Heartland Innovation.
NATIONAL INFLUENCE.

SAGAMORE’S HEADQUARTERS at THE LEVEY MANSION
“The highest honor an Indiana governor gives is called the Sagamore of the Wabash.... [It’s] given for wisdom, and public commitment, and a concern for the well-being of others. So, I’d say that Sagamore chose its name well, and is living up to it every day.”

FORMER INDIANA GOV. MITCH DANIELS
Dear Friends,

Sagamore Institute is celebrating its 10th anniversary in 2014 and this report stands as testimony to the record of success that has been made possible by the generosity of our donors. We have completed hundreds of projects in over a dozen states and half dozen nations. We have received $20 million dollars from customers buying our research and consulting services as well as contributors investing in our mission.

What joins the board, staff and donors is a belief that ideas matter and that the heartland is a strategic place for innovation and enterprise. The national news is filled with stories about Washington D.C.’s leaders being stuck in old debates or otherwise fighting on narrow grounds. Those of us in America’s 50 states understand that everyday citizens are the ones who create jobs, invent products, educate the next generation and build a better society. This is not an accident; indeed, it’s the heart of the American Experiment.

It has been my high honor to serve as chairman of Sagamore, a duty that began when I joined then-US Ambassador to Germany Dan Coats and Jay Hein in founding Sagamore. The board desired for Dan and me to serve as co-chairs to reflect the think tank’s equal commitment to its heartland roots and its national influence.

Dan’s contributions were not limited to his excellent leadership of the organization. Rather, the case can be made that Sagamore simply wouldn’t exist without Dan and Marsha Coats’ vision for an Indianapolis think tank and their personal generosity. As a matter of fact, it was their Foundation for American Renewal that served as the business engine for Sagamore until we received our own 501c3 designation and thereafter they donated over a quarter of a million dollars to our efforts to strengthen Indiana and export Hoosier common sense to the national stage.

As meaningful as our efforts have been over the past decade, I am certain that we are poised for much greater impact in the years ahead. Our value proposition is firmly established, our network of scholars is deep and wide, and our opportunities to serve are expanding rapidly.

On behalf of Sagamore’s Board of Trustees, I encourage you to read carefully the accomplishments of our think tank over its three phases of growth: the Founding Era, 2004-05; In the Nation’s Service, 2006-09; and Deepening Our Roots, Extending Our Reach, 2010-14.

Thank you for your partnership and please join us in writing the next chapter in Sagamore’s story of reforming government and revitalizing communities.

Sincerely,

Jerry D. Semler
Chairman
Dear Friends,

I am often asked, “What is a think tank?” My answer is that we’re a place where ideas get put to work. How we think about our challenges is very important and we work hard to produce research that gives fresh insight into stubborn problems. Yet, it’s insufficient to simply seek better understanding. We want to attach promising solutions to those same problems and foster innovation in both policymaking and local practice.

In this “thinking and doing” companionship, we often find ourselves leading leaders and serving servants. We have advised grassroots nonprofit leaders, corporate CEOs and heads of state. While these leaders face dramatically different problems, they all need to make decisions with too little time and too little information. Since we enjoy the advantage of permanently being in research and development, we boldly step into those decision-making processes and offer counsel on what works, what doesn’t and why.

Yet, we maintain a more humble posture in the entrepreneur’s workplace, the master teacher’s classroom or the nonprofit innovator’s office. They are on the frontlines trying the hard things with brilliance and bravery. Sometimes they win and sometimes they don’t. Regardless, we have pens ready to capture the insights gained from the daring adventures to help guide future travelers. Beyond conducting pioneering research in these settings, we offer technical assistance to heighten the prospects of success and pave the way for replication.

Given the wide-ranging activities of our distributed network of scholars, the second question I am often asked is, “So how do you define success?” To answer that question, I like to draw the following illustration on a napkin or white board:

<table>
<thead>
<tr>
<th>IDEAS</th>
<th>IMPACT</th>
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It starts with ideas. Each of our activities must begin with an idea that will make the world a better place if it works. Since we’re about moving ideas into action, the second measure needs to be impact. If the ideas and our execution are good, we’ll achieve real results for real people in real communities at home and abroad.

We also have the high privilege and heavy responsibility of guiding leaders’ decisions and educating the public. This means that we must use our influence wisely and persuasively. Finally, we need to meet the market needs of our customers and the missional needs of our donors. This means that income is an essential measure, as well.

It is said that a philosopher’s job is to discern. I seek to lead Sagamore in this pursuit every day. We are on overload in the Internet Age, but knowledge and wisdom are rarer commodities. In our counsel to policymakers, support for innovators and educating the public, we hope to live up to our sagamore moniker by being wise counsel to a world in progress.

Sincerely,

Jay F. Hein
President

MESSAGE from the PRESIDENT
Sagamore Institute is an Indianapolis-based non-profit, nonpartisan, public policy research organization—or “think tank.” We borrow our name from the Algonquin word sagamore, which refers to a trusted individual within the tribe to whom the chief would look for wisdom and advice on issues of public concern. It is thus our mission to research and analyze difficult issues, to serve as a meeting place for disparate groups, and to offer wise counsel for a world in progress.

We were born in the spring of 2004, but have roots stretching back two decades thanks to our founders’ leadership roles within the Hudson Institute’s Indianapolis headquarters. When Hudson moved to Indiana in 1984, it undertook a big experiment: could a national policy think tank survive in the Heartland of America?

Twenty years later, as the Hudson board decided to move back to the East Coast to focus on Middle East policy, the answer was that not only could they survive but thrive. Thanks to presidents such as Mitch Daniels and Les Lenkowsky and board members such as Dan Evans and John Mutz, Hudson turned from deficit spending to balanced books and a new $8 million endowment. It also led the national debate with such successes as the book *Workforce 2020* and the policy impact found in their scholars’ support to then-Wisconsin Governor Tommy Thompson’s welfare reforms.

Sagamore built on this foundation by forming an expert network of fellows providing independent and innovative research and analysis to public and private sector leaders. We believe that public policy belongs to everyone—not just to those inside Washington’s beltway of Washington, D.C.—and that citizens are at the center of problem solving.

Our location in Indianapolis places us at the global crossroads and in a geographic venue full of innovative international corporations, the second largest concentration of non-profits in the nation, a burgeoning immigrant population, a vibrant university system, and an ever-changing civic culture.

“Our main value proposition is moving ideas to action. We do not ask who is for or against certain reforms. We ask how we are going to fix society’s most stubborn problems and sustain our most promising solutions.”

JAY HEIN
From the nation’s Heartland, we are able to locate, identify, and highlight innovators, entrepreneurs, practitioners, and experts that typically fall outside of the beltway’s field of vision. We also have the advantage of seeing policy innovations as they develop, and thus being on the cutting edge of policy analysis. Our ability to challenge the conventional wisdom through our research benefits both policymakers and residents in our own city and state; but we also know that local innovations can have a national and even international impact, just as faraway events can hit close to home in a world as connected as ours.

Unfortunately, far too many innovators work in a vacuum. They may be creating new solutions that are improving their condition, yet the lessons they have learned from their experiences aren’t disseminated for the benefit of other communities or the nation. So, good work happens, but it is marginalized, lost, forgotten.

Sagamore Institute helps to correct that problem. We leverage the best ideas and initiatives. We amplify a different way of thinking, doing, and transforming. We fill the gap between pervasive problems and sound solutions - by connecting the best ideas with leaders who can transform innovative practitioners, learning from them, and measuring the impact of ideas and theories put into practice. This allows us to gain insight into which prescriptions work, which don’t, and why.

And because we know one size does not fit all in addressing our most persistent societal challenges, we think not only about what’s possible, but what it actually takes to transform good ideas into action that improves the reality of citizens in communities across America. We combine the power of new thinking with the power of effective action to transform our neighborhoods, communities, and nation one idea at a time.

“As a former Assistant Attorney General with the U.S. Department of Justice, I know from experience that a Heartland perspective is invaluable. From crime prevention programs to community and economic development, from trade to terrorism and disaster preparedness, the policy decisions facing our local and state officials have far-reaching implications.”

DEBORAH DANIELS
Sagamore Institute was born in the dining room of the United States Senate on February 12, 2004. Dan Coats, then US Ambassador to Germany, was hosting Jay Hein for lunch along with a vice president at Pew Charitable Trusts named Luis Lugo. Their topic of conversation was a multi-million dollar grant that Lugo was planning to award to Hein’s team at Hudson Institute in part because of its association with Dan and Marsha Coats’ Foundation for American Renewal.

As Hein and Lugo walked from the Capitol to Union Station following lunch, Hein received a call from Hudson Institute president Herb London who announced that after twenty successful years in Indianapolis, Hudson was changing its headquarters to Washington, D.C. Hein and Coats immediately decided that the Indianapolis think tank franchise needed to be preserved and thus founded Sagamore to make its inaugural year the de facto 21st year of a national think tank in Indianapolis. Hudon, for their part, robustly supported Sagamore’s development by transferring publishing rights of American Outlook and other assets formerly aligned with Hudson’s heartland identity.

One of the most important Hudson-to-Sagamore assets was Les Lenkowsky who succeeded Mitch Daniels as Hudson’s president in the early 1990s. Among Leskowsky’s most notable achievements was establishing a Hudson office in Madison, Wisconsin to assist then-Governor Tommy Thompson in designing his break-the-mold welfare reforms. Following his tenure at Hudson, Lenkowsky became a professor at Indiana University where he taught public policy in Bloomington and at the Center on Philanthropy in Indianapolis. Hein approached Lenkowsky with an invitation to serve as a founding member of Sagamore’s board of trustees and to facilitate receipt of the Pew Charitable Trust grant at the IU Center on Philanthropy since Sagamore would not have its incorporation papers in time for the grant award.

This confluence of Hudson Institute’s legacy, the Foundation for American Renewal’s strategic partnership and Indiana University’s formal alliance established Sagamore as a think tank with national influence and with roots planted deeply in Indiana soil. Consider the work of these five senior fellows: >>
A former Indiana principal of the year, Sagamore recruited Bolinger to return to the state from his post at the Princeton, NJ-based Woodrow Wilson Foundation to serve as a senior fellow and founding CEO of Herron High School which was named the 27th best high school in American in 2010.

Nationally renowned for her “faith factor” research, Sherman directed the Pew Charitable Trusts-sponsored Faith and Service Technical Assistance Network which became the premiere source for faith-based community solutions. Her thought leadership was also on display as a platform speaker at national conferences, during congressional testimony and as author of several books and dozens of articles.

As a senior fellow at Sagamore and contributing editor of The American Legion Magazine, Dowd has published hundreds of articles on national security and foreign policy in such publications as the Weekly Standard, Jerusalem Post, Financial Times Deutschland, National Review Online, Baltimore Sun and many more.

With a PhD from UC-Berkeley and experience advising the democratic opposition in Poland and Hungary in the 1980s, Clark served as Hudson’s foreign policy guru throughout the 1990s. His focus as a member of Sagamore’s founding team was to explore the nexus of Indiana and the world including projects aimed at better understanding Indiana’s relationship with Mexico and the broader subjects of immigration and Indiana’s growing ties to Africa.

Ealy launched the Conversations in Philanthropy book series in 2004 that is an intellectual descendent of the landmark book by her friend Richard Cornuelle. Forty years earlier, Cornuelle published a book called Reclaiming the American Dream which coined the term “independent sector” and unleashed a torrent of ideas about the role of private volunteerism and philanthropy to solve social problems. The New York City-based Cornuelle tested many of his concepts in Indianapolis alongside his partner John Burkhart making the city both his laboratory and intellectual legacy.
Globalization has taken away the question of “whether” states should participate in world affairs and replaced it with the question of “how.” From trade exports to talent imports, Indiana has aggressively embraced its role on the global stage and Sagamore scholars have helped navigate the terrain.

**ASIA.** During its inaugural year in 2004, the South Korean government established a multi-year fellowship program at Sagamore for mid-career officers at the Ministry of Knowledge Economy. In 2006, Indiana Governor Mitch Daniels tasked Sagamore to form a research partnership with the Zhejiang Academy of Social Sciences (ZASS) to investigate trade opportunities between the two states. Sagamore’s collaboration with ZASS is intended to transition the relationship from cultural exchange to a more robust economic partnership.

Sagamore fellow Larry Ingraham served as then-Governor Orr and Lieutenant Governor John Mutz’ staff person in Japan during Indiana’s successful effort to build a bridge for Japanese investment in the 1980s. Over the next two decades, more than 250 Japanese companies began operations in the state employing over 45,000 Hoosiers at a total investment of more than $10 billion. Sagamore produced a case study on the Japan success story to strengthen planning efforts for Indiana’s China trade strategy.

**AFRICA.** Indiana University established a medical school in Eldoret, Kenya in 1988 during the dawn of the African AIDs crisis and a decade later it was the continent’s greatest hope for fighting the disease. The key ingredient to that success was the character of Indiana’s partnership: it took the best of IU’s talent and resources and invested both into African leaders and indigenous solutions.

In partnership with the Indianapolis Downtown Rotary Club, Sagamore conducted research on this model in Nairobi and expanded its research focus to Liberia following a visit to Sagamore by Liberian presidential candidate Ellen Johnson Sirleaf. This research culminated in a later project chronicling hundreds of Indiana business, educational and charitable efforts across sub-Saharan Africa. Over 100 gathered to hear United States Senator Dick Lugar’s commentary on Sagamore’s “Indiana-Africa Connections” research project.

**MEXICO.** Mexico’s Ambassador to the United States, Carlos de Icaza visited Sagamore in 2006 to discuss the strategic relationship between Indiana and our nation’s southern neighbor. Joining de Icaza at the Sagamore event was then-Mexican Consul to Indiana Sergio Aguilera, who explained, “Mexico is the second largest trading partner of Indiana, and the opportunities abound for more trade, investments, and exchanges in areas like agriculture, manufacturing and logistics. These ties are significant, and they benefit both sides.”

Sagamore fellows Justin Heet and John Clark produced a major report to underscore the significance of Consul Aguilera’s words. During the year prior to de Icaza’s visit, the total value of imports and exports between Mexico and Indiana was $5,454,052,554. This amount is twenty percent larger than merely three years previous, demonstrating the vitality of the shared markets. Heet and Clark found that Mexican immigrants contributed more than $200 million annually to the state of Indiana and its counties and they possessed a buying power over $4.8 billion. One of the study’s key findings was that immigrants often perform tasks that most American’s don’t want to do (manual labor) or many can’t do (sophisticated technology jobs).
1. Former Indiana Lt. Governor John Mutz was the Hudson Institute board member chiefly responsible for the Hudson-to-Sagamore transition. He was also the subject of a Sagamore case study of Indiana's trade relationship with Japan, which he spearheaded in the 1980s.

2. Ellen Johnson Sirleaf delivered remarks to Sagamore in the months prior to her being elected the first woman president in Africa. Following, native Liberian Donald Cassell joined Sagamore as a senior fellow to foster Indiana-Liberia partnerships.

3. Sergio Aguilera (seen here with his wife, Lori Efroymson) was the first Consul General appointed by Mexico to serve in Indiana. He joined Sagamore as a founding board member and an expert contributor to the think tank's immigration study.

4. Sagamore teamed up with Indianapolis social entrepreneur Joanna Taft to establish Herron High School which soon became one of the highest performing charter schools in the nation.

5. To further trade relations between Indiana and Asia, Sagamore formed the Mayors Roundtable on Global Trade. Mayors perform a critical economic development function especially in attracting new business to locate in their regions.

6. Indiana Secretary of State Todd Rokita and former Indiana Congressman Lee Hamilton joined Jay Hein in addressing a 2005 Sagamore event on electoral reform.

7. The Bradley Foundation sponsored a fellowship for Don Eberly to produce a book on global civil society at Sagamore. As a result of globalization, power is shifting from vertical state-to-state relations to horizontal citizen-to-citizen initiatives.

8. As part of Sagamore's founding, Senior Fellow Amy Sherman opened a field office in Charlottesville, Virginia. The Indiana-Virginia bases of operations underscore the think tank’s commitment to heartland impact and national influence.
Deborah Daniels served as president of Sagamore Institute from 2006-08 and her career epitomizes the think tank’s vision for local impact and national influence. As the U.S. Attorney for the Southern District of Indiana during the President George H.W. Bush administration, Daniels helped pioneer the Weed and Seed program in Indianapolis integrating law enforcement, community policing, violence prevention and neighborhood restoration efforts. The success led to her being named the first Director of the Executive Office of Weed and Seed at the U.S. Department of Justice in 1992-93.

Daniels returned to Indianapolis in the mid-1990s to lead the Greater Indianapolis Progress Committee which bolstered economic development and neighborhood revitalization during the national pace-setting administration of Indianapolis mayor Stephen Goldsmith. Goldsmith hosted then-Texas Governor George W. Bush in Indianapolis for his presidential campaign’s first policy speech in 1999 which was followed by a half dozen Sagamore board members eventually serving in the Bush administration.

The Honorable Daniel R. Coats served as U.S. Ambassador to Germany from 2001-2005. He currently represents the people of Indiana as a member of the U.S. Senate.

James T. Morris served as the Executive Director of the United Nations World Food Program, the world’s largest food aid organization, from 2002-07. He is presently President of Pacers Sports and Entertainment.

Dr. Leslie Lenkowsky was chief executive officer of the Corporation for National and Community Service from 2001-04 serving under the leadership of CNCS chair Stephen Goldsmith. Lenkowsky is now a faculty member at Indiana University.

Dr. Carol D’Amico served as Assistant Secretary for Vocational and Adult Education at the U.S. Department of Education from 2001-03. She is currently senior vice president at USA Funds. »
Deborah Daniels was invited back to the Justice Department in 2001, this time to serve as Assistant Attorney General with oversight over the Department’s Office of Justice Programs. She returned to Indiana in 2005 and accepted an invitation from Sagamore’s board of trustees to serve as think tank president in 2006 when founding president Jay Hein was invited by President Bush to serve in the White House.

In addition to the Sagamore board members who served the President before returning to Indiana, two senior fellows also were named to senior positions in the Bush administration.

Don Eberly served in both the White House and State Department. Based on this experience, the Bradley Foundation awarded him a fellowship at Sagamore to produce a book called *The Rise of Global Civil Society*, named by the U.S. Chamber of Commerce as one of its top ten books “That Drive the Debate” in 2008. Eberly then put the book’s ideas into action as a senior official tasked with building civil society in Afghanistan.

Ryan Streeter served on Hein’s team at Hudson Institute where he and Eberly co-authored a book on the voluntary sector. Streeter was first assigned to a post at the U.S. Department of Housing and Urban Development before becoming Special Assistant to the President and a member of the White House Domestic Policy Council. Following his federal service, Streeter helped launch a think tank in London before returning to Indianapolis as director of economic studies at Sagamore.

George W. Bush’s faith-based initiative was planted in rich Indiana soil. Early momentum was built by United States Senator Dan Coats’ Project for American Renewal promoting charitable tax credits, restorative justice and other effective compassion strategies. Next was Indianapolis mayor Steve Goldsmith’s Front Porch Alliance, a civic switchboard empowering faith-based charities to improve their neighborhoods. Texas Governor Bush used the Front Porch Alliance as the setting for his first presidential campaign policy speech in 1999 rallying America’s armies of compassion.

Following his 2000 election, the new president turned to Goldsmith as well as future Sagamore team members Les Lenkowsky, Don Eberly and Ryan Streeter to help launch his compassion agenda through the Corporation for National Service and faith-based initiative. Jay Hein was invited to lead the faith-based initiative during the Bush administration’s second term.

From his office in the White House, Hein looked past congress and instead focused on the nation’s governors and grassroots leaders to fulfill the faith-based initiative’s promise. This vision favored problem-solving over press coverage and results over rhetoric. It also fit the model born a decade earlier in Indiana that gave emphasis to private efforts—volunteers, philanthropy, charities—serving in the public interest. President Bush would often visit these community healers, drape his arm around their shoulder, and say “When you serve a neighbor in need, you’re serving your nation. And I’m here to say ‘Thank you.’”

When Amazon launched their faith-based publishing company in 2013 called Waterfall Press, they invited Hein to tell these stories in Waterfall’s first major book. He chose the title *The Quiet Revolution* because the work of serving neighbors in need is often done in obscurity. Yet, these countless acts of selfless service amount to hundreds of billions of dollars in charitable giving each year resulting in transformed lives and revitalized communities. Readers will see this revolution unfold from America’s prisons to Africa’s dusty village roads and from the White House to the Supreme Court and more.
Sagamore reaches deep in society through its participatory research model. Our fellows do not sit in an ivory tower but rather get their hands dirty working alongside policymakers and city-level innovators trying to make the world a better place. While the projects are often local, the locales stretch from our headquarters city of Indianapolis to over a dozen states and multiple nations. This is a result of what we refer to as a distributed network of scholars.

With a bias for action, we also have a passion for teaching and a responsibility to exercise our influence for a greater good. Sagamore fulfills this role through a series of events, publications and media strategies enabling its voice to be heard by elite decision makers as well as everyday citizens. From the National Press Club to London’s Westminster and from the op-ed pages to C-SPAN, Sagamore’s team members are making their voices heard.

One notable example is Sagamore’s partnership with Indiana Wesleyan University to conduct a series of National Conversations on the great issues of our day. The goal is to create an irenic dialogue in place of us-versus-them debates that dominate today’s discourse. It is not about smoothing over differences but rather illuminating them in the context of civility and respect to reach a deeper understanding of the challenges and a clearer line of sight to solutions.

Another strategic partnership Sagamore formed to widen its reach is the annual Weekend in Boca conference aimed at strengthening America’s nonprofit sector. Office Depot is a Fortune 200 company whose longtime slogan is “Taking Care of Business.” Sagamore’s Jay Hein produced a white paper for the company’s foundation that demonstrated that nonprofits are at the heart of small business by creating one in ten jobs in the American economy. Hein delivered a keynote address on these points at the inaugural Weekend in Boca in 2008 and he’s shaped the agenda for each subsequent conference.

Beyond the annual event, Sagamore designed a series of “Community Conversations” to extend the Weekend in Boca themes in such places as Atlanta, Detroit, Washington, D.C., Indianapolis, Boston and Charlotte. This regional focus enabled wider participation and shifted the focus to on-the-ground solutions befitting Sagamore’s “ideas into action” methodologies.

Sagamore’s primary contribution to the national conversation is quarterly publication of its journal, American Outlook. Sagamore scholars and our network of leaders contribute timely articles and penetrating analysis on a wide range of subjects. In the information age, there is perhaps too much information and not enough discernment and wisdom. American Outlook seeks to remedy that problem by digging deep into the issues, giving context and offering solutions blending first principles and innovation.

The voices heard in past editions include the likes of Laura Bush, General Electric CEO Jeffrey Immelt, U.S. Senator Dick Lugar, Tony Dungy, former U.S. Education Secretary William J. Bennett, renowned historian David McCullough, Donald Rumsfeld, Arthur Brooks and many other Sagamore fellows.
1. Ryan Streeter directed economic studies at Sagamore including an Aspiration Agenda research project aimed at creating the Midwest as a place that people, investors and entrepreneurs find attractive. He also conducted a comprehensive review of Indiana Gov. Mitch Daniels reforms.

2. Bradley Foundation officials Daniel Schmidt and Michael Hartmann join Indiana Gov. Mitch Daniels (a former Bradley board member) in conversation following Sagamore’s Working Group on Fiscal Policy.

3. Former US Secretary of Education William J. Bennett established a project at Sagamore to promote his history book series and the advancement of civic education.

4. Sagamore formed a federally-funded research partnership with Recycle Force, a national model training former prisoners to recycle computer equipment. Sagamore’s crime prevention team also contributed new strategies to reductions in firearms and meth production.

5. Sagamore and Indiana Wesleyan University collaborated to host a series of National Conversations in Indianapolis (health care), Washington, D.C. (education) and London (economy).

6. Sagamore awarded its inaugural Celebrating Ideas Award to the Navajo Code Talkers for their role in helping win World War II. Peter MacDonald is shown here accepting the award at Sagamore’s gala.

7. U.S. Ambassador to Germany Dan Coats took up his post just a few days before 9/11. Following the attack, he addressed thousands at the Brandenburg Gate in Berlin where the German people pledged their solidarity.

8. Sagamore fellow Don Eberly accepted a State Department assignment to strengthen civil society in Afghanistan following military operations. He is seen here with tribal leaders.

When Super Bowl XLVI was held in downtown Indianapolis in February 2012, the world was introduced to a thirty-year strategy to build a city’s economy and revitalize its distressed neighborhoods through sports. Sagamore conducted original research, co-produced a documentary and published a special edition of American Outlook to reveal Indianapolis’ special formula for civic renewal. >>
America’s Founding Fathers intended for citizens, not the state, to be at the center of problem solving. No place fulfills that promise more vibrantly than Indianapolis which makes it an ideal environment for a think tank. That said, the priority of citizen-centered solutions and essential nature of a free society does not mean there is no place for government. Rather, the state should be limited and competent and that is exactly what Indiana has enjoyed under the impressive leadership of Governors Mitch Daniels and Mike Pence.

Sagamore senior fellow Ryan Streeter received support from the Bradley Foundation to document “The Indiana Story,” a series of briefs on more than a dozen of Daniels’ government reforms. Streeter was then invited to serve as senior policy director for Gov. Mike Pence to assist the new administration in furthering these reforms and advancing an entrepreneurial culture across the state.

Sagamore has an affinity for governors: in contrast to the political dysfunction in Washington, D.C., reform-minded governors think big and act boldly. Jay Hein experienced this reward as a welfare policy aide to former Wisconsin Governor Thompson and was thus honored to host Thompson and U.K. Secretary of State for Work and Pensions Iain Duncan Smith for a discussion on how Britain is replicating the Wisconsin model. The event was held at the National Press Club on September 17, 2013 and it signals how state-level innovation can change the world.

To honor the centennial of Ronald Reagan’s birth, Sagamore co-hosted two events—one at his alma mater, Eureka College, and the other at his ranch in California—and published a cover story in American Outlook depicting the influence of Reagan’s heartland youth on his presidential leadership. Sagamore will sustain a periodic series of these same events under the banner, “Prairie & Ranch.”

On the global stage, Sagamore researchers eschew abstract or ideological debate and instead bring forth innovative solutions. Jay Hein has been invited to build a think tank in Rwanda promoting enterprise solutions to poverty. Called ISOKO, which means “marketplace,” the think tank will conduct research, supply policy counsel to African heads of state and help private businesses incubate and grow across East Africa.

What do national security and economic development have to do with each other? In the era of defense spending cuts and escalating international conflicts, how can training and equipment be higher tech, lower cost and more speedily delivered? And what could a Midwestern state contribute to these questions?

Sagamore supplies answers to each of these questions through its “State of Defense” initiative with the tripartite mission of delivering thought leadership on national security in the 21st century, advancing private sector solutions to the military and growing Indiana’s economy as a result. Consider the following activities:

**Nat’l Ctr. for Complex Operations**
Led by former Pentagon official and Sagamore fellow Mathew Konkler, the NCCO provides new strategies for Special Operations in training and equipment; for military, homeland security and agricultural customers interested in unmanned systems; and for multiple partners in cyber systems.

**AStateofDefense.com**
This website has become the one-stop shop for understanding Indiana’s defense industry and its economic impact.

**Mid America Defense Conference**
Held annually, this conference assembles leading edge thinkers with officials from government, military and commerce to better understand the landscape and to build new partnerships.
Indiana is at the epicenter of education reform in the United States. The 2013 state legislative session produced the boldest set of reforms in over two decades. The big ideas contained within these reforms seek to enhance classroom learning by infusing innovation and accountability. Hoosier parents now have unprecedented options to deliver their children to a school of their choosing.

Sagamore associate fellow Robert Enlow has been among the most influential voices in fueling Indiana’s reform agenda. From his perch at the foundation established by Milton and Rose Friedman, Enlow has generated a steady supply of intellectual stimulus for policymakers.

Yet, good policy is necessary but not sufficient. Good practice must follow and innovation comes from the bottom up not the top down. Such was the case when a group of neighbors from the Herron-Morton area of downtown Indianapolis began dreaming about transforming their neighborhood by starting a charter high school that would provide a classical liberal arts college preparatory education to local students, many of whom were low-income.

To make this possible, they needed a nationally recognized, highly credential school CEO with proven experience leading excellent schools. Enter Sagamore. Herron's founder Joanna Taft recruited Sagamore senior fellow Rex Bolinger to serve as the founding school leader. Formerly Indiana Principal of the Year, Bolinger fully utilized the charter school governing flexibility to recruit a highly talented team of educators and administrators such as his replacement, Janet McNeal.

National philanthropy such as the Walton Foundation invested in the Herron model, which placed 40% of its students in Advanced Placement courses (compared to the 25% state average) by its third year of operation. Newsweek magazine ranked Herron as one of the best high schools in America.

Since there are too few public schools of Herron’s quality, state legislators created the Indiana School Tax Credit Program to assist families whose financial constraints prevent them from gaining access to high performing schools. The program is administered by Scholarship Granting Organizations (SGO’s), which are responsible for collecting donations and awarding scholarships. Sagamore became an SGO in 2011 to serve children who deserve the best education available to them, the private schools who deliver great public benefit and the donors who desire for their philanthropy to close the achievement gap.

The tax credit program works like this: the state places $7.5 million worth of tax credits in a fund (note: this equals 0.001% of the state’s K-12 education budget); donors to the program qualify for a 50% state tax credit in addition to their normal federal tax deduction for the amount of their full donation; and Sagamore awards scholarships to eligible students.

In its first two years of operation, Sagamore awarded $2.8 million in scholarships to over 1,500 students who attended more than 100 different schools all across Indiana such as:

**Independence Academy of Indiana**: the only private school in the Great Lakes Region dedicated to the education and social development of children with autism and Asperger’s Syndrome.

**The Oaks Academy**: located in urban Indianapolis, over 70% of those enrolled qualify for federal or state assistance yet the school regularly achieves top tier results in standardized testing.

**Trinity School at Greenlawn**: the only Indiana school – public or private – to be awarded the U.S. Department of Education’s Blue Ribbon Award for Excellence in Education four times.

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#### Program Stats

**Families:**
- $1,759.63 = Average scholarship amount
- 1,059 students = Total number of recipients
- $41,648 = Average income of recipients
- 5 = Avg. Household size of scholarship recipients

**Donors:**
- 76 corporate and 660 individual donors
- 15% gave a gift of more than $10,000
- 44% gave a gift of more than $1,000
- 41% gave a gift of less than $1,000

**Indiana Schools:**
- 326 Accredited non-public schools in Indiana
- 58 Number of schools participating with SEC

*For the years 2012-2013

As of 11/23/2013
1. General Electric CEO Jeffrey Immelt was among the contributors to the American Outlook cover story honoring the centennial of Ronald Reagan’s birth. Related, Sagamore co-hosted two events—one at his alma mater, Eureka College, and the other at his ranch in California—depicting the influence of Reagan’s heartland youth on his presidential leadership.

2. Baylor University president Ken Starr delivered remarks on the U.S. Constitution at The Levey Mansion.

3. Sagamore hosted a conversation on transatlantic welfare reform featuring former Wisconsin Governor Tommy Thompson and British welfare chief Iain Duncan Smith at the National Press Club.


6. Former State Department official Jean Geran joined Sagamore in 2013 to launch a research portfolio aimed at the care and protection of vulnerable children in the developing world. Her particular emphasis will be a technology solution that creates a confidential identity package for orphaned and abandoned children to help them access education and employment.

7. Sagamore is home to the National Center for Complex Operations which seeks to enhance national security through low cost and high technology solutions for the military and homeland security partners.

8. Former Teach for America vice president Nicole Baker Fulgham has launched The Expectations Project to help close the education gap. The project is being launched in Indianapolis with Sagamore as a strategic partner.

9. John Miller addressed the inaugural President’s Club luncheon at Sagamore on his new book explaining how President Teddy Roosevelt saved the game of football. The event was part of Sagamore’s event series leading up to Indianapolis hosting the Super Bowl.
Jumoke Adegbamigbe, U. of Indianapolis
Tierney Beck, Covenant Christian H.S.
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Kate Camara, Taylor University
Wesley Cate, University of Indianapolis
Jordan Clark, Anderson University
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Brent Glass, Eureka College
Jonathan Haag, Grace College
Jaskaran Heir, University of Pennsylvania
David Christian Hines, Indiana University
Cameron Johnstone, Harvard College
Justin M. Lane, Anderson University
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Sarah McMains, University of Indianapolis
Emmanuel Mendez, Anderson University
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Daniel Owen, Marian University
Brian Platt, University of Indianapolis
David Pulliam, Taylor University
Mackenzie Scholte, Anderson University
Erin Sheek, DePauw University
Matthew Daniel Showalter, Indiana Univ.
Bryan Stephens, Indiana University
Chandler Swan, Indiana University
Katelyn Testerman, Heritage Christian H.S.
Timothy Thong, Singapore
Patrick Zeigler, Michigan State University
Jess Zimmerman, University of Illinois

Alexandra Cochrane is an Indianapolis native and graduate of Brebeuf Jesuit Preparatory School. She graduated from the College of William and Mary in Williamsburg, Virginia with a double major in Economics and International Relations with a Chinese language concentration. During the summer of 2006, Alexandra served as a Sagamore intern where her interest in China was piqued by Sagamore’s recently concluded collaboration with the Zhejiang Academy of Social Science (ZASS) of Zhejiang, China. This experience inspired Alexandra to spend the Fall 2008 semester studying at Peking University, one of China’s premier universities. Combining the knowledge acquired by her Sagamore and Peking University studies, Alexandra was awarded a research grant from William and Mary to study the economic and cultural relationships between Zhejiang’s capital city of Hangzhou and its sister cities in the United States: Indianapolis and Boston. Her research grant activities will be conducted in concert with Sagamore’s continuing economic development projects aimed at strengthening connections between Indiana and Zhejiang.
Senior Fellows

REX BOLINGER
JOANNA M. BROWN
DONALD CASSELL
ROLAND COLE

HARLAN DAY
ALAN W. DOWD
NICOLE BAKER
FULGHAM
JEAN GERAN

JUSTIN HEET
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BYRON JOHNSON
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JOHN E. WATERS
CHIP WEIANT
C.E. Crouse joined Sagamore as Chief Financial Officer in 2012 upon his retirement from the accounting and audit firm he co-founded in 1972. From its original headquarters in Greenwood, Indiana, Capin & Crouse has opened offices in Los Angeles, Colorado Springs, Atlanta, New York and multiple other cities in becoming one of the nation’s leading firms serving the nonprofit community.

Prior to his work at Capin & Crouse, C.E. served in the United States Army, making his leadership at Sagamore a return to public service. He is also chairman of the Asbury University Board of Trustees located in his native home of Wilmore, Kentucky. He received his degree in Accounting from the University of Kentucky.

“C.E. has served at the top of his profession for decades,” said Jay Hein. “His expertise in board governance combined with his accounting strengths have been invaluable tools in designing a new financial operations system at Sagamore. We’ll be building on the foundation C.E established for years to come.”
The following agencies hired Sagamore Institute for Research and Consulting Services since 2004:

- Acton Institute
- American Council on Germany
- American Inst. for Full Employment
- Association of Public Policy
- Ball State University
- Campus Crusade for Christ
- Carnegie Mellon University
- Cass County
- Chalmers Center for Economic Development
- Christian Community Development Association
- Christianity Today
- City of Hilliard
- City of Muncie
- Civil Society Project
- Community Corrections
- Community Solutions
- Compassion Coalition
- Connect Mexico
- Cornerstone Environmental
- Council for Economic Education
- Delaware County
- Educational Services, Inc.
- Fuller Theological Seminary
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- Greater Indianapolis Progress Committee
- Hamilton County
- Herron High School
- Huntington County United Econ. Development
- Indiana Economic Development Corporation
- Indiana Housing and Cmty. Development Assoc.
- Indiana Neighborhood Partnerships
- Indiana Office of Defense Development
- Indiana Private Industry Council
- Indiana State Department of Agriculture
- Indiana University
- Indiana University - Kokomo
- Indiana Wesleyan University
- Institute for Law & Justice
- IUPUI International Partnerships
- Jobs for Life
- Lawrence County
- Leadership Foundation of America
- Logansport-Cass County EDC
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- Mathematica Policy Research
- Memphis Leadership Foundation, Inc.
- Mission Increase Foundation
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- Peace Learning Center
- Praxis
- Purdue University
- Redeemer Presbyterian Church
- Shepherd Community
- South Korean Government
- State of Indiana FSSA
- StreetSchool Network, Inc.
- Team HOPE
- Trevecca Nazarene University
- Urban Youth Workers Institute
- U.S. Department of Health and Human Services
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- Women Doing Well
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