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

2023

Open to Public Inspection

For calendar year 2023, or tax year beginning 01-01-2023 , and ending 12-31-2023

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)
820 Massachusetts Ave Suite 1390

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)* ▶$ 1,447,572,232

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)				
	2 Check ▶☐ if the foundation is **not** required to attach Sch. B				
	3 Interest on savings and temporary cash investments	135,360	135,360		
	4 Dividends and interest from securities	12,159,694	15,392,955		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	42,020,517			
	b Gross sales price for all assets on line 6a: 624,909,000				
	7 Capital gain net income (from Part IV, line 2)		28,168,263		
	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)	16,092	10,336,684	0	
	12 **Total.** Add lines 1 through 11	54,331,663	54,033,262	0	
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc.	3,765,951	125,752		3,625,760
	14 Other employee salaries and wages	7,415,379	391,955		6,900,501
	15 Pension plans, employee benefits	1,506,910	160,489		3,166,105
	16a Legal fees (attach schedule)	611,752	130,108	0	447,198
	b Accounting fees (attach schedule)	250,368	22,860	0	18,737
	c Other professional fees (attach schedule)	5,061,866	3,202,177	0	1,403,171
	17 Interest	225,467			225,467
	18 Taxes (attach schedule) (see instructions)	1,198,804	384,758	0	0
	19 Depreciation (attach schedule) and depletion	170,572	573,936	0	
	20 Occupancy	904,744	81,155		813,914
	21 Travel, conferences, and meetings	1,183,314	3,972		1,763,495
	22 Printing and publications	576,730			493,269
	23 Other expenses (attach schedule)	12,639,273	11,319,193	0	12,649,398
	24 **Total operating and administrative expenses.** Add lines 13 through 23	35,511,130	16,396,355	0	31,507,015
	25 Contributions, gifts, grants paid	54,831,247			55,173,681
	26 **Total expenses and disbursements.** Add lines 24 and 25	90,342,377	16,396,355	0	86,680,696
	27 Subtract line 26 from line 12:				
	a **Excess of revenue over expenses and disbursements**	-36,010,714			
	b **Net investment income** (if negative, enter -0-)		37,636,907		
	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	22,669,565	12,902,794	12,902,794
	3 Accounts receivable ▶ 1,321,928			
	Less: allowance for doubtful accounts ▶	403,362	1,321,928	1,321,928
	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	343,769	425,217	425,217
	10a Investments—U.S. and state government obligations (attach schedule)	9,382,008	19,829,005	19,829,005
	b Investments—corporate stock (attach schedule)	373,651,417	313,996,528	313,996,528
	c Investments—corporate bonds (attach schedule)	44,753,056	39,577,647	39,577,647
	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)	903,160,141	990,675,400	990,675,400
	14 Land, buildings, and equipment: basis ▶ 7,905,219			
	Less: accumulated depreciation (attach schedule) ▶ 7,511,095	332,016	394,124	394,124
	15 Other assets (describe ▶)	58,515,834	68,449,589	68,449,589
	16 **Total assets** (to be completed by all filers—see the instructions. Also, see page 1, item I)	1,413,211,168	1,447,572,232	1,447,572,232
Liabilities	17 Accounts payable and accrued expenses	36,703,399	6,520,034	
	18 Grants payable	354,700	725,000	
	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 ▶)	3,167,547	2,496,821	
	23 **Total liabilities**(add lines 17 through 22)	40,225,646	9,741,855	
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	1,372,985,522	1,437,830,377	
	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)	1,372,985,522	1,437,830,377	
	30 **Total liabilities and net assets/fund balances** (see instructions)	1,413,211,168	1,447,572,232	

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	1,372,985,522
2	Enter amount from Part I, line 27a	2	-36,010,714
3	Other increases not included in line 2 (itemize) ▶	3	322,001,646
4	Add lines 1, 2, and 3	4	1,658,976,454
5	Decreases not included in line 2 (itemize) ▶	5	221,146,077
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29	6	1,437,830,377

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	624,909,000		602,353,176	22,555,824
b	5,612,439			5,612,439
c				
d				
e				

	Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) **or** Losses (from col.(h))
	(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	
a			0	22,555,824
b			0	5,612,439
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	28,168,263
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	523,153
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	523,153
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	523,153
6	Credits/Payments:		
a	2023 estimated tax payments and 2022 overpayment credited to 2023 — 6a: 2,564,337		
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	2,564,337
8	Enter any **penalty** for underpayment of estimated tax. Check here ☑ if Form 2220 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	2,041,184
11	Enter the amount of line 10 to be: **Credited to 2024 estimated tax** ▶ 2,041,184 **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 2023 or the taxable year beginning in 2023? 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
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 ▶ 820 Massachusetts Avenue Suite 1390 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

			Yes	No
16	At any time during calendar year 2023, 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 country ▶	16		No

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

			Yes	No
	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			
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 2023?	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 2023, did the foundation have any undistributed income (Part XII, lines 6d and 6e) for tax year(s) beginning before 2023?	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 2023 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 2023.)*	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 2023?	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? *If "Yes," attach the statement required by Regulations section 53.4945–5(d).*	5d	Yes	
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? *If "Yes" to 6b, file Form 8870.*	6b		No
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
Alisa Miller 820 Massachusetts Ave Suite 1390 Indianapolis, IN 46204	Director 2.000	42,250	0	0
Allan Hubbard 820 Massachusetts Ave Suite 1390 Indianapolis, IN 46204	Director 1.000	28,000	0	0
Austan Goolsbee 820 Massachusetts Ave Suite 1390 Indianapolis, IN 46204	Director 1.000	28,000	0	0
Carmen Ambar Twillie 820 Massachusetts Ave Suite 1390 Indianapolis, IN 46204	Director 1.000	28,000	0	0
Christine Pambianchi 820 Massachusetts Ave Suite 1390 Indianapolis, IN 46204	Director 1.000	28,000	0	0
David Wilson 820 Massachusetts Ave Suite 1390 Indianapolis, IN 46204	Director 1.000	32,500	0	0
Joseph Boateng 820 Massachusetts Ave Suite 1390 Indianapolis, IN 46204	Director 2.000	34,000	0	0
Justin Christian 820 Massachusetts Ave Suite 1390 Indianapolis, IN 46204	Director 1.000	28,000	0	0
Kathy Davis 820 Massachusetts Ave Suite 1390 Indianapolis, IN 46204	Director 2.000	36,500	0	0
Matt Breitfelder 820 Massachusetts Ave Suite 1390 Indianapolis, IN 46204	Director 2.000	34,000	0	0
Matthew Goldberg 820 Massachusetts Ave Suite 1390 Indianapolis, IN 46204	Director 1.000	28,000	0	0
William Serrata 820 Massachusetts Ave Suite 1390 Indianapolis, IN 46204	Director 1.000	28,000	0	0
Chauncy Lennon 820 Massachusetts Ave Suite 1390 Indianapolis, IN 46204	VP for the Future of Learning and Work & Sr. Stratgeic Advisor 40.000	384,821	99,652	0
Courtney Brown	VP of Impact & Planning	385,382	101,242	3,433

(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
820 Massachusetts Ave Suite 1390 Indianapolis, IN 46204	40.000			
Debra Humphreys 820 Massachusetts Ave Suite 1390 Indianapolis, IN 46204	VP of Strategic Engagement 40.000	347,660	71,236	0
Erin Archer 820 Massachusetts Ave Suite 1390 Indianapolis, IN 46204	VP for Fin and Invest/CFO (as of 8/7/23) 40.000	167,803	8,537	10,012
Holiday McKiernan 820 Massachusetts Ave Suite 1390 Indianapolis, IN 46204	Exec VP/COO/ General Counsel/Secretary (until 2/28/23) 40.000	151,007	7,532	420
Hong Linh Nguyen 820 Massachusetts Ave Suite 1390 Indianapolis, IN 46204	VP, Equity Culture, & Talent 40.000	336,383	60,119	2,520
Jamie Merisotis 820 Massachusetts Ave Suite 1390 Indianapolis, IN 46204	President/CEO 40.000	1,040,873	118,707	2,520
Michelle Cooper 820 Massachusetts Ave Suite 1390 Indianapolis, IN 46204	VP, Public Policy & Executive Director 40.000	336,696	58,481	3,071
Timothy Robinson 820 Massachusetts Ave Suite 1390 Indianapolis, IN 46204	VP General Counsel & Chief of Staff 40.000	321,872	85,555	3,584

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
Cody Coppotelli 820 Massachusetts Ave Suite 1390 Indianapolis,IN 46204	Dir. of Investments 40.000	240,274	77,542	2,308
Kevin Corcoran 820 Massachusetts Ave Suite 1390 Indianapolis,IN 46204	Strategy Director 40.000	215,225	102,271	3,372
Shelley Lloyd 820 Massachusetts Ave Suite 1390 Indianapolis,IN 46204	Dir of HR & Fac 40.000	210,661	109,341	2,308
Susan Johnson 820 Massachusetts Ave Suite 1390 Indianapolis,IN 46204	Dir Op & Grant Admin 40.000	207,522	84,729	2,308
Thomas Major 820 Massachusetts Ave Suite 1390 Indianapolis,IN 46204	Assoc Gen Counsel 40.000	204,137	51,223	3,372
Total number of other employees paid over $50,000. . . . . ▶				48

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	2,692,962
Shiel Sexton Company Inc 902 N Capitol Ave Indianapolis,IN 46204	Consutruction Contractor for new office location	1,343,728
HCM Strategists LLC 501 Congress Ave Suite 257 Austin,TX 78701	Support Lumina's state policy agenda	1,288,587
Kite Washington LLC 30 S MERIDIAN ST 1100 Indianapolis,IN 46204	Rental property manager	589,437
Moser Consulting Inc 6220 Castleway Drive Indianapolis,IN 46250	Information Technology/Helpdesk Services	542,321

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 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 POSTSECONDARY EDUCATION.	11,039,664
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.	2,934,288
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.	1,186,454
4 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, AND THE ARNOLT CENTER FOR INVESTIGATIVE JOURNALISM AT INDIANA UNIVERSITY.	883,954

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 The Reinvestment Fund, Inc: PRI loan to address the level of philanthropic, government, and other financial support to HBCUs.	1,000,000
2 Savi Solutions: Early stage company that has financial technology which makes it easier to navigate the complex landscape of student loan forgiveness and repayment.	500,000
All other program-related investments. See instructions. **3**	
Total. Add lines 1 through 3 . . . . . ▶	1,500,000

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	1,365,955,472
b	Average of monthly cash balances		1b	17,216,123
c	Fair market value of all other assets (see instructions)		1c	7,667,854
d	**Total** (add lines 1a, b, and c)		1d	1,390,839,449
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	1,390,839,449
4	Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions)		4	20,862,592
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3		5	1,369,976,857
6	**Minimum investment return.** Enter 5% (0.05) of line 5		6	68,498,843

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	68,498,843
2a	Tax on investment income for 2022 from Part V, line 5	2a 523,153		
b	Income tax for 2022. (This does not include the tax from Part V.)	2b		
c	Add lines 2a and 2b		2c	523,153
3	Distributable amount before adjustments. Subtract line 2c from line 1		3	67,975,690
4	Recoveries of amounts treated as qualifying distributions		4	1,386,815
5	Add lines 3 and 4		5	69,362,505
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	69,362,505

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	86,680,696
b	Program-related investments—total from Part VIII-B		1b	1,500,000
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes		2	1,684,846
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	89,865,542

Part XII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2022	(c) 2022	(d) 2023
1 Distributable amount for 2023 from Part X, line 7				69,362,505
2 Undistributed income, if any, as of the end of 2022:				
a Enter amount for 2022 only			0	
b Total for prior years: 2021, 2020, 2019		0		
3 Excess distributions carryover, if any, to 2022:				
a From 2018 (21,044,755)				
b From 2019 (30,158,428)				
c From 2020 (10,587,827)				
d From 2021 (10,381,849)				
e From 2022 (0)				
f **Total** of lines 3a through e	72,172,859			
4 Qualifying distributions for 2023 from Part XI, line 4: ▶ $ 89,865,542				
a Applied to 2022, 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 2023 distributable amount				69,362,505
e Remaining amount distributed out of corpus	20,503,037			
5 Excess distributions carryover applied to 2023. *(If an amount appears in column (d), the same amount must be shown in column (a).)*				0
6 **Enter the net total of each column as indicated below:**				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	92,675,896			
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 2022. Subtract line 4a from line 2a. Taxable amount—see instructions			0	
f Undistributed income for 2023. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2024				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 2018 not applied on line 5 or line 7 (see instructions)	21,044,755			
9 **Excess distributions carryover to 2024.** Subtract lines 7 and 8 from line 6a	71,631,141			
10 Analysis of line 9:				
a Excess from 2019 (30,158,428)				
b Excess from 2020 (10,587,827)				
c Excess from 2021 (10,381,849)				
d Excess from 2022 (0)				
e Excess from 2023 (20,503,037)				

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 2023, 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) 2023	**(b)** 2022	**(c)** 2021	**(d)** 2020	
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

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 XV 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.	2,300,133
Georgetown University 37th O Streets Northwest Box 571168 Washington, DC 20057		PC	To examine attainment challenges to meet the needs of the modern workforce.	2,000,000
National Skills Coalition 1250 Connecticut Avenue Northwest Suite 200 Washington, DC 20036		PC	To mobilize a diverse set of cross-sector teams from 15-20 states committed to expanding equitable access to and completion of quality non-degree credentials.	1,200,000
National Student Clearinghouse Research Center 2300 Dulles Station Boulevard Suit Herndon, DC 20036		PC	To produce 2024 & 2025 SCNC reports and add race/ethnicity to the 2024 & 2025 Undergraduate Degree Earners report.	1,007,500
Ithaka SR One Liberty Plaza 165 Broadway 5th Floor New York, NY 10004		PC	To support scaling of stranded credit clearinghouse	1,000,000
Louisiana Community and Technical College System Foundation 265 South Foster Drive Baton Rouge, LA 70801		PC	To improve the brand-building efforts of the 12 colleges in the Louisiana Community and Technical College System to support enrollment of adult learners.	1,000,000
Association of Chamber of Commerce Executives Foundation 1330 Braddock Place Suite 300 Alexandria, VA 22202		PC	To support 10-12 new communities to drive growth of credentialing and degree programs in their regions.	994,000
Hechinger Report The 525 W 120th Street Box 127 New York, NY 10004		PC	To support in-depth national coverage on improving educational opportunities beyond high school.	850,000
US Chamber of Commerce Foundation 1615 H Street Northwest Washington, DC 20005		PC	To continue developing and implementing resources to states and community college partners for application of the Talent Pipeline Management framework.	835,000
Foundation for California Community Colleges 1102 Q Street Suite 4800 Sacramento, CA 95811		PC	To strengthen the three selected High Road Construction Careers partnership models between the State Building Trades, California Workforce Development Board, and other community organizations.	800,000
Higher Learning Advocates 1201 Connecticut Ave NW Suite 651 Washington, DC 20036		PC	To support the organization's operations, strategic redevelopment, organizational planning, and responsive capacity changes.	750,000
National Fund for Workforce Solutions 1250 Connecticut Ave NW suite 200 Washington, DC 20036		PC	To drive coordinated policy and practice changes across workplaces, workforce, and postsecondary education systems to ensure that race does not dictate employment outcomes.	700,000
New America Foundation 740 15th Street Northwest Suite 90 Washington, DC 20005		PC	To support a cohort of community colleges in strengthen, modernize, and update business models to enhance workforce development offerings.	700,000
University of Pittsburgh Office of Sponsored Programs Admini 300 Murdoch One Bldg Pittsburgh, PA 15260		PC	To support the implementation of the REACH Deeper college cohort	698,500
American Institutes for Research 1400 Crystal Drive 10th Floor Arlington, VA 22202		PC	To research institutional change efforts that support adult learner participation	675,000
Century Foundation Inc The One Whitehall Street 15th Floor New York, NY 10004		PC	To expand the current Industry and Inclusion cohort to serve three community college systems in geographic regions that have large federal investments through the Build Back Better and Good Jobs Challenge programs.	650,000
Education Writers Association 1825 K Street NW Suite 200 Washington, DC 20006		PC	To support training for journalists that fosters informed, in-depth coverage of higher education and workforce training issues.	650,000
New America Foundation 740 15th Street Northwest Suite 90 Washington, DC 20005		PC	To support research, policy analysis, and nonpartisan advocacy that advances federal policies that support today's students	650,000
Century Foundation Inc The One Whitehall Street 15th Floor New York, NY 10004		PC	To support research, policy analysis, and nonpartisan advocacy that advances federal policies that support today's students.	625,000
Research Foundation of State University of New York PO Box 9 Albany, NY 122010009		PC	To support the implementation of Strategic Enrollment Management plans at SUNY Community Colleges.	613,000
American University 4400 Massachusetts Avenue NW Washington, DC 200168033		PC	To support expansion and use of a toolkit for higher education to respond to rising anti-democratic attitudes and beliefs.	600,000
Behavioral Ideas Lab Inc 80 Broad Street 30th Floor New York, NY 10004		PC	To transform admissions processes using behavioral science to increase adult enrollment in BA programs	600,000
Education Trust Inc The 1501 K Street NW Suite 200 Washington, DC 20005		PC	To support Ed Trust's capacity to engage with state and federal policymakers to preserve and advance equity in higher education policy	600,000
Foundation for California Community Colleges 1102 Q Street Suite 4800 Sacramento, CA 95811		PC	To support participation through the continuation of the strategic enrollment management work with an emphasis on implementation.	600,000
Foundation for California Community Colleges 1102 Q Street Suite 4800 Sacramento, CA 95811		PC	To support the California Community College System's deeper participation in the REACH Collaborative.	600,000
State Higher Education Executive Officers 3035 Center Green Drive Suite 100 Boulder, CO 80301		PC	To promote improved student mental health through state/system policy recommendations.	600,000
Research Foundation of State University of New York PO Box 9 Albany, NY 122010009		PC	To support the New York Student Success Center's deeper participation in the REACH Collaborative.	595,000
American Association of State Colleges and Universities 1717 Rhode Island Ave NW Suite 700 Washington, DC 20036		PC	To prepare higher education leaders to create the conditions for an inclusive, equitable, and just democracy.	575,000
Colorado Community College System Foundation The 9101 E Lowry Boulevard Denver, CO 80230		PC	To support the Colorado Community College System's deeper participation in the REACH Collaborative.	565,000
Corporation for a Skilled Workforce PO Box 17 Hartland, MI 48353		PC	To extend and expand the ACE-UP community of practice.	550,000
Institute for College Access and Success The 1300 Clay Street Suite 1020 Oakland, CA 94612		PC	To support research, policy analysis, and nonpartisan advocacy that advances federal policies that support today's students.	550,000
University of Texas System The 210 W 7th Street Austin, TX 78701		PC	To further advance the University of Texas System's Equitable Student Pathways Project.	550,000
American Association of Colleges and Universities 1818 R Street Northwest Washington, DC 20009		PC	To develop campus models connecting curricula to career preparation.	507,000
Campaign for College Opportunity 1149 South Hill Street Suite 925 Los Angeles, CA 90015		PC	To support the Campaign for College Opportunity's state policy efforts and affirmative action research	500,000
Free Press Indiana Inc 805 N Audubon Rd Indianapolis, IN 46219		PC	To support collaboration among news outlets in Indiana through editorial partnerships and coordinated coverage.	500,000
MDRC 200 Vesey Street 23rd Floor New York, NY 10281		PC	To conduct research on promising programs and policies that community college are implementing for part-time students	500,000
North Carolina Community Colleges System Office 200 W Jones Street Raleigh, NC 27603		PC	To support the North Carolina Community College System's deeper participation in the REACH Collaborative.	500,000
Roadtrip Nation 1626 Placentia Avenue Costa Mesa, CA 92627		PC	To support a roadtrip documentary following Black male students exploring options for learning beyond high school.	500,000
San Diego State University Research Foundation 5250 Campanile Drive San Diego, CA 921821931		SO III FI	To support the National Consortium on College Men of Color (NCCMC).	500,000
Texas Community College Education Initiative 1304 San Antonio St Ste 201 Austin, TX 787011686		PC	To support the Texas Success Center's deeper participation in the REACH Collaborative.	500,000
Virginia Community College System 300 Arboretum Place Suite 200 Richmond, VA 23236		PC	To support the Virginia Community College System's deeper participation in the REACH Collaborative.	500,000
Complete College America 350 Massachusetts Ave Suite 300 Indianapolis, IN 46204		PC	To conduct research on colleges closing equity gaps between adult learners of color and their peers.	495,000
Rutgers The State University of New Jersey Office of Research and Sponsored Pr 57 US Highway 1 New Brunswick, NJ 089018554		PC	To research student perspectives on community college noncredit programs	486,000
PEN America 588 Broadway Suite 303 New York, NY 10012		PC	To defend against educational censorship and uplift the first principles of democracy.	484,000
Washington University 1 Brookings Drive St Louis, MO 631304899		PC	To research credential quality and equity implications.	474,200
Second Nature Inc 160 Alewife Brook Parkway 1182 Cambridge, MA 02138		PC	To drive equitable, holistic climate solutions across institution types and assets.	447,808
Center for American Progress 1333 H Street Northwest Suite 100E Washington, DC 20005		PC	To support research, policy analysis and nonpartisan advocacy in support of efforts to increase equitable distribution of funding and accountability in higher education.	425,000
Candid PO Box 22799 New York, NY 100872799		PC	To provide operational support in the programmatic expansion of Candid and Demographics via Candid.	400,000
Jobs to Move America 525 South Hewitt Street Los Angeles, CA 90013		PC	To empower workers, communities, and community colleges in Alabama to provide pre-apprenticeship coursework around careers in the green industrial economy.	400,000
Postsecondary National Policy Institute 1828 L Street NW Suite 300-E c/o New Venture Fund Washington, DC 20036		SO I	To support non-partisan efforts to provide professional development on higher education policy to Congressional staff and policymakers.	400,000
Young Invincibles 1025 Connecticut Avenue NW Suite Washington, DC 200365405		PC	To elevate student voices in federal and state higher education policy pertaining to college affordability and basic needs.	400,000
National Association of Student Personnel Administrators 111K Street Northeast 10th Floor Washington, DC 200024409		PC	To expand and support NASPA's Advising Success Network.	396,750
Campus Compact 89 South Street Suite 103 Boston, MA 02111		PC	To build infrastructure, increase student engagement, and complete a landscape analysis of community college civic/democracy supports.	372,500
Regents of the University of Michigan 3003 S State Street Ann Arbor, MI 481091274		PC	To understand the paths noncredit students take by leveraging administrative data for 5 states.	370,000
Multiplier 548 Market St PMB 81178 San Francisco, CA 94101		PC	To scale Climate Wayfinding leveraging higher education.	365,000
EdSource 436 14th Street Suite 310 Oakland, CA 94612		PC	To support coverage of higher education issues in California.	350,000
James B Hunt Jr Institute for Educational Leadership and Policy Foundatio 4000 Centregreen Way Suite 301 Cary, NC 27513		PC	To support the Hunt Institute in creating meaningful platforms to engage policymakers	350,000
Jobs for the Future Inc 50 Milk Street Floor 17 Boston, MA 02109		PC	To support non-partisan efforts to provide professional development on workforce and higher education policy to Congressional staff, executive branch staff, and policymakers	350,000
New America Foundation 740 15th Street Northwest Suite 90 Washington, DC 20005		PC	To build capacity to reimagine the American narrative and to bring inclusive wellbeing frameworks into policy conversations	350,000
State Higher Education Executive Officers 3035 Center Green Drive Suite 100 Boulder, CO 80301		PC	To support state higher education funding formula equity audits and national conferences.	350,000
Temple University - of The Commonwealth System of Higher Education 1805 N Broad Street Philadelphia, PA 191226104		PC	To support the Hope Center's policy efforts around meeting the basic needs of students.	350,000
The Conversation US Inc 303 Wyman Street Suite 300 Waltham, MA 02451		PC	To support higher education researchers sharing their expertise on postsecondary access, attainment, and affordability with mainstream audiences.	350,000
Volcker Alliance Inc 39 Broadway Suite 1930 New York, NY 10006		PC	To strengthen the Next Generation Service Corps national network and prepare for an impact evaluation.	350,000
Aspen Institute The 2300 N Street NW Suite 700 Washington, DC 20037		PC	To launch a new task force on higher education and climate action	340,000
Urban Institute The 500 LEnfant Plaza SW Washington, DC 20024		PC	To support four-year institutions in collecting student parent data to improve and inform policy and practice.	330,000
Minnesota Humanities Center 987 Ivy Avenue East St Paul, MN 55106		PC	To support institutions in Indiana and nationally implement a new curricular intervention that promotes civic agency.	300,000
National Association for College Admission Counseling 1050 North Highland Street Suite 4 Arlington, VA 22201		PC	To design NACAC's Center for Reimagining College Access	300,000
National Conference of State Legislatures 7700 East First Place Denver, CO 802307143		NC	To advance Lumina's public policy priorities among state legislators.	300,000
Open Campus Media Inc One Thomas Circle NW 700 Washington, DC 20005		PC	To support in-depth coverage of race and equity in higher education, and higher education coverage in Indiana.	275,000
American Council on Education One Dupont Circle NW Suite 800 Washington, DC 200361193		PC	To generate a series of data products designed to identify potential leavers for public policy solutions and institutional strategies.	250,000
Campus Compact 89 South Street Suite 103 Boston, MA 02111		PC	To implement the College Renaissance Corps in partnership with community college systems.	250,000
Century Foundation Inc The One Whitehall Street 15th Floor New York, NY 10004		PC	To support the third cohort of Next100 policy entrepreneurs and apply research on inclusive policymaking with partner organizations.	250,000
Council for Opportunity in Education 1025 Vermont Ave NW Suite 400 Washington, DC 20005		PC	To conduct research with Black, Hispanic, and Indigenous learners on the value of postsecondary education.	250,000
Higher Learning Commission 230 South LaSalle Street Suite 7-5 Chicago, IL 60604		PC	To create a new business model focused on short-term credentials that include and expand beyond traditional programs and degrees.	250,000
NALEO Educational Fund 1122 West Washington Boulevard Thi Los Angeles, CA 90015		PC	To support NALEO Education Fund's policymaker education and professional development on talent development and racial equity for Latino elected/appointed officials	250,000
Pennsylvania State University 110 Technology Center Building University Park, PA 16802		PC	Supporting academic policy research leading to more equitable higher education funding policies.	250,000
Texas Tribune The 919 Congress Avenue 6th Floor Austin, TX 78701		PC	To support in-depth, student-centered reporting on postsecondary pathways in Texas.	250,000
Urban Institute The 500 LEnfant Plaza SW Washington, DC 20024		PC	To align new and existing trend data across multiple federal entities and produce analyses using the data	250,000
Texas Community College Education Initiative 1304 San Antonio St Ste 201 Austin, TX 787011686		PC	To support the Texas Association of Community Colleges (TACC) to provide technical assistance to implement the new community college funding formula.	225,000
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
Amalgamated Foundation 1825 K Street NW Washington, DC 20006		PC	To address philanthropy's historical practices through a transparent, self-critical process.	200,000
Institute for Higher Education Policy 1615 L Street NW Suite 310 Washington, DC 20036		PC	To examine higher education's role and activating policy change to narrow the racial wealth gap	200,000
Massachusetts Alliance for Early College Inc 588 Boston Post Road Suite 150 Weston, MA 02493		PC	To facilitate cross-site learning and faculty professional development for Massachusetts's equity-minded early college programs	200,000
Phi Theta Kappa Foundation 1625 Eastover Drive Jackson, MS 39211		PC	To improve the way colleges promote community college enrollment and attendance.	200,000
Seattle Foundation The 1601 Fifth Avenue Suite 1900 Seattle, WA 981013615		PC	To support the Equitable Evaluation Initiative.	200,000
Southern Education Foundation Inc 101 Marietta Street NW Suite 1650 Atlanta, GA 30303		PC	To explore how greater K12 integration may support higher education access, diversity, and completion	200,000
State of Idaho Board of Education 650 W State Street PO 83720 Boise, ID 837200037		PC	To expand Idaho's direct admissions program and create a regional multi-state direct admissions compact	200,000
Urban Institute The 500 LEnfant Plaza SW Washington, DC 20024		PC	To expand data collection activities and support with the ACE-UP community colleges cohort.	200,000
Veterans Education Success 1501 K Street NW Suite 200 Washington, DC 20005		PC	To support engagement with Department of Education negotiated rulemaking.	200,000
Bipartisan Policy Center Inc 1225 Eye Street NW Suite 1000 Washington, DC 20005		PC	To develop and advance policy solutions designed to improve college completion and college affordability	195,000
University of Notre Dame Finance Office1100 Grace Hall Notre Dame, IN 465565612		PC	To support the Wilson Sheehan Lab for Economic Opportunities (LEO).	190,000
Arizona State University Foundation for A New American University PO Box 2260 300 East University Dri Tempe, AZ 852802260		PC	To provide operational support to the Academy for Innovative Higher Education Leadership.	185,000
Rutgers The State University of New Jersey Office of Research and Sponsored Pr 57 US Highway 1 New Brunswick, NJ 089018554		PC	To serve as the central hub to disseminate data and research on noncredit education.	185,000
Rockefeller Philanthropy Advisors Inc 90 Church Street Floor 1 7082 New York, NY 10008		PC	To enhance the design of college promise programs to foster greater effectiveness and success outcomes	180,000
Minnesota Office of Higher Education 1450 Energy Park DriveSuite 350 St Paul, MN 55108		NC	To expand Minnesota's direct admissions program and develop a standardized financial aid letter	170,000
New York University (Marron Institute) 370 Jay Street 12th Floor Brooklyn, NY 11201		PC	To support a book on the crumbling American promise to provide college opportunity for all.	155,000
Bismarck State College 1500 Edwards Ave Bismarck, ND 58501		PC	To support community colleges in improving their capacity to engage and enroll potential students through enhanced digital presence, mobile design and accessibility.	150,000
Blackhawk Technical College 6004 S County Road G PO Box 5009 Janesville, WI 535475009		PC	To support community colleges in improving their capacity to engage and enroll potential students through enhanced digital presence, mobile design and accessibility.	150,000
Central Wyoming College Foundation 2660 Peck Avenue Riverton, WY 82501		PC	To support community colleges in improving their capacity to engage and enroll potential students through enhanced digital presence, mobile design and accessibility.	150,000
College of Eastern Idaho 1600 South 25th East Idaho Falls, ID 83404		PC	To support marketing and brand-building efforts around increased enrollment of adult learners.	150,000
Community College of Rhode Island Foundation 1762 Louisquisset Pike Lincoln, RI 02865		PC	To support brand-building efforts through the built environment to increase the engagement and enrollment of adult learners.	150,000
County College of Morris Foundation 214 Center Grove Road Randolph, NJ 07869		PC	To support marketing and brand-building efforts around the increased enrollment of adult learners.	150,000
Great Falls College - Montana State University 2100 16th Avenue South Great Falls, MT 59405		PC	To support marketing, brand-building, and digital access efforts and ultimately increase enrollment of adult learners.	150,000
Institute for Citizens and Scholars The 104 Carnegie Center Suite 301 Princeton, NJ 08540		PC	To support the Citizen Preparation Assessment Working Group.	150,000
Iowa Lakes Community College 19 South 7th Street Estherville, IA 51334		PC	To support community colleges in improving their capacity to engage and enroll potential students through enhanced digital presence, mobile design and accessibility.	150,000
Madison Area Technical College 1701 Wright Street Madison, WI 53704		PC	To improve knowledge and develop sustainable strategies to implement data informed adult student enrollment efforts.	150,000
Northwest-Shoals Community College 800 George Wallace Blvd Muscle Shoals, AL 35661		PC	To support marketing and brand-building efforts to ultimately increase enrollment of adult learners.	150,000
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
Regents of the University of California - Los Angeles 10920 Wilshire Blvd Suite 500 Los Angeles, CA 90024		PC	To build a repository of data and evidence for interventions to support mental health in student populations.	150,000
Reporters Committee for Freedom of the Press 1156 15th Street Northwest 1020 Washington, DC 20005		PC	To support the newsgathering rights of journalists and news organizations in Indiana through legal resources and training.	150,000
South Piedmont Community College Foundation Inc 680 Highway 74 West Polkton, NC 28135		PC	To support community colleges in improving their capacity to engage and enroll potential students through enhanced digital presence, mobile design and accessibility.	150,000
Student Organizing Inc 44 Winter StreetFloor 4 Boston, MA 02108		PC	To support Student PIRGs' training, education, and federal advocacy efforts.	150,000
Vassar College 124 Raymond Avenue Box 12 Poughkeepsie, NY 12604		PC	To identify and conduct research on positive deviants in four-year institutions	125,000
Loyola University of Chicago 820 North Michigan Avenue Lewis Tow Chicago, IL 60611		PC	To support a study on faculty and student perspectives on the intersections of equity, student success, and democratic engagement.	120,000
America Achieves Inc 244 Fifth Avenue Suite F71 New York, NY 10001		PC	To provide general operating support to America Achieves.	110,000
Indiana Town Halls Inc 207 Buckingham Drive Indianapolis, IN 462083625		PC	To support a nonpartisan platform for civic engagement in democracy through interactive dialogue.	110,000
Association of Governing Boards of Universities and Colleges 1133 20th Street NorthwestSuite 30 Washington, DC 20036		PC	To support the work of the AGB Higher Education as a Strategic Asset Council.	100,000
CareerVillage Inc 1475 Columbia Ct Palo Alto, CA 94304		PC	To provide operational support for the CareerVillage, Inc. online community.	100,000
Center for Effective Philanthropy The 675 Massachusetts Ave Eleventh Flo Cambridge, MA 02139		PC	To provide operational support to the Center for Effective Philanthropy.	100,000
Child Advocates 8200 Haverstick RoadSuite 240 Indianapolis, IN 46240		PC	To cover additional film production costs for "Old White Man Gets Woke."	100,000
Clackamas Community College 19600 Molalla Avenue Oregon City, OR 970457998		PC	To continue to support website redesign efforts in support of adult student participation.	100,000
Colorado Succeeds 730 17th St Suite 950 Denver, CO 80202		PC	To support Colorado Succeeds' talent development policy research and advocacy efforts	100,000
Complete College America 350 Massachusetts Ave Suite 300 Indianapolis, IN 46204		PC	To support the creation of a stock photo archive that illustrates today's college students.	100,000
Education Reform Now Inc 276 5th Avenue Suite 704 915 New York, NY 10001		PC	To conduct research and disseminate reports aimed at federal and state policy that responds to the SCOTUS decision.	100,000
Excelencia in Education Inc 1156 15th Street NW Suite 1001 Washington, DC 20005		PC	To support Excelencia in Education's Celebracion de Excelencia and National Policy Forum	100,000
Fond du Lac Tribal and Community College 2101 14th Street Cloquet, MN 55720		PC	To improve participation through college website optimization.	100,000
Indian Hills Community College 525 Grandview Ave Ottumwa, IA 52501		PC	To continue to support website redesign efforts in support of adult student participation.	100,000
Linn-Benton Community College Foundation 6500 Pacific Blvd SW Albany, OR 97321		PC	To support website redesign efforts in support of adult student participation.	100,000
Minnesota State Colleges and Universities 30 East 7th Street Suite 350 St Paul, MN 55101		PC	To support participation through the continuation of the strategic enrollment management work with an emphasis on implementation.	100,000
National League of Cities Institute 660 North Capitol Street NW Washington, DC 20002		PC	To support the National League of Cities in the implementation of the Good Jobs, Great Cities project.	100,000
New Venture Fund 1201 Connecticut Avenue NW Suite Washington, DC 20036		PC	To support the U.S Impact Investing Alliance.	100,000
Northwestern Michigan College Foundation 1701 E Front Street Traverse City, MI 49686		PC	To update the Northwestern Michigan College (NMC) brand to improve the prospective student's initial encounter with NMC.	100,000
Oconee Fall Line Technical College 1189 Deepstep Rd Sandersville, GA 31082		PC	To support website and campus navigation improvements in support of adult student participation.	100,000
Rockefeller Philanthropy Advisors Inc 90 Church Street Floor 1 7082 New York, NY 10008		PC	To support a strong pathways field	100,000
Roosevelt Institute The 570 Lexington Avenue 5th Floor New York, NY 10022		PC	To convene a working session to elevate the education and training needs to implement federal industrial policy	100,000
University of Virginia 914 Emmet StreetBox 400195 Charlottesville, VA 229034829		PC	To support a meeting of higher education leaders, democracy movement representatives, and philanthropic leaders during Democracy 360	100,000
Western Interstate Commission for Higher Education 3035 Center Green Drive Suite 200 Boulder, CO 803012204		PC	to support a mental health policy roundtable for WICHE member states.	100,000
Western Nevada College Foundation 2201 West College Parkway Carson City, NV 89703		PC	To support website redesign and digital information access efforts in support of adult student participation	100,000
National Association of College and University Attorneys 1 Dupont Circle NW Suite 620 Washington, DC 20036		PC	To support the development of the Leadership Development Institute pilot	99,000
New America Foundation 740 15th Street Northwest Suite 90 Washington, DC 20005		PC	To support events and trainings across the country to illuminate how democracy and climate are intertwined	99,000
Michigan Department of Labor and Economic Opportunity 2501 Woodlake Circle Okemos, MI 48864		PC	To continue the growth and implementation of the Talent Pipeline Management framework in Michigan.	95,000
Council for Opportunity in Education 1025 Vermont Ave NW Suite 400 Washington, DC 20005		PC	To pilot the inaugural undergraduate National Student Leadership Congress	90,000
United Nations Educational Scientific and Cultural Organization 7 Place de Fontenoy Paris SP FR		GOV	Support the collection of best practices across the globe to combat discrimination in tertiary education and share the learnings at a global launch event.	90,000
Colorado State University 6003 Campus Delivery 555 S Howes Street Fort Collins, CO 805236003		PC	To support the national conference for the Association of Undergraduate Education at Research Universities and the HBCU Student Success Pre-Conference.	85,000
GSV Summit LLC 875 North Michigan Avenue Suite 352 Chicago, IL 60611		PC	To support the 2024 ASU-GSV Summit.	80,000
Sagamore Institute Inc 1630 North Meridian StreetSuite 450 Indianapolis, IN 46202		PC	To support the Workforce 2040: Pathways to Prosperity project.	75,000
Brookings Institution The 1775 Massachusetts Ave NW Washington, DC 200362188		PC	To host a public event to launch a nationwide indicator of vulnerability to misinformation	70,000
Regents of the University of California - Irvine Office of Research 160 Aldrich Hall Irvine, CA 926977600		PC	To support a pilot institute to explore strategies to advance the mission of higher education in nationally and locally politically polarized environments	60,300
American Association of Colleges and Universities 1818 R Street Northwest Washington, DC 20009		PC	To support the evaluation efforts of Truth, Racial Healing, and Transformation Campus Centers	50,000
Community Learning Partnerships Inc 710 Canyon Oaks Drive Unit G Oakland, CA 94605		PC	To support a national convening for 10 states with interest in adopting the California Youth Leadership Corps model	50,000
Philanthropy for Active Civic Engagement 611 Pennsylvania Ave SE 372 Washington, DC 20003		PC	To support the release of the updated Civic Language Perceptions Project. Events are yet to be determined, but the previous release involved a half-dozen webinars and related materials.	50,000
Public Policy Institute of California 500 Washington Street Suite 600 San Francisco, CA 94111		PC	To support PPIC's research on higher education finance in California.	50,000
Urban Institute The 500 LEnfant Plaza SW Washington, DC 20024		PC	To support a Post SCOTUS Affirmative Action Decision Convening hosted by the Urban Institute.	50,000
Campus Compact 89 South Street Suite 103 Boston, MA 02111		PC	To support community college participation and leadership at Compact24	40,000
Organisation for Economic Cooperation and Development 2 rue Andre-Pascal F Paris Cedix FR		GOV	To support a convening on the role of colleges in regional SDG efforts	40,000
United Way of Central Indiana 2955 N Meridian Street Suite 300 Indianapolis, IN 46208		PC	To support the 2022 United Way Campaign.	30,429
Association of Research Libraries 21 Dupont Circle NW Suite 800 Washington, DC 20036		PC	To support the inaugural Executive Institute of the Association of Research Libraries, "Research Libraries Navigating Challenges to Free Expression, Academic Freedom, and Inclusion."	30,000
Hope Chicago 303 East Wacker Drive Suite 360 Chicago, IL 60601		PC	To provide program support.	28,000
America's Promise 1110 Vermont Avenue NorthwestSuite Washington, DC 20005		PC	To support the convening to develop America's Promise Alliance 2024 research agenda.	25,000
CAPACES Leadership Institute 356 Young Street Woodburn, OR 97071		PC	Part of the TA Fund	25,000
Child Advocates 8200 Haverstick RoadSuite 240 Indianapolis, IN 46240		PC	To support the Interrupting Racism for Children Youth Workshops.	25,000
Columbus Learning Center Management Corporation 4555 Central Avenue Suite 2100 Columbus, IN 47203		SO I	To support the CivicLab - Talent Hubs 2023 Annual Convening	25,000
Complete College America 350 Massachusetts Ave Suite 300 Indianapolis, IN 46204		PC	To support the Women of Color Leadership Summit	25,000
Complete College America 350 Massachusetts Ave Suite 300 Indianapolis, IN 46204		PC	To support the Complete College America 2023 Annual Convening.	25,000
GEORGIA PARTNERSHIP FOR EXCELLENCE IN EDUCATION INC 270 Peachtree Street NW Atlanta, GA 30303		PC	This Grant will support the Black Learner Success Community Conversation Summit which will be developing community-based strategies to address the decline in Black enrollment in postsecondary, vocational, and career pathways in Georgia. The convening will bring together key stakeholders from community-based organizations, Historically Black Colleges and Universities, businesses, and policymakers from across Georgia to address the issue of barriers to college and career access in the state. This is the first opportunity for a state to amplify the work of HCM Strategists, LEVEL UP and Get REAL: Leveraging Explicit Value for Every Black Learner, Unapologetically and share the case-making document and national call to action.	25,000
Louisiana Board of Regents PO Box 3677 Baton Rouge, LA 70821		GOV	Sponsoring the inaugural Louisiana Meauxmentum Summit, Baton Rouge, LA.	25,000
Missouri College and Career Attainment Network 555 Vandiver Drive Columbia, MO 65202		PC	As part of the Technical Assistance Fund.	25,000
Missouri Department of Higher Education & Workforce Development 301 W High Street Suite 860 Jefferson City, MO 65101		GOV	The state public financing model has not been restructured since the early 1990s. The state legislature asked for a study to identify and propose a new student-centered model with performance metrics for the institutions, reflecting goals connected to state workforce, economic, and community needs. Funds will help support this study.	25,000
PA Association for College Admission Counseling PO Box 859 Enola, PA 17025		PC	To provide Technical Assistance to Pennsylvania aligned with Lumina's public policy priorities.	25,000
Public Education Forum of Mississippi Inc PO Box 23276 Jackson, MS 39225		PC	Support for a postsecondary enrollment marketing campaign targeting African American students in Mississippi.	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
Steve Fund The PO Box 9070 Providence, RI 02940		PC	To support a convening regarding post-Affirmative action and student well being	25,000
National Association Of State Directors Of CTE Consortium 8484 Georgia Ave Suite 620 Silver Springs, MD 20910		PC	To create a network scan of states' lists of credentials eligible for federal funding and develop a database of "credentials of value."	25,000
United States Department of Education 400 Maryland Avenue SouthwestRoom 7 Washington, DC 20202		PC	To support the National Summit on Equal Opportunity in Higher Education.	25,000
Alamo Community College District Foundation 201 West Sheridan San Antonio, TX 482041429		PC	To support the 30th Anniversary Celebration at the 2024 Community College Futures Assembly	20,000
American Association Of Blacks in Higher Education 1155 F St NW Washington, DC 20004		PC	To support the 2023 AABHE Annual Conference.	20,000
American Association of Colleges for Teacher Education 1602 L Street NW - Suite 601 Washington, DC 20036		PC	To support keynote for AACTE's 2023 annual meeting in Indianapolis	20,000
Community-Engaged Alliance 777 Indiana Ave Indianapolis, IN 46202		PC	To support the 2023 Summit and Research Symposium	20,000
Concordia Summit Inc 134 E 40th Street Floor 5 New York, NY 10016		PC	Annual membership to Concordia's annual and regional summits.	20,000
GSV Summit LLC 875 North Michigan Avenue Suite 352 Chicago, IL 60611		PC	To support the 2023 ASU-GSV Summit.	20,000
Myfuturenc Inc 301 N WILMINGTON ST Raleigh, NC 27601		PC	To support myFutureNC's inaugural financial aid summit for practitioners	20,000
Scholarship America 1550 American Boulevard EastSuite 1 Minneapolis, MN 554251197		PC	To discuss critical issues in the private scholarship space, foster collaboration, and share Scholarship America's vision for an equity and data-driven future	20,000
Indianapolis Public Schools Education Foundation Inc 120 East Walnut Street Room 104B Indianapolis, IN 46204		PC	To support the IPS All-City Band Band Camp	18,700
Association for Institutional Research 2241 North Monroe St PMB 1413 Tallahassee, FL 32303		PC	To support the world's largest gathering of higher education professionals working in institutional research, effectiveness, assessment, and planning.	16,000
Alamo Community College District Foundation 201 West Sheridan San Antonio, TX 482041429		PC	To support the annual Community College Futures Assembly	15,000
Indiana Black Expo 601 N Shortridge Rd Indianapolis, IN 46219		PC	To support IBE 2023 Summer Celebration.	15,000
Indiana Latino Expo Inc 1113 E 86th St 111 Indianapolis, IN 46240		PC	To provide general support for 2023 ILE events.	15,000
Indiana Latino Institute Inc 2126 N Meridian Street Suite 100 Indianapolis, IN 46202		PC	To support the 2023 ILI Education Summit	15,000
Indiana University Lilly Family School of Philanthropy 301 University BoulevardUniversity Indianapolis, IN 46202		PC	To support the Opportunity and Innovation in Higher Education Philanthropy Workshop.	15,000
InnoPower Indy Inc 5868 E 71st Suite E-356 Indianapolis, IN 46220		PC	To support the 5th ANNUAL INNOPOWER MINORITY BUSINESS CONFERENCE	15,000
Ivy Tech Foundation 50 West Fall Creek Parkway North Dr Indianapolis, IN 46208		PC	To support the Ivy Tech Community College 60th Anniversary Gala.	15,000
Joint Center for Political and Economic Studies Inc 1090 Vermont Avenue NorthwestSuite Washington, DC 200054928		PC	To support the Joint Center's Future of Black Communities Summit.	15,000
National Conference of State Legislatures 7700 East First Place Denver, CO 802307143		NC	To sponsor NCSL's Legislative Summit 2023.	15,000
TeenWorks Inc 2820 North Meridian St Suite 1250 Indianapolis, IN 46208		SO I	To support TeenWorks' College Prep Boot Camp which provides an opportunity for students to gain the knowledge and skills to be ready for college.	15,000
Texas Higher Education Foundation 1801 Congress Ave Austin, TX 78701		PC	To support the Higher EDge 2023: Leading Texas' Future pre-conference	15,000
Urban Manufacturing Alliance 608 Henry St Brooklyn, NY 11231		PC	To support Urban Manufacturing Alliance's 2023 Baltimore Gathering.	15,000
Minnesota Office of Higher Education 1450 Energy Park DriveSuite 350 St Paul, MN 55108		NC	To meet in-person with national P-20 council leaders that I have connected with. These visits are intended to inform Minnesota's P-20 strategic planning process by providing us with benchmarks about other states' approaches, operations, outcomes, and measures. Ultimately the goal is to inform planning in articulating a clearer philosophical and operational approach for Minnesota's P-20 council.	14,966
Center for Leadership Development 2425 Dr Martin Luther King Jr Str Indianapolis, IN 462085546		PC	To support the 43rd Annual Minority Achievers Awards and Scholarship Gala.	12,500
Accrediting Commission for Community and Junior Colleges 428 J Street 4th Floor Sacramento, CA 95814		PC	2024 ACCJC Partners in Excellence Conference colloquium on best practices in promoting equitable outcomes.	10,000
American Association of Colleges and Universities 1818 R Street Northwest Washington, DC 20009		PC	To support the annual AAC&U Presidents' Trust Symposium	10,000
American Evaluation Association 2001 K Street NW 3rd Floor Ft Washington, MD 20744		PC	To support the 2023 American Evaluation Association conference.	10,000
Asian AmericansPacific Islanders in Philanthropy 2201 Broadway 720 Oakland, CA 94612		PC	To support the 2023 AAPIP Network Convening.	10,000
Association for the Study of Higher Education 4505 S Maryland Parkway Box 45306 Las Vegas, NV 891543068		PC	To support the Association for the Study of Higher Education's annual conference.	10,000
Association of Black Foundation Executives Inc 55 Exchange Place Suite 401 New York, NY 10005		PC	To support the 2023 ABFE Harambee Conference.	10,000
Be Nimble Foundation Inc 520 East Washington Street Indianapolis, IN 46204		PC	To provide general partnership Seed Sponsorship for Black Innovation Week + Garden Pardi.	10,000
CareerVillage Inc 1475 Columbia Ct Palo Alto, CA 94304		PC	To support the development of materials that promote the Let's Talk Series.	10,000
Central Indiana Community Foundation 615 N Alabama St 119 Indianapolis, IN 46204		PC	To support the discussion on "Weathering: The Extraordinary Stress of Ordinary Life in an Unjust Society" by Dr. Arline Geronimus.	10,000
Christian Theological Seminary 1000 West 42nd Street Indianapolis, IN 46208		PC	To support the Faith & Action Fall Event	10,000
Coburn Place Safe Haven II Inc 604 East 38th Street Indianapolis, IN 46205		PC	To provide support through an apartment sponsorship.	10,000
Coleridge Initiative Inc 1740 Broadway 15th Floor New York, NY 10019		PC	To highlight the transformative potential of collaborations between federal and state agencies and researchers that use linked administrative data to produce actionable insights to improve government programs.	10,000
Community Partners 1000 Alameda Street Suite 240 Los Angeles, CA 90012		PC	To support California Competes' higher education policy institutes	10,000
Council for Opportunity in Education 1025 Vermont Ave NW Suite 400 Washington, DC 20005		PC	To support the annual COE conference	10,000
District of Columbia College Access Program 1425 K Street NW Suite 200 Washington, DC 20005		PC	To support the Beating the Odds summit.	10,000
Economic Club of Indiana The 1630 North Meridian Street Indianapolis, IN 46202		PC	To support the 2023-2024 Economic Club luncheon series.	10,000
Five Pearls Foundation PO Box 2271 Indianapolis, IN 46206		PC	To support the Iota Zeta chapter annual Youth Step Down Competition	10,000
Funders Together to End Homelessness Inc 89 South Street Suite 603 Boston, MA 02111		PC	Membership dues for 2023-24 for Workforce Matters Funder Network	10,000
Grantmakers for Education 400 SE 103rd Drive 33348 Portland, OR 97216		PC	To support the 2023 GFE Annual Conference.	10,000
Grantmakers for Effective Organizations 1725 DeSales Street Northwest Sui Washington, DC 200364406		PC	To support the 2023 GEO Learning Conference.	10,000
Hispanics in Philanthropy 414 13th Street Suite 200 Oakland, CA 94612		PC	To support the CHANGE Philanthropy's 2023 Unity Summit.	10,000
Horton's Kids Inc 2233 Hunter Place SE Washington, DC 20020		PC	To support the 15th Annual Home Runs for Horton's Kids.	10,000
Indiana Conference for Women LTD 9245 North Meridian Street Suite 3 Indianapolis, IN 46260		PC	To support the 2023 Indiana Conference for Women.	10,000
Indiana Humanities Council 1500 North Delaware Indianapolis, IN 46202		PC	To support the 2023 National Humanities Conference	10,000
Indiana University Foundation PO Box 500 Bloomington, IN 47402		PC	To support The Arnolt Center for Investigative Journalism's annual symposium	10,000
La Plaza Inc 8902 East 38th Street Indianapolis, IN 46226		PC	To support the Night of the Americas and FIESTA Indianapolis events	10,000
Madam Walker Legacy Center 617 Indiana Avenue Suite 320 Indianapolis, IN 462023173		PC	To support the 2023 MWLC Legacy Fest.	10,000
Martin University 2186 North Sherman Drive Indianapolis, IN 46218		PC	To support the Martin University 2023 Empowering Excellence Gala	10,000
Mass Ave Cultural Arts District 342 Mass Ave Indianapolis, IN 46204		PC	To provide general support to the Mass Ave Cultural Arts District	10,000
Men of Vision Empowering 2427 Ross Common Ct Indianapolis, IN 46229		PC	To support Men of Vision Empowering's activities mentoring young Black males.	10,000
National Association of Student Personnel Administrators 111K Street Northeast 10th Floor Washington, DC 200024409		PC	To support the 2024 NASPA Community Colleges Institute	10,000
One World Education 1800 KENYON ST NW Washington, DC 20010		PC	To support the One World Education Graduation Celebration and Fundraiser	10,000
Phila Hospital and Health Care District 1199C Training and Upgrading Fund 100 South Broad Street 10th Floor Philadelphia, PA 19110		PC	District 1199C Training Fund (Philadelphia, PA), 3rd place winner of Lumina Foundation's Beautiful Minds competition, in partnership with FreeThink.	10,000
Scholarship America 1550 American Boulevard EastSuite 1 Minneapolis, MN 554251197		PC	To support the 2023 An Evening with Scholarship America	10,000
School on Wheels (SOW) 2955 N Meridian Street Suite 250 Indianapolis, IN 46208		PC	To provide support for the Brightlane Learning Education Celebration Speaker	10,000
Southern Regional Education Board 592 Tenth Street Northwest Atlanta, GA 303185790		PC	To support the 2nd annual SREB Student Success Summit.	10,000
Teach Indy Inc 1630 N Meridian Street Suite 450 Indianapolis, IN 46202		PC	To support the 2023 Teach Indy Educators Conference	10,000
The Common Application Inc 3003 Washington Blvd Suite 1000 Arlington, VA 22201		PC	To support 2023 College Signing Day.	10,000
United Philanthropy Forum 1020 19th Street NW Suite 360 Washington, DC 20036		PC	To support the 20th Annual Foundations on the Hill.	10,000
United States Department of Education 400 Maryland Avenue SouthwestRoom Washington, DC 20202		PC	To support the Raise the Bar Data Summit	10,000
UNITE-LA 350 South Bixel Street Suite 160 Los Angeles, CA 90017		PC	Celebrating the Future of Collaboration symposium, marking 25th anniversary of UNITE-LA.	10,000
Research Foundation of CUNY 230 West 41st Street 7th Floor New York, NY 10036		PC	To support the 2024 CUNY Teaching and Learning Conference designed to support, elevate, and recognize faculty teaching excellence.	9,700
Afghan American Community Center Inc 7710 Hackbury Court Unit A Indianapolis, IN 46227		PC	To support a new Indy-area nonprofit assisting Afghan refugees.	7,500
Indiana Bar Foundation 615 North Alabama Suite 426 Indianapolis, IN 46204		PC	To support the Mock Trial Diversity Initiative	7,500
Indianapolis Press Club Foundation Inc PO Box 40923 Indianapolis, IN 462400923		PC	To support the 2023 Thomas R. Keating Competition.	7,500
Madam Walker Legacy Center 617 Indiana Avenue Suite 320 Indianapolis, IN 462023173		PC	To support educational and cultural programming.	7,500
OutCare Health Inc 7050 Wildridge Dr Indianapolis, IN 46256		PC	To support OutCare's LGBTQ+ initiatives.	7,500
United Negro College Fund 3737 North Meridian Street Suite 5 Indianapolis, IN 46208		PC	To support the 2023 UNCF Indy Masked Ball.	7,500
American Association of Community Colleges One Dupont Circle NW Suite 700 Washington, DC 20036		PC	To support the Post-Conference Session: Elevating the Role of Community Colleges in the Semiconductor Ecosystem	6,500
Generation Patient 1962 Dockside Dr Greenwood, IN 46143		PC	To support the 2023 Generation Patient Virtual Health Advocacy Summit	6,000
Lawrence Township School Foundation 6501 Sunnyside Road Indianapolis, IN 46236		PC	To support students competing in the VEX World Robotics Competition	6,000
Cancer Support Community of Central Indiana 5150 West 71st Street Indianapolis, IN 46268		PC	To support the 2023 Laughing Matters fundraiser.	5,500
Foster Success 546 East 17th Street Suite 206 Indianapolis, IN 46202		PC	To support the Breaking Down Barriers event.	5,500
Arts Council of Indianapolis 924 North Pennsylvania Street Indianapolis, IN 46204		PC	To support the 2023 Start with Art event.	5,000
Association of Public and Land-grant Universities 1307 New York Avenue Northwest Su Washington, DC 200054722		PC	Engaging campus leaders to consider how systemic changes can lead to positive and sustainable outcomes in equitable student success, affordability and access.	5,000
Ball State University 2000 W University Avenue Muncie, IN 473061099		PC	To support The Partnership Project, a special edition by the Ball State Daily News.	5,000
Big Brothers Big Sisters of Central Indiana Inc 1433 N Meridian Street Indianapolis, IN 462084715		PC	To support The Main Event 2023.	5,000
Bloomington Pearl Foundation PO Box 1044 Bloomington, IN 47402		PC	To support the 2023 Finer Womanhood Celebration	5,000
Casa Chirilagua 4109 Mount Vernon Ave Alexandria, VA 22305		PC	To support the Local Leaders Program.	5,000
Central Indiana Community Foundation 615 N Alabama St 119 Indianapolis, IN 46204		PC	To support the 2023 Power of Women Event	5,000
Central Indiana Corporate Partnership Foundation 1210 Waterway Blvd Suite 5000 Indianapolis, IN 46202		PC	To support the 2023 Mira Awards.	5,000
Children's Bureau Inc 1575 Dr Martin Luther King Jr Str Indianapolis, IN 46202		PC	To support the 14th Annual Firefly Children & Family Alliance Trivia Night	5,000
Children's Museum of Indianapolis Inc 3000 North Meridian Street Indianapolis, IN 46208		PC	To support 2023 Museum by Moonlight.	5,000
College Mentors for Kids Inc 6081 East 82nd Street Suite 420 Indianapolis, IN 46250		PC	To support the 2023 College Mentors for Kids National Conference	5,000
Collegiate Directions Inc 4827 Rugby Avenue Ste 001 Bethesda, MD 20814		PC	To support the CDI Scholars Annual Benefit.	5,000
Conner Prairie Museum Inc 13400 Allisonville Road Fishers, IN 46038		PC	To support the Conner Prairie Museum Theatre.	5,000
Cornell University School of Industrial and Labor Relations ILR Deans Office 309 Ives Hall Ithaca, NY 14853		PC	To support the ILR Awards Ceremony in honor of Lumina Director, Christy Pambianchi.	5,000
Courageous Conversation Global Foundation 8465 West Sahara STE 111-324 Las Vegas, NV 89117		PC	To support and evening of celebration and conversation.	5,000
DePauw University 313 Locust StreetPO Box 37 Greencastle, IN 461350037		PC	To honor the retirement of Holiday Hart McKiernan.	5,000
El Sistema Indianapolis 4835 N Illinois Street Indianapolis, IN 46208		PC	To support the summer camp of free ensemble music education for underserved students.	5,000
EmployIndy 101 W Washington Street Suite 1200 Indianapolis, IN 46204		PC	To support the 22nd Annual Mayor's Celebration of Diversity.	5,000
Foster Success 546 East 17th Street Suite 206 Indianapolis, IN 46202		PC	To support Foster Success's efforts to assist young adults transition out of foster care.	5,000
Glendale College Foundation 1500 North Verdugo Road Glendale, CA 912082894		PC	To support publication of student-led El Vaquero Newspaper at Glendale Community College	5,000
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.	5,000
Heartland Film Inc 8950 Otis Ave Indianapolis, IN 46216		PC	To support the 2023 Heartland Film Festival	5,000
Indiana Fiscal Policy Institute 601 South Meridian Street Suite 1E Indianapolis, IN 46225		PC	To support the Indiana Fiscal Policy Institute Annual Luncheon	5,000
Indianapolis Downtown Inc 111 Monument Circle Suite 250 Indianapolis, IN 46204		PC	To support the 2023 State of Downtown Indy and 30th Anniversary Celebration	5,000
Indy Reads 40 East Saint Claire Street Indianapolis, IN 46204		PC	To support the Indy Reads' Literacy Foundations, Community Classrooms, High School Equivalency, and Workforce Certifications	5,000
Jobs for America's Graduates Inc 1600 Duke Street Suite 210 Alexandria, VA 223142720		PC	To support the Jobs for America's Graduates National Student Leadership Academy	5,000
Latino Community Development Corporation 9445 Champton Dr Indianapolis, IN 46254		PC	To support the 2023 Santa Comes to Town event.	5,000
Leadership Conference Education Fund The 1620 L Street NW 1100 Washington, DC 20036		PC	To support the We The Majority: Annual Fundraising Reception	5,000
Miami Nation of Indians of the State of Indiana Inc PO Box 41 Peru, IN 46970		PC	To support the Miami Nation of Indiana with a land acknowledgement gift.	5,000
Mitch Daniels Leadership Foundation 880 Monon Green Blvd Suite 101 Carmel, IN 46032		PC	To support the annual MDLF event honoring the 2023 Daniels Prize Award recipient Teresa Lubbers.	5,000
Mount Moriah Missionary Baptist Church 2349-51 North Keystone Way Indianapolis, IN 46218		PC	To support free/low-cost community enrichment programs including home economics, job readiness, violence prevention and youth programs.	5,000
Naptown African American Theatre Collective Inc PO Box 44495 Indianapolis, IN 46244		PC	To support the Detroit '67 production.	5,000
New Venture Fund 1201 Connecticut Avenue NW Suite Washington, DC 20036		PC	To support the CJSF Annual Partner Convening.	5,000
Outreach Inc PO Box 11416 Indianapolis, IN 46201		PC	To support the 2023 Walking for Dreams.	5,000
PAVE Inc 1342 Florida Ave NW Washington, DC 20009		PC	To support the PAVE Parent Power Gala	5,000
Pennsylvania State University 110 Technology Center Building University Park, PA 16802		PC	To support an Academy focused on how to recruit, advance, and retain Faculty of Color.	5,000
RAND Corporation 1776 Main StreetPO Box 2138 Santa Monica, CA 904072138		PC	To support a webinar presenting research findings from the Strengthening the Manufacturing Workforce in Ohio, for the Ohio Manufacturing Association (OMA)	5,000
Steward Speakers Inc PO Box 88104 Indianapolis, IN 46208		PC	To support the 2023 Steward Speakers Annual Gala.	5,000
Tennessee State Collaborative on Reforming Education 1207 18th Avenue South Suite 326 Nashville, TN 37212		PC	The summit will elevate ways for education to workforce pathways to be transformed so that Tennesseans are prepared for the jobs of the future and discuss how business leaders can lead that needed transformation.	5,000
United Negro College Fund 8260 Willow Oaks Corporate DrivePO Fairfax, VA 220318044		PC	To support the UNCF UNITE Conference	5,000
Grantmakers for Effective Organizations 1725 DeSales Street Northwest Sui Washington, DC 200364406		PC	To support a cocktail reception after the American Evaluation Association conference that brings together evaluation directors in philanthropy and the Center for Evaluation Innovation.	4,800
Ubada Dancers Inc PO Box 22265 Indianapolis, IN 46222		PC	To support the Ubada 2023 Spring Production.	4,500
Indiana Natural Resources Foundation 402 West Washington W256 Indianapolis, IN 46204		PC	To provide general support.	4,500
Indiana Natural Resources Foundation 402 West Washington W256 Indianapolis, IN 46204		PC	To provide program support.	4,500
NAFSA Association of International Educators 1425 K Street NW Washington, DC 20005		PC	Support a session to promote equity practices across the globe at the NAFSA national conference.	4,500
NAFSA Association of International Educators 1425 K Street NW Washington, DC 20005		PC	Global Partnership Program is a key tool NAFSA uses to help forge strategic alliances with the broader NAFSA membership and other organizations engaged in the field.	4,500
Indiana Philanthropy Alliance 2100 Symphony Centre32 East Washing Indianapolis, IN 462043583		PC	This sponsorship will support several member-focused events scheduled for the remainder of the year.	4,000
Make-A-Wish Foundation of Ohio Kentucky and Indiana 2545 Farmers DriveSuite 300 Columbus, OH 43235		PC	To support the 2023 Wish Gala.	4,000
Association for Career and Technical Education 1410 King Street Alexandria, VA 22314		PC	To support ACTE's Postsecondary CTE convening.	3,500
Hope Academy Inc 3919 Madison Avenue Suite 100 Indianapolis, IN 46227		PC	To support the 2023 Rise & Shine for Hope breakfast.	3,000
Indianapolis Professional Association PO Box 20712 Indianapolis, IN 46220		PC	To support the IPA Spring & Fall Annual Networking Events	3,000
Mentoring Women's Network Foundation 202 East Market Street Indianapolis, IN 46204		PC	To support the International Women's Day Breakfast.	3,000
Cathedral High School 5225 E 56th Street Indianapolis, IN 46226		PC	To support the 10th Annual Trivia Night fundraiser	2,500
Catholic University of America The 620 Michigan Ave NE Washington, DC 20064		PC	To support the launch of the Africana Studies & Research program.	2,500
Council for the Study of Community Colleges (CSCC) 51 Gerty Drive Room 113 c/o Office of Community College Res Champaign, IL 61820		PC	To support the 2023 Council for the Study of Community Colleges annual conference.	2,500
Council for the Study of Community Colleges (CSCC) 51 Gerty Drive Room 113 c/o Office of Community College Res Champaign, IL 61820		PC	To support the 2024 Council for the Study of Community Colleges annual conference.	2,500
Delta Research and Education Foundation 1703 New Hampshire Ave NW Washington, DC 20009		PC	To support Impact Indy: H.O.M.E. for Delta Sigma Theta 56th National Convention in Indianapolis, IN.	2,500
Indiana Civil Rights Commission 100 N Senate Ave Room N300 Indianapolis, IN 46202		PC	To support the 2023 Indiana Civil Rights Commission Annual Conference	2,500
Indiana State Chamber of Commerce Foundation Inc 115 West Washington Street Suite 8 Indianapolis, IN 46204		SO I	To support the 2023 Diversity, Equity & Inclusion Summit	2,500
Indy Black Professionals Inc 6101 North Keystone Ste 100 1423 Indianapolis, IN 46220		PC	To support AfroBat Indy 2023	2,500
Indy Eleven Foundation 47 South Pennsylvania Street Suite Indianapolis, IN 46204		PC	To support the Indy Eleven Community Ticket Block Program	2,500
LifeSmart Youth 615 North Alabama Street 228 Indianapolis, IN 46204		PC	To support LifeSmart Youth's 40th Anniversary Celebration.	2,500
March on Washington Film Festival 525 9th Street NW 7th Floor Washington, DC 20004		PC	To support the Annual March on Washington Film Festival.	2,500
Michigan College Access Network 200 N Washington Sq Ste 210 Lansing, MI 48933		PC	To support MCAN's 12th Annual Conference.	2,500
National Archives Foundation 700 Pennsylvania Avenue NW Room G12 Washington, DC 20408		PC	To support the National Archives Foundation	2,500
Special Olympics of Indiana 6200 Technology Center Drive Suite Indianapolis, IN 46278		PC	To support the Special Olympics of Indiana 2023 Summer Games	2,500
TCC Gives Inc 10330 Kincaid Drive Suite 203 Fishers, IN 46037		PC	To support the 2023 More Than a Tailgate event.	2,500
Indianapolis Chess Club & Scholastic Center Inc PO Box 40663 Indianapolis, IN 46240		PC	To provide Inclusion Sponsorship for Chess Camps and Tournaments.	2,000
Eskenazi Health Foundation 720 Eskenazi AvenueFifth Third Bank Indianapolis, IN 46202		PC	To support the Gregory S. Fehribach Center Internship Networking Event at Victory Field.	1,500
Exodus Refugee Immigration 2457 East Washington Street Suite Indianapolis, IN 46201		PC	To support the 2023 Celebrate the Life Ahead Gala	1,250
Florida Association for Institutional Research Inc 1000 College Blvd Pensacola, FL 32504		PC	To support the 2023 Florida Association for Institutional Research annual conference.	1,000
Indiana Sports Corporation 201 South Capitol Avenue Suite 1200 Indianapolis, IN 46225		PC	To support the 2023 Indiana Sports Corporation's Corporate Challenge.	1,000
Greater Indianapolis Chamber of Commerce Foundation 111 Monument Circle Suite 1950 Indianapolis, IN 46204		SO I	To provide support.	500
HVAF of Indiana Inc 964 Pennsylvania St Indianapolis, IN 46204		PC	Donation in Lieu of flowers	500
HVAF of Indiana Inc 964 North Pennsylvania Street Indianapolis, IN 46204		PC	To provide program support.	500
St Mark's United Methodist Church 100 North Highway 46 Bypass Bloomington, IN 47408		PC	To support the nursery school fund.	375
Social and Environmental Entrepreneurs 23564 Calabasas Road Suite 201 Calabasas, CA 91302		PC	To support Solitary Watch.	300
Society for the Propagation of the Faith 70 West 36th Street 8th Floor New York, NY 10018		PC	To provide support.	300
National Multiple Sclerosis Society - New York 733rd Avenue 3rd Floor New York, NY 10017		PC	To provide general support.	270
American Diabetes Association PO Box 7023 Merrifield, VA 221167023		PC	To provide program support in memory of Nancy L. Tingle.	100
Firefly Children & Family Alliance Foundation Board (fka Children's Bureau) 1575 Dr Martin Luther King Jr Str Indianapolis, IN 46202		PC	In memory of Stephen Andrew Page.	100
Guam Community College PO Box 23069 Barrigada GQ		PC	To support community colleges in improving their capacity to engage and enroll potential students through enhanced digital presence, mobile design and accessibility.	150,000
Guam Community College PO Box 23069 Barrigada GQ		PC	To support the multimedia equipment and software upgrades for the communications and promotions office.	15,000
Ditchley Foundation The Ditchley Park Enstone Chipping Norton GB		PC	To explore shared systemic challenges among the US, UK, and other democracies.	600,000
Total . . . . ▶ **3a**				55,171,881
b *Approved for future payment*				
Open Campus Media Inc One Thomas Circle NW 700 Washington, DC 20005		PC	To support in-depth coverage of race and equity in higher education, and higher education coverage in Indiana.	275,000
Rutgers The State University of New Jersey 57 US Highway 1 New Brunswick, NJ 08854		PC	To support sustainability efforts of the Non-degree Credentials Research Network.	350,000
Tennessee Board of Regents 1 Bridgestone Park 3rd Floor Nashville, TN 37214		GOV	to build capacity to digitally engage adult learners in support of participation.	100,000
Total . . . . ▶ **3b**				725,000

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				135,360	
4 Dividends and interest from securities	901101	233,060	14	11,926,634	
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	901101	174,254	18	41,846,263	
9 Net income or (loss) from special events:					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:					
a			15	16,092	
b					
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)		407,314		53,924,349	0
13 **Total.** Add line 12, columns (b), (d), and (e). (See worksheet in line 13 instructions to verify calculations.)				13	54,331,663

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)	978	AICPA	organizational membership dues
1a(1)	298	American Payroll Institute Inc	organizational membership dues
1a(1)	350	Chartered Alt Investment Analyst Association	organizational membership dues
1a(1)	661	Indiana Chamber Services Inc	organizational membership dues
1a(1)	982	Indiana CPA Society (INCPAS)	organizational membership dues
1a(1)	2,000	Indy Chamber	organizational membership dues
1a(1)	3,500	Mass Ave Business and Merchants Association	organizational membership dues
1a(1)	458	SHRM-Society for Human Resource Mgmt	organizational membership dues
1a(1)	5,000	Visit Indy	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.

Signature of officer or trustee	Date	Title
	2024-11-15	

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
Steve Lenivy		2024-11-15		P01635350

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

Firm's address ▶ 231 S Bemiston Ave Suite 800, Clayton, MO 63105 — Phone no. (314) 802-2000

Additional Data

Return to Form

Software ID: 23017437
Software Version: 2023v5.1

Form 990PF - Special Condition Description:

Special Condition Description

TY 2023 IRS 990 e-File Render

Name: Lumina Foundation for Education Inc

EIN: 35-1813228

Software ID: 23017437

Software Version: 2023v5.1

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	250,368	22,860		18,737

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

TY 2023 IRS 990 e-File Render

Name: Lumina Foundation for Education Inc

EIN: 35-1813228

Software ID: 23017437

Software Version: 2023v5.1

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						170,572	15,300		
DEPLETION							558,636		

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

TY 2023 IRS 990 e-File Render

Name: Lumina Foundation for Education Inc
EIN: 35-1813228
Software ID: 23017437
Software Version: 2023v5.1

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
Bitwise		2018-12-21	1,500,000	Support growth and expansion of technology training focused on women and minorities.	1,500,000	To the knowledge of the foundation, no portion of the funds have been diverted.	2023-03-31T00:00:00		No further reports required. Filed for Chapter 7 bankruptcy in June 2023.
Brighthive		2019-12-23	500,000	Software product that enables multi-party data networks between education providers, employers, government agencies and learners.	500,000	To the knowledge of the foundation, no portion of the funds have been diverted.	3/31/23; 4/18/23; 5/16/23; 7/7/23; 9/29/23; 10/19/23; 12/13/23; 12/15/23		To the knowledge of the foundation and based on the GRANTEE'S REPORTS, no portion of the funds have been diverted FROM THE PURPOSES OF THE GRANT AND NO FURTHER VERIFICATION EFFORTS HAVE BEEN CONSIDERED NECESSARY.
Brighthive		2018-11-19	999,995	Software product that enables multi-party data networks between education providers, employers, government agencies and learners.	999,995	To the knowledge of the foundation, no portion of the funds have been diverted.	3/31/23; 4/18/23; 5/16/23; 7/7/23; 9/29/23; 10/19/23; 12/13/23; 12/15/23		To the knowledge of the foundation and based on the GRANTEE'S REPORTS, no portion of the funds have been diverted FROM THE PURPOSES OF THE GRANT AND NO FURTHER VERIFICATION EFFORTS HAVE BEEN CONSIDERED NECESSARY.
Care Academy	281 Summer Street Boston, MA 02210	2017-08-09	500,000	High quality training for in-home caregivers	500,000	To the knowledge of the foundation, no portion of the funds have been diverted.	2/26/23; 3/31/23; 5/18/23; 9/29/23; 12/13/23		To the knowledge of the foundation and based on the GRANTEE'S REPORTS, no portion of the funds have been diverted FROM THE PURPOSES OF THE GRANT AND NO FURTHER VERIFICATION EFFORTS HAVE BEEN CONSIDERED NECESSARY.
Care Academy	281 Summer Street Boston, MA 02210	2018-10-25	250,000	High quality training for in-home caregivers.	250,000	To the knowledge of the foundation, no portion of the funds have been diverted.	2/26/23; 3/31/23; 5/18/23; 9/29/23; 12/13/23		To the knowledge of the foundation and based on the GRANTEE'S REPORTS, no portion of the funds have been diverted FROM THE PURPOSES OF THE GRANT AND NO FURTHER VERIFICATION EFFORTS HAVE BEEN CONSIDERED NECESSARY.
Cell-Ed		2018-06-01	1,000,000	Platform for employers and education providers to upskill and retain workers through delivery of micro-lessons.	1,000,000	To the knowledge of the foundation, no portion of the funds have been diverted.	2/27/23; 3/31/23; 5/22/23; 8/10/23; 9/29/23; 10/5/23; 10/27/23; 12/6/23; 12/13/23; 12/18/23		To the knowledge of the foundation and based on the GRANTEE'S REPORTS, no portion of the funds have been diverted FROM THE PURPOSES OF THE GRANT AND NO FURTHER VERIFICATION EFFORTS HAVE BEEN CONSIDERED NECESSARY.
Cell-ed		2019-12-20	375,000	Platform for employers and education providers to up-skill and retain workers through delivery of micro-lessons.	375,000	To the knowledge of the foundation, no portion of the funds have been diverted.	2/27/23; 3/31/23; 5/22/23; 8/10/23; 9/29/23; 10/5/23; 10/27/23; 12/6/23; 12/13/23; 12/18/23		To the knowledge of the foundation and based on the GRANTEE'S REPORTS, no portion of the funds have been diverted FROM THE PURPOSES OF THE GRANT AND NO FURTHER VERIFICATION EFFORTS HAVE BEEN CONSIDERED NECESSARY.
College Consortium Inc Acadeum		2019-12-19	1,000,000	On-line course sharing among college networks.	1,000,000	To the knowledge of the foundation, no portion of the funds have been diverted.	1/13/23; 1/27; 3/31/23; 4/18/23; 5/8/23; 5/22/23; 7/27/23; 8/9/23; 9/29/23; 11/3/23; 12/13; 12/14/23		To the knowledge of the foundation and based on the GRANTEE'S REPORTS, no portion of the funds have been diverted FROM THE PURPOSES OF THE GRANT AND NO FURTHER VERIFICATION EFFORTS HAVE BEEN CONSIDERED NECESSARY.
College Consortium Inc Acadeum		2021-02-12	300,000	On-line course sharing among college networks.	300,000	To the knowledge of the foundation, no portion of the funds have been diverted.	1/13/23; 1/27; 3/31/23; 4/18/23; 5/8/23; 5/22/23; 7/27/23; 8/9/23; 9/29/23; 11/3/23; 12/13; 12/14/23		To the knowledge of the foundation and based on the GRANTEE'S REPORTS, no portion of the funds have been diverted FROM THE PURPOSES OF THE GRANT AND NO FURTHER VERIFICATION EFFORTS HAVE BEEN CONSIDERED NECESSARY.
Edovo		2019-04-12	349,997	Online education and self-improvement tools for prison inmates.	349,997	To the knowledge of the foundation, no portion of the funds have been diverted.	3/31/23; 4/13/23; 4/25/23; 8/14/23; 9/29/23		To the knowledge of the foundation and based on the GRANTEE'S REPORTS, no portion of the funds have been diverted FROM THE PURPOSES OF THE GRANT AND NO FURTHER VERIFICATION EFFORTS HAVE BEEN CONSIDERED NECESSARY. EDOVO DISSOLVED AS A COMPANY IN SEPTEMBER 2023.
Edovo		2017-07-18	750,000	Meaningful access to education, communication, and self-improvement tools for those affected by incarceration	750,000	To the knowledge of the foundation, no portion of the funds have been diverted.	3/31/23; 4/13/23; 4/25/23; 8/14/23; 9/29/23		To the knowledge of the foundation and based on the GRANTEE'S REPORTS, no portion of the funds have been diverted FROM THE PURPOSES OF THE GRANT AND NO FURTHER VERIFICATION EFFORTS HAVE BEEN CONSIDERED NECESSARY. EDOVO DISSOLVED AS A COMPANY IN SEPTEMBER 2023.
Edquity		2019-04-25	200,000	Platform providing financial tools and resources to support post-secondary completion rates.	200,000	To the knowledge of the foundation, no portion of the funds have been diverted.	3/12/23; 3/17/23; 3/31/23; 4/16/23; 5/1/23; 7/13/23; 8/7/23; 9/29/23; 10/10/23; 11/28/23; 12/13/23		To the knowledge of the foundation and based on the GRANTEE'S REPORTS, no portion of the funds have been diverted FROM THE PURPOSES OF THE GRANT AND NO FURTHER VERIFICATION EFFORTS HAVE BEEN CONSIDERED NECESSARY.
Edquity		2020-11-03	300,000	Platform providing financial tools and resources to support post-secondary completion rates.	300,000	To the knowledge of the foundation, no portion of the funds have been diverted.	3/12/23; 3/17/23; 3/31/23; 4/16/23; 5/1/23; 7/13/23; 8/7/23; 9/29/23; 10/10/23; 11/28/23; 12/13/23		To the knowledge of the foundation and based on the GRANTEE'S REPORTS, no portion of the funds have been diverted FROM THE PURPOSES OF THE GRANT AND NO FURTHER VERIFICATION EFFORTS HAVE BEEN CONSIDERED NECESSARY.
Edquity		2021-10-30	500,000	Platform providing financial tools and resources to support postsecondary completion rates.	500,000	To the knowledge of the foundation, no portion of the funds have been diverted.	3/12/23; 3/17/23; 3/31/23; 4/16/23; 5/1/23; 7/13/23; 8/7/23; 9/29/23; 10/10/23; 11/28/23; 12/13/23		To the knowledge of the foundation and based on the GRANTEE'S REPORTS, no portion of the funds have been diverted FROM THE PURPOSES OF THE GRANT AND NO FURTHER VERIFICATION EFFORTS HAVE BEEN CONSIDERED NECESSARY.
EduNav		2019-09-01	1,500,000	Academic planning software to provide students, advisors, and institutions timely data to	1,500,000	To the knowledge of the foundation, no portion of the	2/27/23; 3/31/23; 4/18/23; 6/9/23; 9/29/23; 11/28/23;		To the knowledge of the foundation and based on the GRANTEE'S REPORTS, no portion of the funds have been diverted FROM THE

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
				increase learner on-time completion rates.		funds have been diverted.	12/13/23		HAVE BEEN CONSIDERED NECESSARY.
EduNav		2020-12-22	100,000	Academic planning software to provide students, advisors, and institutions timely data to increase learner on-time completion rates.	100,000	To the knowledge of the foundation, no portion of the funds have been diverted.	2/27/23; 3/31/23; 4/18/23; 6/9/23; 9/29/23; 11/28/23; 12/13/23		To the knowledge of the foundation and based on the GRANTEE'S REPORTS, no portion of the funds have been diverted FROM THE PURPOSES OF THE GRANT AND NO FURTHER VERIFICATION EFFORTS HAVE BEEN CONSIDERED NECESSARY.
Edvisorly		2022-12-16	500,000	Software platform connects students with 2YR and 4YR partners for degree completion.	500,000	To the knowledge of the foundation, no portion of the funds have been diverted.	3/1/23; 3/31/23; 4/18/23; 7/13/23; 9/25/23; 9/29/23; 12/13/23		To the knowledge of the foundation and based on the GRANTEE'S REPORTS, no portion of the funds have been diverted FROM THE PURPOSES OF THE GRANT AND NO FURTHER VERIFICATION EFFORTS HAVE BEEN CONSIDERED NECESSARY.
Mentor Collective	294 Washington St Suite 607 Boston, MA 02108	2019-08-28	999,999	Scalable mentorship programs partnering with postsecondary institutions targeting Lumina's focused learner demographics.	999,999	To the knowledge of the foundation, no portion of the funds have been diverted.	2/3/23; 3/31/23; 4/12/23; 8/1/8/23; 8/22/23; 9/29/23; 11/9/23; 12/13/23		To the knowledge of the foundation and based on the GRANTEE'S REPORTS, no portion of the funds have been diverted FROM THE PURPOSES OF THE GRANT AND NO FURTHER VERIFICATION EFFORTS HAVE BEEN CONSIDERED NECESSARY.
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.	250,000	To the knowledge of the foundation, no portion of the funds have been diverted.	2/3/23; 3/31/23; 4/12/23; 8/1/8/23; 8/22/23; 9/29/23; 11/9/23; 12/13/23		To the knowledge of the foundation and based on the GRANTEE'S REPORTS, no portion of the funds have been diverted FROM THE PURPOSES OF THE GRANT AND NO FURTHER VERIFICATION EFFORTS HAVE BEEN CONSIDERED NECESSARY.
Savi Solutions		2023-06-28	500,000	Technology that makes it easier to navigate the complex landscape of student loan forgiveness and repayment.	500,000	To the knowledge of the foundation, no portion of the funds have been diverted.	4/18/23; 6/1/23; 8/24/23; 12/13/23		To the knowledge of the foundation and based on the GRANTEE'S REPORTS, no portion of the funds have been diverted FROM THE PURPOSES OF THE GRANT AND NO FURTHER VERIFICATION EFFORTS HAVE BEEN CONSIDERED NECESSARY.
Upswing		2017-07-06	750,000	Technology focused on improving student success through mentoring, advising and tutoring	750,000	To the knowledge of the foundation, no portion of the funds have been diverted.	3/31/23; 4/17/23; 8/3/23; 9/29/23; 10/31/23; 12/13/23		To the knowledge of the foundation and based on the GRANTEE'S REPORTS, no portion of the funds have been diverted FROM THE PURPOSES OF THE GRANT AND NO FURTHER VERIFICATION EFFORTS HAVE BEEN CONSIDERED NECESSARY.
Upswing		2018-11-19	500,000	Technology focused on improving student success through mentoring, advising and tutoring	500,000	To the knowledge of the foundation, no portion of the funds have been diverted.	3/31/23; 4/17/23; 8/3/23; 9/29/23; 10/31/23; 12/13/23		To the knowledge of the foundation and based on the GRANTEE'S REPORTS, no portion of the funds have been diverted FROM THE PURPOSES OF THE GRANT AND NO FURTHER VERIFICATION EFFORTS HAVE BEEN CONSIDERED NECESSARY.
Upswing		2020-12-29	340,000	Technology focused on improving student success through mentoring, advising and tutoring	340,000	To the knowledge of the foundation, no portion of the funds have been diverted.	3/31/23; 4/17/23; 8/3/23; 9/29/23; 10/31/23; 12/13/23		To the knowledge of the foundation and based on the GRANTEE'S REPORTS, no portion of the funds have been diverted FROM THE PURPOSES OF THE GRANT AND NO FURTHER VERIFICATION EFFORTS HAVE BEEN CONSIDERED NECESSARY.

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

TY 2023 IRS 990 e-File Render

Name: Lumina Foundation for Education Inc
EIN: 35-1813228
Software ID: 23017437
Software Version: 2023v5.1

Name	Date Acquired	How Acquired	Date Sold	Purchaser Name	Gross Sales Price	Basis	Basis Method	Sales Expenses	Total (net)	Accumulated Depreciation
					42,020,517				42,020,517	

TY 2023 IRS 990 e-File Render

Name: Lumina Foundation for Education Inc

EIN: 35-1813228

Software ID: 23017437

Software Version: 2023v5.1

Name of Bond	End of Year Book Value	End of Year Fair Market Value
Corporate bonds	39,577,647	39,577,647

TY 2023 IRS 990 e-File Render

Name: Lumina Foundation for Education Inc

EIN: 35-1813228

Software ID: 23017437

Software Version: 2023v5.1

Name of Stock	End of Year Book Value	End of Year Fair Market Value
Corporate stock	313,996,528	313,996,528

TY 2023 IRS 990 e-File Render

Name:	Lumina Foundation for Education Inc
EIN:	35-1813228
Software ID:	23017437
Software Version:	2023v5.1
US Government Securities - End of Year Book Value:	19,829,005
US Government Securities - End of Year Fair Market Value:	19,829,005
State & Local Government Securities - End of Year Book Value:	0
State & Local Government Securities - End of Year Fair Market Value:	0

TY 2023 IRS 990 e-File Render

Name: Lumina Foundation for Education Inc

EIN: 35-1813228

Software ID: 23017437

Software Version: 2023v5.1

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
Other	FMV	990,675,400	990,675,400

TY 2023 IRS 990 e-File Render

Name: Lumina Foundation for Education Inc

EIN: 35-1813228

Software ID: 23017437

Software Version: 2023v5.1

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
FURNITURE AND EQUIPMENT	1,391,969	1,243,568	148,401	148,401
LEASEHOLD IMPROVEMENTS	4,501,537	4,414,841	86,696	86,696
OTHER ASSETS	2,011,713	1,852,686	159,027	159,027

TY 2023 IRS 990 e-File Render

Name: Lumina Foundation for Education Inc

EIN: 35-1813228

Software ID: 23017437

Software Version: 2023v5.1

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL FEES	611,752	130,108		447,198

TY 2023 IRS 990 e-File Render

Name: Lumina Foundation for Education Inc

EIN: 35-1813228

Software ID: 23017437

Software Version: 2023v5.1

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
PROGRAM RELATED INVESTMENTS	26,557,485	22,746,639	22,746,639
CHARITABLE REMAINDER TRUST	607,802	730,011	730,011
OTHER ASSETS	0	1,809,456	1,809,456
OPERATING LEASE RIGHT-OF-USE ASSET	3,041,120	2,264,964	2,264,964
INVESTMENT PROCEEDS RECEIVABLE	28,309,427	39,446,354	39,446,354
CIP/WIP	0	1,452,165	1,452,165

TY 2023 IRS 990 e-File Render

Name: Lumina Foundation for Education Inc

EIN: 35-1813228

Software ID: 23017437

Software Version: 2023v5.1

Description	Amount
UNREALIZED LOSS	221,146,077

TY 2023 IRS 990 e-File Render

Name: Lumina Foundation for Education Inc

EIN: 35-1813228

Software ID: 23017437

Software Version: 2023v5.1

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
PROGRAM DEVELOPMENT	10,201,587			10,201,587
RECRUTING/STAFF DEVELOPMENT	825,231			825,231
COMMUNICATIONS/TECHNOLOGY	770,836	61,627		702,133
DUES	400,777	13,455		525,955
OTHER MISCELLANEOUS EXPENSE	180,775			134,775
INSURANCE EXPENSE	150,124			150,124
OFFICE EXPENSE	109,943	314		109,593
OTHER EXPENSES FROM K-1'S		11,243,797		

TY 2023 IRS 990 e-File Render

Name: Lumina Foundation for Education Inc

EIN: 35-1813228

Software ID: 23017437

Software Version: 2023v5.1

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
OTHER INVESTMENT INCOME/LOSS	16,092	16,092	
TOTAL OF OTHER INCOME LISTED ON K-1'S		10,320,592	

TY 2023 IRS 990 e-File Render

Name: Lumina Foundation for Education Inc

EIN: 35-1813228

Software ID: 23017437

Software Version: 2023v5.1

Description	Amount
UNREALIZED GAIN	321,879,437
CHARITABLE REMAINDER TRUST	122,209

TY 2023 IRS 990 e-File Render

Name: Lumina Foundation for Education Inc

EIN: 35-1813228

Software ID: 23017437

Software Version: 2023v5.1

Description	Beginning of Year - Book Value	End of Year - Book Value
OPERATING LEASE LIABILITY	3,167,547	2,496,821

TY 2023 IRS 990 e-File Render

Name: Lumina Foundation for Education Inc

EIN: 35-1813228

Software ID: 23017437

Software Version: 2023v5.1

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT MANAGER FEES	3,531,541	3,202,177		
VARIOUS OTHER PROFESSIONAL/CONSULTING FEES	1,530,325	0		1,403,171

TY 2023 IRS 990 e-File Render

Name: Lumina Foundation for Education Inc

EIN: 35-1813228

Software ID: 23017437

Software Version: 2023v5.1

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAXES PAID ON K-1'S		384,758		
TAX EXPENSE	1,198,804			

TY 2023 IRS 990 e-File Render

Name: Lumina Foundation for Education Inc

EIN: 35-1813228

Software ID: 23017437

Software Version: 2023v5.1

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				