An Invitation

The Aspen Institute invites you to join a small group of peers from the Greater Washington, DC metropolitan area for a unique and meaningful exploration of values and the purpose of philanthropy. The workshop will focus on the underlying values that engage donors and the strategies that will best advance their goals. This workshop is designed to meet participants’ desire for results and a philanthropic community in a no-fundraising environment.

Beginning in October 2010, and meeting regularly through May 2011, the Aspen Philanthropy Strategy and Values Workshop – Washington, DC will convene a small group of philanthropists seeking:

• A community of peers,
• Opportunities to explore ways that philanthropic giving can lend meaning to one’s life, and
• Strategies for effecting real change in the world.
BACKGROUND
In recent years, there has been an explosion in the number of philanthropic institutions in the United States. Much of this growth has been fueled by small foundations and donor advised funds where there is significant family involvement. According to the Foundation Center, approximately 75,000 foundations operate in the United States, more than half of which are family foundations. Family foundations provide nearly $18.5 billion in annual giving. Decisions by these foundations are often made by founding donors, colleagues and family members. During the next decade, this donor community will play an increasingly important role addressing a wide range of challenges facing communities, this nation and countries around the world.

Even as their number and influence grow, most donors and trustees report feeling isolated and disconnected from philanthropic peers, from credible resources and knowledge, and from a networked community. Associations and learning opportunities for professional grantmakers thrive, but individual donors and philanthropic decision-makers find comparatively few occasions to come together in a neutral setting to explore issues unique to their roles.

Overview
The Aspen Philanthropy Strategy and Values Workshop – Washington, DC will convene 15-20 individual donors and foundation trustees (non-staff) from Greater Washington, DC over the course of an academic year, for five interdependent learning opportunities. The workshop’s guiding questions will include:

• What values are most important in my life? How do I balance competing values in my philanthropy?
• How does my giving reflect my values? What difference will my giving make?
• How can my giving be most effective, creative and strategic? How can I learn from others—and avoid others’ mistakes?
• What are the cutting-edge strategies and approaches being applied by donors to society’s most challenging problems?
• How does (or can) a donor know if he or she has been truly effective?

Participants will be offered a curriculum of contemporary and classical readings that will stir values-based reflection and critical thinking. This integrative approach will combine case studies, participant experience and expert guidance. The Aspen Institute Philanthropy Strategy and Values Workshop – Washington, DC is neither a giving circle nor a pooled giving program. Instead, it seeks to refine and put into action individual philanthropic plans using a framework based upon values and strategy.

In advance of the program’s opening session, participants will be encouraged to identify a specific challenge or decision they are facing regarding their philanthropy. Over the course of the program, participants will develop a strategy for addressing this challenge. Participants will leave the experience with greater insight and a plan for strategic action.

Finally, the Aspen Philanthropy Workshop is a “fundraising/sales free” zone. We will create a safe space for participants to discuss their experiences, challenges and aspirations—without the intrusion of grantseekers or other solicitations.

Who should participate?
The Aspen Philanthropy Strategy and Values Workshop invites principals and decision-makers (non-staff) of family/private foundations, as well as individual donors giving through advised funds, community foundations and less formalized vehicles. Participants will reside, at least part-time, in the Washington, DC metropolitan area, but may give both here and elsewhere. Donors engaged in social entrepreneurship, social venture philanthropy and other strategies are encouraged to attend. In keeping with Aspen Institute tradition, all sessions and discussions will be informal and off-the-record. The workshop will help donors wishing to:

• Reconnect with the underlying values that make philanthropy meaningful and rewarding;
• Craft or refine a philanthropic mission and strategy;
• Design a new, more creative or strategic giving program;
• Assess structural issues related to perpetuity, spend-down, and “next-generation” issues;
• Delve deeply into case studies to explore effectiveness and impact; and,
• Connect, share and learn with philanthropic peers.

If you have a question about whether the workshop will fit your interests and role, please do not hesitate to contact Cinthia Schuman Ottinger at (202) 736-5811 or cschuman@aspeninstitute.org.
A Brief History

The Aspen Philanthropy Workshop – Greater Washington, DC joins a growing number of leadership programs of the Aspen Institute. The “Aspen Experience” is based on a Socratic learning method that includes classic and modern reading materials and an interactive approach that transforms thinking.

With a long history of spurring values-based dialogue and critical thinking among world leaders, the Aspen Institute offers unparalleled credibility as a convener. Countless leaders, from CNN’s Wolf Blitzer to Estee Lauder’s Leonard Lauder, have taken Aspen Institute programs and found that it has changed their lives, offering participants an opportunity to step out of their daily activities, and into the world of great ideas and superb exchange with one’s peers. Many Aspen programs take the notion one step further: to inspire and promote actions to solve today’s most entrenched challenges.

The Aspen Institute’s Program on Philanthropy and Social Innovation is uniquely qualified to provide donors and foundation trustees with a safe, intellectually stimulating and meaningful exploration of philanthropy. Supported by America’s foremost foundations, the program seeks to inform and maximize the impact of these social sector actors through leadership development initiatives, convenings, and communications so that each can contribute to the good society at home and abroad.

One constant stands behind everything the Institute does: our core mission is to foster enlightened leadership, the appreciation of timeless values, and the ability to pursue common ground with fellow citizens while remaining true to basic ideals.

Workshop Schedule

To help foster connections among the group and ensure a successful program, we ask participants to make a commitment to attend all sessions and activities associated with the workshop. We also ask that participants prepare for sessions beforehand by reading materials provided and, by the end of the workshop, developing a brief strategic plan of action that addresses a major challenge or area in need of focus.

Detailed agendas for the workshop’s gatherings will be mailed in advance of each session, and will include specific meeting goals and themes, reading materials and speaker biographies. Sessions will offer a mixture of dialogue on values and internal motivations, a focus on skills and best practices, opportunities to enjoy the company of fellow participants and focused counsel regarding each participant’s major philanthropic challenge.

The program will kick off with an overnight retreat in the quietude of the Aspen Institute’s Wye River Conference Center. A short drive from Washington DC, the Eastern Shore’s natural habitat will offer escape from your routine and freedom to focus on the promise of philanthropy. You will leave Wye River with a sharpened philanthropic vision and a sense of collegiality among participants and the resource team.

Sessions:

OCTOBER 25-26, 2010
“Connecting Values to Philanthropic Mission”
Overnight retreat at Wye River Conference Center, Queenstown, MD

DECEMBER 2, 2010
“Effective Strategies: Application and Analysis”
Day-long session at The Aspen Institute, Washington, DC

MARCH 3, 2011
“Focus on Results: Achieving Impact”
Lecture, reception, and peer group discussion with seminar alumni, Washington, DC area; venue to be determined

APRIL 8, 2011
“Challenges and Action”
Presentation of and feedback on individual philanthropic strategies, The Aspen Institute, Washington, DC

MAY 17, 2011
“Learning to Action: From Theory to Practice to Impact”
Day-long Retreat, Washington, DC area; venue to be determined
**What will you take away?**

Through candid, informal dialogue with philanthropic leaders and peers, participants will discover ways to match good intentions with positive philanthropic outcomes. Through philanthropic case studies, your own goals and potential strategies will be clarified and enriched. Through focused dialogue, you and your peers will provide advice and counsel to one another in ways that will advance your philanthropic goals.

Participants will experience a unique speaker/participant ratio with leading philanthropic experts and leaders. By the workshop’s close in 2011, you will acquire:

- Best practices, carefully selected readings and case studies;
- Contacts in the philanthropic field;
- A more focused and informed philanthropic mission – to help you say ‘yes’ and ‘no’ more confidently;
- A straightforward framework and set of questions to apply to your giving – today and in the future;
- Guidance from peers that will make your philanthropy more effective and rewarding; and,
- Surprisingly deep, supportive relationships with fellow donors.

The specific ideas you take from the workshop experience will reflect your own goals and aspirations.

"Sharing an upcoming challenge and soliciting peer advice was the most interesting aspect of the seminar. It was very helpful to hear people’s issues…and then together help work through [them].”

“The overall impact of the workshop was to help me focus on what I want to accomplish with my giving. Learning about the criteria others used has helped us develop our own criteria and we can now be much more effective.”

“Most events I have attended were information-based. This was more introspective and one of the few that has made me do something different.”

**Registration and Fees**

Registration is limited to individual philanthropists and foundation trustees. Please register online no later than July 30, 2010, at https://secure.aspeninstitute.org/psi/Philanthropy-Strategy-Values-Workshop.

You will be contacted within two to three [2-3] business days with confirmation that space is available and with instructions to complete the registration and payment process.

**Contact:**

Tracey Totten, Meetings Manager
The Aspen Institute
(202) 736-1491
tracey.totten@aspeninstitute.org

**Workshop fees:**

- Full Participant $5,800, including lodging at Wye River.
- Aspen Institute Society of Fellows $4,800 (including lodging at Wye River)
- Spouse/Family Member $3,800 (including lodging at Wye River)