ID: 22016089

Software Version: 2022v5.0

Name of Bond	End of Year Book Value	End of Year Fair Market Value
Corporate bonds	44,753,056	44,753,056

TY 2022 IRS 990 e-File Render

Name: Lumina Foundation for Education Inc

EIN: 35-1813228

Software ID: 22016089

Software Version: 2022v5.0

Name of Stock	End of Year Book Value	End of Year Fair Market Value
Corporate stock	373,651,417	373,651,417

TY 2022 IRS 990 e-File Render

Name:	Lumina Foundation for Education Inc
EIN:	35-1813228
Software ID:	22016089
Software Version:	2022v5.0
US Government Securities - End of Year Book Value:	9,382,008
US Government Securities - End of Year Fair Market Value:	9,382,008
State & Local Government Securities - End of Year Book Value:	0
State & Local Government Securities - End of Year Fair Market Value:	0

TY 2022 IRS 990 e-File Render

Name: Lumina Foundation for Education Inc

EIN: 35-1813228

Software ID: 22016089

Software Version: 2022v5.0

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
Other	FMV	903,160,141	903,160,141

TY 2022 IRS 990 e-File Render

Name: Lumina Foundation for Education Inc

EIN: 35-1813228

Software ID: 22016089

Software Version: 2022v5.0

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
LEASEHOLD IMPROVEMENTS	1,387,070	1,208,868	178,202	88,188
FURNITURE AND EQUIPMENT	4,455,212	4,367,025	88,187	178,202
OTHER ASSETS	1,930,996	1,865,369	65,627	65,626

TY 2022 IRS 990 e-File Render

Name: Lumina Foundation for Education Inc

EIN: 35-1813228

Software ID: 22016089

Software Version: 2022v5.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL FEES	674,827	197,512		438,994

TY 2022 IRS 990 e-File Render

Name: Lumina Foundation for Education Inc

EIN: 35-1813228

Software ID: 22016089

Software Version: 2022v5.0

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
PROGRAM RELATED INVESTMENTS	24,116,611	26,557,485	26,557,485
CHARITABLE REMAINDER TRUST	728,073	607,802	607,802
OTHER ASSETS	150,000	0	0
OPERATING LEASE RIGHT-OF-USE ASSET	0	3,041,120	3,041,120
INVESTMENT PROCEEDS RECEIVABLE	3,735,506	28,309,427	28,309,427

TY 2022 IRS 990 e-File Render

Name: Lumina Foundation for Education Inc

EIN: 35-1813228

Software ID: 22016089

Software Version: 2022v5.0

Description	Amount
UNREALIZED LOSS	505,481,596
CHARITABLE REMAINDER ADJUSTMENTS	120,271

TY 2022 IRS 990 e-File Render

Name: Lumina Foundation for Education Inc

EIN: 35-1813228

Software ID: 22016089

Software Version: 2022v5.0

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
GRANT PROGRAM EXPENSE	11,906,346			11,903,346
DUES	413,708			413,709
RECRUITING/STAFF DEVELOPMENT	336,962	2,605		334,357
OFFICE EXPENSE	217,215	573		216,642
INSURANCE EXPENSE	141,269			141,269
COMMUNICATIONS/TECHNOLOGY	808,889	65,742		982,313
OTHER MISCELLANEOUS EXPENSE	206,467	76		6,391
OTHER EXPENSES FROM K-1'S		10,301,170		

TY 2022 IRS 990 e-File Render

Name: Lumina Foundation for Education Inc

EIN: 35-1813228

Software ID: 22016089

Software Version: 2022v5.0

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
OTHER INVESTMENT INCOME/LOSS	6,780	6,780	
TOTAL OF OTHER INCOME LISTED ON K-1'S		11,113,816	
TAX EXPENSE/CREDIT PER BOOKS	1,676,553		

TY 2022 IRS 990 e-File Render

Name: Lumina Foundation for Education Inc

EIN: 35-1813228

Software ID: 22016089

Software Version: 2022v5.0

Description	Amount
UNREALIZED GAIN	257,979,979

TY 2022 IRS 990 e-File Render

Name: Lumina Foundation for Education Inc

EIN: 35-1813228

Software ID: 22016089

Software Version: 2022v5.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT MANAGER FEES	3,035,923	2,723,223		
VARIOUS OTHER PROFESSIONAL/CONSULTING FEES	1,472,053			1,332,963

TY 2022 IRS 990 e-File Render

Name: Lumina Foundation for Education Inc

EIN: 35-1813228

Software ID: 22016089

Software Version: 2022v5.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAXES PAID ON K-1'S		188,537		

TY 2022 IRS 990 e-File Render

Name: Lumina Foundation for Education Inc

EIN: 35-1813228

Software ID: 22016089

Software Version: 2022v5.0

Name	US / Foreign Address	EIN	Description	Amount
VIA Alpha LP	88 Main St Peapack, NJ 079770131	26-0648552	99% ownership interest in partnership	0
Total				