



ANNUAL REPORT

Sagamore Institute
FOR POLICY RESEARCH

2005/2006

PROSPECTUS 2007

WISE COUNSEL FOR A WORLD IN PROGRESS

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Welcome to the Sagamore Institute for Policy Research—a nonprofit, nonpartisan think tank headquartered in Indianapolis, Indiana. Sagamore Institute is committed to what is known as “applied research,” research that actually puts theories and ideas to the test in the real world by working alongside practitioners, learning from them, and measuring the results of theories put into practice—rather than simply hypothesizing from an ivory tower. We borrow our name from an Algonquin word used to designate someone who grapples with serious questions, builds consensus, and offers wisdom and advice. It is thus our intention to wrestle with hard issues, to be a meeting place for disparate groups, and to offer wise counsel for a world in progress.

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THE HONORABLE DANIEL R. COATS



MR. JERRY D. SEMLER, CLU

MESSAGE FROM THE CO-CHAIRMEN

Dear Friends and Supporters:

Founded in the spring of 2004, Sagamore Institute has quickly emerged as a leading force in public policy research and reform. As co-chairmen of Sagamore's Board of Trustees, we are proud of the accomplishments described on the following pages, and we are excited about what the future holds for this innovative organization.

This report is a snapshot of Sagamore's accomplishments in its first two full calendar years. As you will gather from this report, it has been a busy and productive time for the men and women of Sagamore. Although still in our infancy, we have already built an influential organization—an organization comprising talented researchers in fields as diverse as faith-based programs and foreign policy, immigration and international trade, community development and crime control. We have attracted a world-class board to match. In addition, we have forged a variety of strategic partnerships that have elevated our place in the field of public-policy research and advanced our mission.

Much of this success can be credited to Sagamore's founding president, Jay Hein, who recognized the need for a think tank based in the Heartland, but with a vision encompassing issues of local, national and international impact. Jay assembled a diverse and talented team and helped build Sagamore into national prominence. Indeed, one key indication of Sagamore's impact and influence on a national scale was Jay's appointment by President George W. Bush to serve as director of the White House Office of the Faith-Based and Community Initiatives in August 2006. In appointing Jay to lead this important office, President Bush called him "a champion of faith and community-based organizations."

Former U.S. Assistant Attorney General Deborah J. Daniels took the helm at Sagamore in late 2006. She is one of those rare people with a proven record of success in executive leadership, policymaking, research and fundraising—a person of the highest qualifications and character, a person who shares our vision for the programming and research that animates Sagamore Institute. With a background in policymaking at both the local and federal levels, she is the ideal person to head a national think tank based in America's Heartland. Deborah has a solid foundation on which to build. Just consider some of the headlines from our first two years:

- The Faith and Service Technical Education Network (FASTEN) program continued to set the standard in web-based learning for faith-based leaders. The FASTEN team, in partnership with Indiana University and other leading organizations from the world of philanthropy, provided a wealth of scholarship, answers and practical tools to thousands of faith-based and community organizations across the United States.
- Partnering with the Mexican Consulate in Indianapolis, Sagamore conducted a major study on the economic linkages between Mexico and Indiana.
- One of Sagamore's Senior Fellows played a central role in helping Indiana develop a strategic plan for its "Meth-Free Indiana" program.

In 2007, we have crafted a revised vision and mission statement, and have set forth the core beliefs that guide our work. In doing so, we have clarified our areas of concentration, focusing on research and analysis impacting the City of Indianapolis, the State of Indiana and the broader American and global communities. Of course, this report does not capture everything the men and women of the Sagamore Institute are doing in their many areas of expertise. To keep up to date, we invite you to visit www.sipr.org, to attend Sagamore events, and to join the hundreds of others who are already Sagamore supporters. Working with friends and partners like you, the Trustees, researchers and administrative staff of the Sagamore Institute for Policy Research are eager to build on the success of these first years.

Sincerely,

A handwritten signature in dark ink that reads "Daniel R. Coats".

The Honorable Daniel R. Coats
Co-Chairman of the Board of Trustees

A handwritten signature in dark ink that reads "Jerry D. Semler".

Mr. Jerry D. Semler, CLU
Co-Chairman of the Board of Trustees



MESSAGE FROM THE PRESIDENT

Dear Friends:

It is an honor to join the leadership team here at the Sagamore Institute for Policy Research. As you can gather from this report, the men and women of Sagamore Institute are doing important and influential work. I am excited about the opportunity to work with them in providing research and analysis that informs public discourse, and in serving as a meeting place for reasoned discussion of policy issues affecting Indianapolis and Indiana but also extending far beyond our borders.

This Annual Report describes Sagamore's first two years in detail. Allow me to share a few examples of how we plan to build on our accomplishments in the year ahead:

- Sagamore launched a research project in 2006 focusing on the effectiveness of faith-based organizations (FBOs) in Indiana, especially those involved in urban outreach and service. In 2007, related research will examine how Indiana FBOs are partnering effectively with government agencies to provide needed services.
- From 2005 to 2006, Sagamore researched the economic and cultural impacts of Mexico-Indiana relations, culminating in a major report in mid-2006, "Connecting Mexico and the Hoosier Heartland." Building on this project, we have been commissioned by the Lumina Foundation to conduct an 18-month study on the impact of Hispanic immigration on Indiana's workforce and higher education system. A similar line of research will examine performance data for Indiana's adult education system in light of statewide goals for workforce development.
- After signing a first-of-its-kind Memorandum of Understanding with the Zhejiang Academy of Social Sciences in China, we are planning a range of research and programming in 2007 to promote new Indiana-China trade opportunities and to celebrate the twentieth anniversary of Indiana's sister-state relationship with the Zhejiang Province.
- Having helped the State of Indiana to develop and unveil its "Meth-Free Indiana" initiative in 2005-2006, Sagamore researchers will assist in the creation of a new Indiana drug-control policy in 2007.
- We will expand on our previous work in education, engaging in critical education reform research to assist Indiana policymakers.

The year ahead will see enhanced concentration on crime suppression and reduction research, participating in the development of innovative initiatives in Indiana. In addition, we will engage in research on workforce development and economic development, including the effects of globalization on trade.

Here in the nation's Heartland, we 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.

As a former Assistant Attorney General with the U.S. Department of Justice, I know from experience that this is true. 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. That is why I believe that the work of Sagamore is of national significance, and that we have the opportunity to contribute in a meaningful way to some of the most critical policy debates of the 21st century.

I invite you to support us as we play an important and unique role here in the Heartland and beyond.

Sincerely,

Deborah J. Daniels
President

ABOUT SAGAMORE INSTITUTE FOR POLICY RESEARCH

OUR STORY

Born in the spring of 2004 and located in Indianapolis, Indiana, Sagamore Institute for Policy Research is a nonprofit, nonpartisan, public policy research organization. We provide independent and innovative research to policymakers, practitioners, and the public—we serve a world in progress.

Sagamore Institute conducts a range of public policy research and programming that includes work in civil society, faith-based interventions, crime prevention, education reform, welfare reform, workforce development, and trade issues. We intend to be the premier think tank in applied research—research that actually puts theories and ideas to the test in the real world by working alongside practitioners and learning from them, rather than simply hypothesizing from an ivory tower.

OUR MISSION

The mission of the Sagamore Institute for Policy Research is to provide high-quality, independent research and analysis, developing innovative and collaborative approaches to issues of public significance.

OUR VISION

The Sagamore Institute for Policy Research will be nationally recognized for having made substantive contributions to the quality of life of residents of Indianapolis and the State of Indiana, affecting as well the broader American and global communities.

OUR CORE BELIEFS

At the Sagamore Institute for Policy Research, our work is guided by our belief in:

- The dignity of all individuals.
- Individual liberty based on personal responsibility.
- Encouraging ingenuity and entrepreneurship.
- The power of volunteerism in American society.
- The valuable role of faith and faith-based organizations in public life.
- The importance of collaboration and synergy in achieving results.
- A pragmatic approach to government.
- The efficiency and fairness of a market economy.
- Positive outcomes as better achieved through incentives rather than mandates.

PROGRAM AREAS

Sagamore Institute's research portfolio comprises three broad, overlapping program areas: Domestic Policy, Civil Society, and Global Trade and America's Heartland. Each area has its own focus, although all of them reflect Sagamore's commitment to the sort of policy reform that empowers individuals, strengthens the institutions of civil society and promotes a freer, more prosperous world. Through these program areas and a distributed network of scholars and researchers, we will address in 2007 and beyond an array of topics, including:

- The role of faith-based charities in social services
- The nature of civil society
- "Venture philanthropy" and corporate citizenship
- The welfare state in transition
- Crime control and prevention
- Economic development
- Indiana's role in global trade
- Education reform in Indiana

“There is no member of our state's intellectual apparatus and policy generating forum that is more important than the Sagamore Institute for Policy Research.”

The Honorable Tim Goeglein,
Deputy Director of the White House Office of Public Liaison

DOMESTIC POLICY

Transforming Policy and Practice



Sagamore is proud to be based in America's Heartland. We believe public policy should serve the entire public—not just the policymakers in Washington, D.C. Yet we remain connected to key policymaking nodes across the country. From education reform to welfare reform, workforce development to crime control, Sagamore researchers rely on these connections to carry out a range of innovative programming and projects, drawing from frontline expertise in cities, nonprofit organizations and federal agencies to identify the best solutions.

EMPOWERING LOW-WAGE WORKERS

In the late 1990s and early 2000s, former Sagamore president Jay Hein and other researchers now based at Sagamore worked with reformers in Wisconsin and Washington, D.C., to help change the parameters of the welfare reform debate from “what if” to “how.” Today, Sagamore researchers are tackling the toughest question of all: “What’s next?” To answer that question, Sagamore partners with policymakers, service providers, foundations, and associations to craft better public policy, improve the delivery of government services, and strengthen ties between government, communities, and the private sector.

Thanks to a two-year grant from the Charles Stewart Mott Foundation, Senior Fellow April Kaplan and other researchers identify, examine, and analyze employer-based models that expand participation of low-wage workers in work-support programs—programs that help these workers break free from public assistance and build their own careers. Much of this work will also be used to develop the comprehensive ex-offender reentry efforts Sagamore will support and evaluate in 2007 and beyond.

ARKANSAS EVALUATION

While with Sagamore, Hein provided strategic counsel to former Arkansas Governor Mike Huckabee in his efforts to become the leading implementer of the Bush Administration's compassionate conservative agenda—an agenda that enfolded welfare reform, expands cooperation between government and faith-based organizations, and addresses marriage and abstinence issues. Toward that end, Sagamore Institute conducted a fiscal review for the state of Arkansas and created a strategy document on how state governments can partner with the U.S. Department of Health and Human Services (HHS) on faith-based efforts.

EXPORTING REFORM

When the government of Jamaica decided to launch much-needed welfare and employment-service reforms, it recruited Sagamore Institute to facilitate site visits in the U.S. and assist in the design of an appropriate set of reform strategies, including poverty eradication, micro-enterprise development, youth training, and employment. Sagamore Institute researchers led Jamaican government officials on a tour of successful U.S. states and helped officials implement these best practices in Jamaica.

EDUCATION REFORM

America needs an educated workforce, and that workforce grows in America's Heartland. A high school diploma is simply not enough for students to succeed in today's economy, let alone tomorrow's. That's why Sagamore Institute strives to support a "learning continuum" that enfolds traditional education, workforce development and lifelong learning—and equips Americans of all ages with the skills they need to push open the door to a future full of opportunity.

This all begins with a new understanding of "formal education," which can no longer be limited to 12 grades. As CEO of one of Indiana's newest charter schools, Herron High School, Senior Fellow Rex Bolinger is working to change old ideas about education and create a learning environment that prepares Indiana's young people to compete and excel in college and beyond. Rooted in a strong classical liberal arts education, Herron High School provides students with an early-college experience in a research-based, data-driven environment. Bolinger has even forged a partnership with Marian College to open the door for Herron students to take college courses while still in high school. Herron High School was also selected to join a three-year national study of charter schools led by the Hoover Institution. Thanks to this partnership, Herron High School will become a "laboratory-school" for Bolinger's research and longitudinal studies at Sagamore.

To sustain this learning continuum, we also believe that higher education costs must be brought under control, and higher education opportunities expanded. The Lumina Foundation for Education shares this belief and asked Sagamore Institute to identify how innovative organizations and locales are controlling the spiraling costs of college education.

FIGHTING CRIME IN INDIANA

Thanks in part to Sagamore's efforts, Indiana stands as a leader in the fight against methamphetamine production and usage. In partnership with Drug Free Indiana and the Indiana Criminal Justice Institute, Senior Fellow Colleen Copple led a summit in May 2006 that unveiled the state's Meth-Free Indiana plan.

Sagamore also played an important role in the Midwestern Governors Association Regional Methamphetamine Summit in December 2005, which was hosted by the State of Indiana. In collaboration with the Indiana Criminal Justice Institute, Copple provided state officials with technical support in summit planning, including development of a workbook for participants. These workbooks served to refine post-summit conclusions on policies and programs that state, regional, and federal entities need to carry out in order to stanch the manufacture and sale of methamphetamine.

The Indiana Criminal Justice Institute partnered with Sagamore on the anti-meth efforts in 2006 and on Sagamore's Executive Session of Criminal Justice Professionals in March 2005. This Ideas in Indiana conference featured a keynote address by the Honorable Deborah J. Daniels, the former Assistant Attorney General for the U.S. Department of Justice's Office of Justice Programs who later became President of Sagamore Institute. During the program, which brought together law enforcement officials, policymakers, and grassroots leaders, Daniels discussed Indiana's contribution to law enforcement innovation and identified some of the funding challenges facing local law enforcement.

In 2007, Sagamore expects to engage in a broader range of crime prevention research, including work on ex-offender reentry efforts in Indiana that may serve as models for the rest of the nation.

MARRIAGE IN CENTRAL INDIANA

With the help of Sagamore Institute, the Central Indiana Healthy Marriage Initiative (CIHMI) conducted the first-ever baseline survey of attitudes and behaviors of Indianapolis-area residents related to marriage, divorce and family formation. Under the direction of Associate Fellow Tim Gardner, the Indiana University Public Opinion Laboratory conducted the survey and compiled data results. Gardner authored the final study, which is available at www.sipr.org. Among the findings, according to Gardner, are that “Central Indiana is a marrying place and a divorcing place.” Such findings were surprising and of interest to Indiana policymakers. State Representative Cindy Noe, for instance, praised Sagamore for its work in the field, noting that “Good, functioning, healthy marriages are the key to solving many public-policy challenges.”

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healthy marriages
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challenges.



DISASTER RELIEF RESEARCH

One of the most pressing national news stories of 2005 was the outbreak of killer hurricanes that hit the State of Florida. As a result of these disasters, Governor Jeb Bush established the Florida Hurricane Relief Fund, administered by the Volunteer Florida Foundation. The sheer size of post-disaster relief gifts created tremendous management challenges and opportunities for the Volunteer Florida Foundation, which turned to Sagamore Institute to evaluate Florida’s response to the devastating hurricanes. The lessons learned from this exercise will be invaluable in future responses to disasters of all kinds, anywhere in the United States or in other parts of the world.

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Sagamore Institute researchers Scott Truex and Lenore Ealy took a grassroots approach to addressing this catastrophe, leading a team of experts in economic development, philanthropy, and land design on their evaluation. The Foundation asked Sagamore Institute to evaluate the effectiveness of its programs and identify areas where the Foundation can be even more efficient and effective in future years when similar needs arise. Sagamore Institute examined three main areas:

MATERIAL NEEDS EFFECTIVENESS

The project aided the Foundation in assessing whether disbursements of the initial relief phases were targeted as strategically as possible and whether recipients were effective in their use of the funds.

UNMET NEEDS COMMITTEE REVIEW

The project investigated the role of local agencies and community resources in understanding the unique needs of counties in contributing to the rebuilding process. Sagamore Institute researchers also made recommendations as to how the relief fund may partner with other research and philanthropic institutions to ensure that in-depth research and analysis will be conducted about the role played by civil-society infrastructures in facilitating or hindering effective and timely response to immediate and long-term needs.

RECOMMENDATIONS FOR THE FUTURE

Ealy and Truex identified ways to make fund usage in follow-up phases more effective and more efficient.



INDIANA SECRETARY OF STATE TODD ROKITA / JAY HEIN / CONGRESSMAN LEE HAMILTON

ELECTION REFORM

Election reform and infrastructure improvements are critical issues in the post-2000 election era. Much progress has been made in these areas, but much more remains to be done. To discuss next steps, Sagamore Institute brought together former Congressman Lee Hamilton, Indiana Secretary of State Todd Rokita and state and local officials on October 6, 2005. Hamilton shared his insights as a member of the Commission on Federal Election Reform, while Rokita talked about how the state has already implemented many of the Commission's recommendations. Among the recommendations Hamilton outlined were:

- Implementation of uniform voter-registration systems
- Consistent use of voter ID cards
- State-to-state registration "interoperability"
- Better maintenance of voter lists
- Special care for military and overseas ballots
- Re-enfranchisement of ex-felons
- More responsible handling and release of exit-polling data

Programs like this help improve the health of our representative democracy, and Sagamore Institute is proud to play a part in this important work. To read a transcript of the event, visit www.sipr.org.

NATIONAL POLICY INSIGHTS

Thanks to his role on Sagamore Institute's Board of Trustees, the Honorable Dan Coats remains active in Indiana's public life, while continuing his involvement on the national stage. For instance, Senator Coats published a series of essays on the German elections of 2005, paving the way for interviews with media outlets from Indianapolis to Berlin. Here at home, Sagamore Institute coordinated the Ambassador's return to Indiana in September 2006 for a presentation on his experiences as the White House's congressional liaison for the U.S. Supreme Court nominations of Samuel Alito and Harriet Miers. The event was cosponsored by Sagamore and the Indiana University School of Law.

Senior Fellow Alan Dowd's commentary reaches a national audience. In fact, since Sagamore Institute's founding, Dowd has published more than 100 articles, including commentaries on U.S. policy and politics in *The Wall Street Journal Europe*, *The Baltimore Sun*, *The Washington Examiner*, *National Review Online*, *American Enterprise Online*, *The Weekly Standard Online* and *TCSDaily*; feature pieces for *The Journal of Diplomacy & International Relations* and *Parameters*; and cover stories for *The American Legion Magazine*, *American Outlook* and *The American Enterprise*.

A low-angle, upward-looking photograph of a city street. Several tall buildings frame the central sky. On the left, a light-colored building with many windows rises vertically. On the right, a darker, more modern building with a grid of windows is visible. In the lower right, a construction site with a crane and scaffolding is partially seen. The sky is bright blue with scattered white clouds. The text 'CIVIL SOCIETY' is overlaid in the upper right quadrant.

CIVIL SOCIETY

Transforming communities through faith-based action.

Strengthening civil society—that amorphous zone of space which buffers the individual from the state—is a primary mission of Sagamore. Our commitment to growing civil society is showcased best in our research on community- and faith-based organizations (FBOs). Collaborating with agencies from Capitol Hill to City Hall, Sagamore’s Center on Faith in Communities educates policymakers and practitioners on how to reintegrate FBOs into the panoply of programs designed to help those in need; offers an array of research and grassroots training; and provides the best in web-based learning for faith-based leaders.

In August 2006, President George W. Bush appointed Hein to serve as Director of the White House Office of the Faith-Based and Community Initiatives. “Jay has long been a leading voice for compassionate conservatism and a champion of faith and community-based organizations,” President Bush declared in naming Hein to this key position. “By joining my administration, he will help ensure that these organizations receive a warm welcome as government’s partner in serving our American neighbors in need,” the President added.

Hein and the rest of Sagamore’s executive leadership immediately recognized that his appointment was a reflection not only of his innovative leadership, but also of Sagamore’s success in the field of public policy research, especially faith-based interventions and civil-society research. In fact, Hein says the White House invited him to join the President’s team while he was helping the administration work through new ideas and strategies for the faith-based program. As Sagamore Co-Chairman Jerry Semler observed, “When you carry out research and programming like Sagamore, research that is innovative and influential, people are going to take notice.”

Given the contributions Hein, Senior Fellows Amy Sherman and Don Eberly, and other civil-society researchers have made to public-policy reform in recent years, it’s no surprise that Washington took notice of Sagamore’s work.

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FASTEN

Sagamore Institute administers one of America's most comprehensive and informative faith-based service tools, the Faith and Service Technical Education Network's (FASTEN) award-winning website.

FASTEN is a collaborative effort involving researchers from Sagamore Institute, the Center on Philanthropy at Indiana University, Baylor University's School of Social Work, Harvard University's Hauser Center for Nonprofit Organizations, and the National Crime Prevention Council's Center for Faith and Service. FASTEN's goal is to assist and equip faith-based organizations (FBOs) in providing social services. Under Sherman's direction, the FASTEN website equips faith-based practitioners, private philanthropies, and public administrators with the resources, information, and tools they need to be successful. Thanks to Sagamore, FASTEN provides the best in web-based learning for faith-based leaders.

An initiative of Pew Charitable Trusts, FASTEN actively identifies best practices in faith-based services and multi-sector collaboration and produces and disseminates educational materials for practitioners in the public and private sectors. The website features practical tools, including how-to guides, curriculum reviews, tutorials, book summaries, and profiles of effective models; a peer-to-peer learning community; and up-to-date information on best practices. The FASTEN website boasts 13,000 average monthly visitors, and the site's toolkits have been downloaded nearly 20,000 times. These toolkits help FBOs carry out their unique missions all across the country, including in Indiana.



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To learn more about FASTEN, visit their award-winning website: www.fastennetwork.org

Sherman also leads FASTEN's Partners in Transformation (PiT) awards program. The 2005 PiT awards recognized effective examples of collaboration between faith-based groups and the public sector in tackling social problems. In the wake of Hurricane Katrina, the 2006 awards focused on three timely topics: emergency disaster response, long-term community recovery, and services to "deep pockets" of poverty. The 2005 and 2006 PiT reports are available at www.sipr.org.

According to Sherman, "Information provided by PiT applicants offers a rich pool of data about the services FBOs are providing, with whom they are partnering, how many people they are reaching, what their accomplishments have been, and what promising practices they have employed that could be replicated elsewhere." Through the competition, Sherman's team has discovered that FBOs are not only collaborating with large social-service agencies, but with police, public schools, private businesses, hospitals, prisons, civic groups, banks, and secular non-profits.

CENTER ON FAITH IN COMMUNITIES

In addition to her work with FASTEN, Sherman serves as director of Sagamore Institute's Center on Faith in Communities (CFIC). CFIC seeks to equip and encourage faith-based organizations in developing and implementing effective programs that build strong local communities.

CFIC's applied research methodology uncovers "what's working and why" at the grassroots level and then communicates those lessons to both policymakers and practitioners. CFIC also champions the efforts of creative "street saints," publicizing their achievements and offering them training and technical assistance to build their capacity for expanding their good work.



As an outgrowth of her work with FASTEN and CFIC, Sherman and her team encourage the development of new faith-based initiatives through an extensive schedule of public speaking and by producing original articles, case studies, and project profiles of effective programs to facilitate their replication.

In 2007, CFIC is providing leadership nationally and locally on the Economic Literacy Education: Vital Assets for Transformation and Empowerment (or ele: Vate) project, which is an initiative to train urban ministry leaders working with youth to implement financial life skills and youth entrepreneurship educational programs. The multi-city project relies on a virtual economy that allows young people to earn, save, manage a personal on-line savings account and checking account, handle a credit card, buy and sell stock, and purchase goods through an on-line store. CFIC is carrying out training programs, developing curricula, and providing technical assistance.

IMPLEMENTING CHARITABLE CHOICE

Sherman is widely recognized as the leading researcher on the implementation of Charitable Choice, which is the general name for several programs President Bill Clinton signed into law that allow certain federal agencies to use faith-based groups as service subcontractors. Some see Charitable Choice as protection for faith-based organizations that receive government contracts. Others see Charitable Choice as a crack in the wall separating church and state. But Charitable Choice is much more than a point for debate. It is a program that works. Prior to Sagamore's inception, Sherman oversaw a two-part research project looking at the implementation of Charitable Choice in 15 states and at how the relationship between government and the faith-based contractors was faring. Sherman's *Charitable Choice Catalogue* described 700+ examples of government contracting, analyzing grant and contract size, characteristics of contractors, and the most common services provided. Her *Fruitful Collaboration: A Survey of Government-Funded, Faith-Based Programs in 15 States* explored how government-faith collaboration unfolded, what contractors' experience with government regulation was, and how faith-based organizations sought to guard clients' civil liberties while also remaining true to their faith-based character.

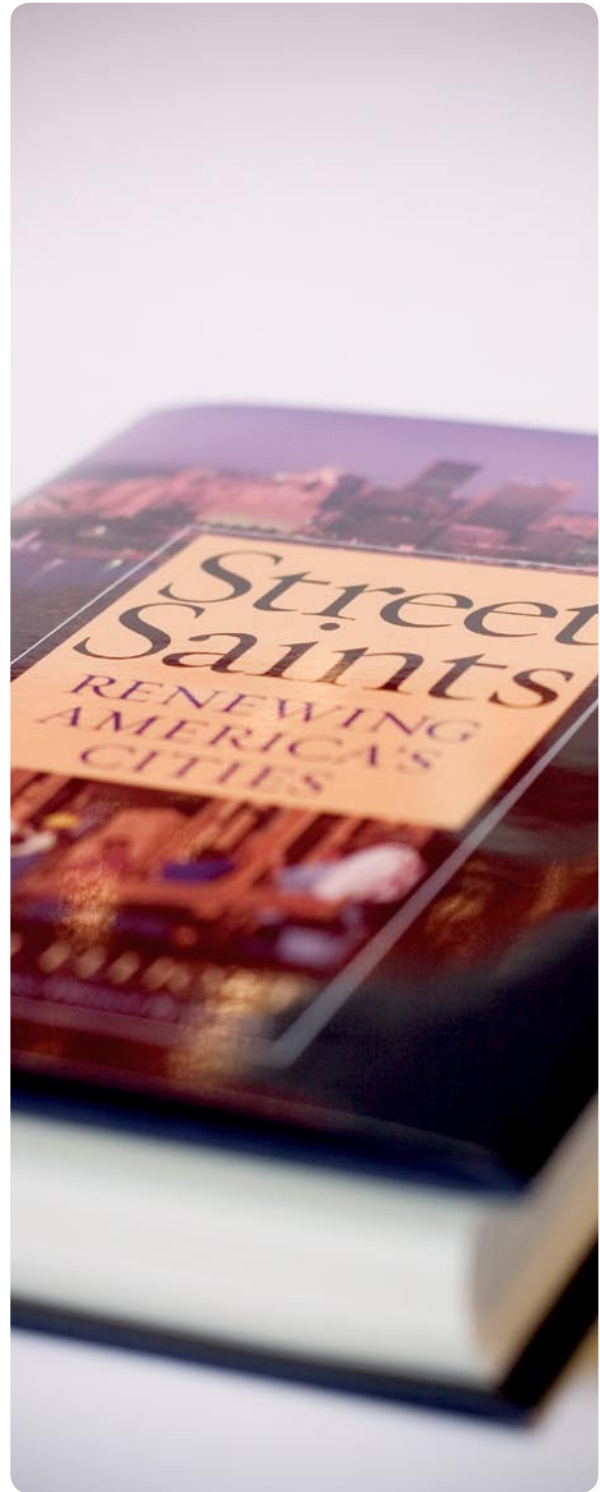
In short, Sherman's research shines a light on the effectiveness of this collaboration between government agencies and faith-based groups. In fact, so impressive was her survey of Charitable Choice implementation in 15 states that the Assistant Secretary for Planning and Evaluation at HHS commissioned a 50-state survey building on Sherman's data. Sagamore Institute researchers contributed to this research as well as to the design of new training that federal officials offer to state and local government leaders charged with administering government-faith partnerships.

STREET SAINTS

Written by Associate Fellow Barbara Elliott and with a forward by Sagamore Co-chair Dan Coats, *Street Saints* is both a book and a guide to giving. Published by Templeton Foundation Press, the book takes readers through the streets of America's cities, including Indianapolis, to meet people of faith who are renewing America, one heart at a time. These unsung heroes put an arm around abused grade-schoolers and teach them to read, face down drug dealers, and give hope to bullet-pocked neighborhoods. They work creatively as social entrepreneurs, turning gang members into computer programmers, and equipping former drug addicts with job and life skills. "They are touching the least, the last, and the lost with love," according to Elliott. "And they are discovering that the transformation is mutual."

The product of eight years of hands-on experience with grassroots practitioners and more than 300 interviews, *Street Saints* has been a smashing success. By 2005, *Street Saints* had jumped to #7 on Amazon's list for books on philanthropy and charity. Elliott visited dozens of cities all across the nation; reached approximately 53 million radio and TV audience members; was featured on CSPAN; and was mentioned in scores of newspapers and magazines, including the *Houston Chronicle*, *Philadelphia Daily News*, *World*, and *Christianity Today*. During the book tour, Elliott spoke to the Philadelphia Society, Heritage Foundation, Philanthropy Roundtable, Hillsdale College, Leadership Foundations of America, Milwaukee Donors Forum, the Bradley Center for Philanthropy and Civil Society at Hudson Institute, and of course, Sagamore Institute for Policy Research.

Elliott keynoted an Ideas in Indiana forum, which examined the growing role that small groups such as community non-profits and faith-based organizations play in inner-city renewal.



COMMUNITY-BUILDING AND VENTURE PHILANTHROPY

After serving with distinction in the Bush administration, Eberly joined Sagamore Institute as a Senior Fellow in 2005. Thanks to support from the Lynde and Harry Bradley Foundation, Eberly researches and writes books about the global rise of civil society and about the role civil society can and should play in community- and nation-building.

Eberly's career includes a decade serving in senior policy positions in Washington, in Congress and under two administrations. He has been an ardent advocate of creating non-profit organizations to strengthen community and civic life. Eberly's influence stretches internationally as well. He has spoken around the world and has authored a book on civil society in the 21st century, which has been translated into Arabic by the State Department and has been widely circulated in the Middle East. Eberly has authored or co-authored eight books on community, culture, and civil society.

While at Sagamore Institute, Eberly's main focus is his book on the rise of global civil society as a factor in community-building and nation-building in the 21st century, *Building Communities and Nations from the Bottom Up: The Rise of Global Democratic Civil Society*. Eberly has also participated in Sagamore Institute's general policy work, focusing particularly on shaping an agenda for building citizenship and community at home and abroad through writings and consultation.

In 2007, Eberly will assist Sagamore with work on "venture philanthropy" and the growing role of corporations in community-building.

AMERICAN OUTLOOK COVER STORY

American Outlook magazine featured four members of the Sagamore Institute family in its late 2004 issue devoted to "Exporting Civil Society." Senator Coats commented on the divide between the U.S. and Europe over issues of faith in the public square. Dowd argued that the Bush administration's Millennium Challenge Account program could strengthen civil society around the globe. Elliott compared the differing approaches to social problems taken by the United States and Germany. And Sherman described the effectiveness of government collaboration with faith-based organizations.

CONVERSATIONS ON PHILANTHROPY

Associate Fellow Lenore Ealy is the editor of *Conversations on Philanthropy*, an occasional series of books about the ways and means of philanthropy in a free society, published by the Project for New Philanthropy Studies at DonorsTrust.

The first volume, "Conceptual Foundations," was published in December 2004. It features analysis and essays by an interdisciplinary panel of distinguished authors, including Professor David L. Prychitko of Northern Michigan University and Professor Peter J. Boettke of George Mason University. The second volume, "New Paradigms," was published in July 2005, featuring essays by Dr. Richard Gunderman, Frederick Turner, Tyler Cowen, Amy Kass, and others. A third volume, "Philanthropic Transformations," was published in September 2006, examining the field of microfinance with essays and commentaries by Heather Wood Ion, Emily Chamlee-Wright, Alejandro Chafuen, Jeffrey Ashe, and other thinkers.

Sagamore Institute has convened Ideas in Indiana roundtables after publication of the books. The discussions have been held at Sagamore Institute's headquarters in Indianapolis, with Ealy serving as moderator and Sagamore researchers, series authors, and members of Indiana's thriving philanthropic community serving as panelists.



GLOBAL TRADE & AMERICA'S HEARTLAND

Transforming trade and understanding globalization.

Indianapolis is a global crossroads, and Sagamore sits at the very center of this crossroads, providing our researchers with the opportunity to study the phenomenon of globalization—and to position Indiana communities, businesses and citizens to benefit from it. Toward that end, Sagamore is identifying the opportunities and challenges of immigration, and partnering with government officials and business organizations in Asia to promote trade, investment and jobs for Hoosiers and America's Heartland.

SOUTH KOREAN VISITING FELLOWS PROGRAM

Through our partnership with the South Korean Ministry of Commerce, Industry and Energy (MOCIE), Sagamore Institute brings Korean policymakers to Indianapolis for multi-year research fellowships; we have already welcomed two Visiting Fellows from MOCIE.

From 2004 to 2005, Dong Hyung Cha worked with Senior Fellow John Clark on a research portfolio focusing on trade and commerce. They explored the impact of free-trade agreements on the economies of South Korea and other countries in Asia. MOCIE also helped underwrite a symposium of policymakers and analysts that examined some of these issues.

Sagamore Institute's second and current MOCIE Fellow is Keonki Roh. Like his predecessor, Roh works closely with Clark on issues of trade, energy security, and energy consumption. He has met on multiple occasions with Indiana government officials to compare notes and provide insights ahead of the Indiana Governor's trade missions to Asia. In 2006, Roh led an in-depth presentation on the impact of the Chinese economy on the global economy. In addition, he continues to carry out research into energy supply, the growth of China's economy and free trade agreements.

THE INDIANA-JAPAN PARTNERSHIP

In 2005 and 2006, Senior Fellow Larry Ingraham researched and developed a Sagamore Policy Paper on the rich history of Japanese investment in Indiana. "The Indiana-Japan Partnership: Telling the Story" documents how the first wave of Japanese investment came to Indiana during the years 1983-1988, why other waves followed and how the Indiana-Japan relationship has transformed the state. The report was unveiled at an Ideas in Indiana event keynoted by the Honorable John Mutz (former Lt. Governor of Indiana) and attended by officials from the Indiana Economic Development Corporation, Indiana Manufacturers Association, Columbus Economic Development Board and Purdue University. During the program, Lt. Governor Mutz praised Sagamore Institute for its leadership in continuing former Indiana Governor Robert Orr's legacy of connecting Indiana and the world. This report is available under the "Articles" section at www.sipr.org.

CONNECTING MEXICO AND THE HOOSIER HEARTLAND

When the Mexican Consulate in Indianapolis approached Sagamore Institute in 2005 to discuss the pressing need for a clearer picture of the linkages between Mexico and Indiana, we wanted to produce something that business leaders, policymakers, civic groups, and communities in Mexico and Indiana could use to promote economic growth and cultural understanding. And we recognized that a shortage of good information and an abundance of inaccurate information are perhaps the most fundamental and formidable obstacles to any enduring, mutually enriching Mexico-Indiana partnership.

Building on the work of similar studies in states as disparate as Utah, Arizona, and North Carolina, Clark and Associate Fellow Justin Heet developed a report to remove these obstacles—or at least begin the process of removing them. As the project broke ground in 2005, Clark and Heet began to see a fascinating and complex picture of Indiana's importance to Mexico, Mexico's importance to Indiana, and their growing dependence on each other.

The study, which was completed in July 2006, would not have been possible without the leadership of Sagamore Trustee Sergio Aguilera, who previously served as Consul of Mexico in Indianapolis. To read the full report, please visit www.sipr.org.



JAY HEIN IN ZHEJIANG

INDIANA AND ZHEJIANG

In mid-2006, Sagamore forged a formal partnership with the Zhejiang Academy of Social Sciences (ZASS) of China. Indiana has a sister-state relationship with Zhejiang Province, and in an effort to deepen that relationship, Sagamore signed a Memorandum of Understanding with ZASS to pave the way for joint projects. ZASS had never before signed such a formal institution-to-institution agreement. Major goals of the partnership include increasing Indiana's understanding of the Chinese economy generally and Zhejiang specifically, increasing Zhejiang's understanding of the Indiana economy, identifying specific industries and businesses that would benefit from new trade and investment with their Indiana and Zhejiang counterparts, and developing concrete business opportunities in the near term. In late 2006, ZASS officials visited Sagamore to continue building the partnership.

SAGAMORE HIGHLIGHTS

Sagamore Institute has shown tremendous growth in the areas of publications and events.

IDEAS IN INDIANA SERIES

We believe that innovation and positive change only occur when the best ideas join with leaders who can put them into practice. Connecting the right ideas to the right leaders at the right time is no easy task, which is why Sagamore Institute strives to be a meeting place for public-policy innovators and reformers. The Ideas in Indiana series serves as the vehicle for this important convening role at Sagamore Institute.

In our first two-plus years, we have convened Ideas in Indiana conferences featuring Presidential advisor Tim Goeglein discussing the war on terror; former U.S. Assistant Attorney General Deborah Daniels discussing criminal-justice collaboration among community, state, and federal agencies; former Congressman Lee Hamilton and Indiana Secretary of State Todd Rokita on electoral reform; Senator (and Sagamore Co-chair) Dan Coats on the Supreme Court nomination process; the Honorable John Mutz on Indiana-Japan trade; the Mexican Ambassador to the United States on U.S.-Mexico relations; Mexican Consul (and Sagamore Trustee) Sergio Aguilera on Mexican immigration into Indiana; the Mayor of Cologne, Germany, on trade and development; nationally syndicated columnist Deroy Murdock discussing the war on terror; experts from the Pacific Research Institute on healthcare reform; and programs on U.S.-EU relations, energy security, philanthropy, civil society, community development, and education reform featuring our own senior researchers.

For a full listing of our Ideas in Indiana events, please visit www.sipr.org.



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change only occur when
the best ideas join with
leaders who can put
them into practice.

PUBLICATIONS

Sagamore Institute’s researchers published 180 articles in 2005 and 2006. All told, their work has been featured in more than thirty magazines, journals and newspapers, including:

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<i>Books & Culture</i>	<i>TCS Daily</i>
<i>Christianity Today</i>	<i>The American Enterprise</i>
<i>Economic Affairs</i>	<i>The American Enterprise Online</i>
<i>Enrichment Journal</i>	<i>The American Legion Magazine</i>
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<i>FrontPage Magazine</i>	<i>The Indianapolis Star</i>
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<i>Islamic Horizons</i>	<i>The Public Interest</i>
<i>National Review Online</i>	<i>The Wall Street Journal Europe</i>
<i>Parameters</i>	<i>The Weekly Standard</i>
<i>Philadelphia Daily News</i>	<i>The Weekly Standard Online</i>
<i>Sociology Inquiry</i>	<i>The Washington Examiner</i>
<i>Sojourners</i>	<i>The National Interest</i>
<i>Symbolic Interaction</i>	<i>World</i>

.....

Sagamore Institute researchers and Associate Fellows also have published four books. In addition, we launched our first issue of the electronic newsletter *ProgressReport* on June 28, 2004, with 800 subscribers. By 2006, each issue of *ProgressReport* was reaching over 2,400 subscribers.



SAGAMORE INSTITUTE SUPPORTERS

2004-2006

We are most grateful to our donors who demonstrate outstanding stewardship through their annual financial contributions. We wish to thank the following individuals, companies and foundations for their very generous support through gifts made between June 2004 and December 2006.

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REVENUE

Individual and Corporate Donations	222,068
Foundation and Organizational Grants	1,609,803
Government and Agency Grants and Awards	1,544,897
Temporarily Restricted Grants*	725,000
Other	16,178
	4,117,946

EXPENSES

Direct Research Expense	2,455,321
Indirect Research Expense	538,028
Research Support and Fund Raising	862,718
	3,856,067
Excess of Revenue over Expenses	261,879
Net Assets as of December 31, 2006	261,879

Fiscal year ends December 31, 2006.

*Future obligations for completion of projects and programs are associated with temporarily restricted grants.

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