



PhilanthropyRoundtable

# The Fabric of Character

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*A Wise Giver's Guide to Supporting Social and Moral Renewal*

Anne Snyder



## **"For the Children's Sake"**

### The Oaks Academy Indianapolis, Indiana

*The question is not,—how much does the youth know? when he has finished his education—but how much does he care? And about how many orders of things does he care? In fact, how large is the room in which he finds his feet set? And, therefore, how full is the life he has before him?...*

*The child brings with him into the world not character but disposition. He has tendencies which may need only to be strengthened, or, again, to be diverted or even repressed. His character—the efflorescence of the man wherein the fruit of his life is a-preparing—is original disposition, modified, directed, expanded by education; by circumstances; later, by self-control and self-culture; above all, by the supreme agency of the Holy Ghost, even where that agency is little suspected, and as little solicited.*

~ **Charlotte Mason, British education reformer, 1923**

Margee Boswell was at her wits' end. Devon, a first grader, was acting out and blaming everyone but himself for his aggressive behavior. Not only were his teachers feeling increasingly helpless, but his patterns were wrecking the learning environment for the other students.

Boswell, the director of early-childhood education at The Oaks Academy, had one last thing to try. Coaxing the squirming boy into her office, she said, "Devon, I'm wondering if your conscience has gotten really, really small."

He stared at her, bewildered.

"My what?" Devon asked.

"Your conscience," Boswell said, as if it was his forearm, or his sweater, or some prized possession.

"What's that?" Devon asked.

She explained it to him. She said the conscience is like a muscle that signals the appropriate course of action. She said each one of us has one, regardless of whether we're aware of it, listen to it, or exercise it. Devon took it in, unusually quiet. He didn't like that a fundamental part of him was somehow undersized.

"Now, your conscience appears to have shrunken," Boswell said, "but I think there's a way we might be able to grow it back to normal size."

Devon's eyes grew big. "How do we do that?" he asked.

"Well," Boswell explained, "when you've done something, and you really know you did it, you just say to the person you offended, 'Yes, I did that. Will you forgive me?' And as you continue to do that, over and over, I think your conscience will start growing again." She paused, her eyes sparkling. "It might even get back to normal size."

Devon was sold. He returned to the classroom, and from that day on, began admitting to his teachers when he made a mistake and apologizing to his peers when he let his temper get the better of him.

Welcome to The Oaks Academy, a network of independent schools founded in 1998 that believes deeply in the power of learning to find and use one's moral muscles. Blending a classical educational approach with the philosophy of early-twentieth-century British educator Charlotte Mason, The Oaks has developed a learning model that is serving the most racially and socioeconomically diverse student body in urban Indianapolis. The students at its two elementary campuses and one middle school are 50 percent low-income, 25 percent middle-income, and 25 percent higher-income. They are 40 percent black, 40 percent white, and 20 percent biracial, Asian, or Hispanic.

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And these schools top the charts not only on test scores, but on community strength and cohesion, too. The Oaks grounds itself in four core values: (1) Study and celebrate truth, goodness, and beauty; (2) Recognize the personhood of each child; (3) Act as a catalyst for renewal; (4) Ensure that relationships come first in all interactions. Such are the conditions for what The Oaks does with distinction, that of forming the will and ordering desires, choice after choice, habit after habit.

### The child is a person

Charlotte Mason grounded her theory of education in four key pillars: (1) The Child Is a Person, (2) Education Is a Discipline, (3) Education Is a Science of Relations, and (4) Education Is a Life. They are interdependent to a great extent, yet to understand them concretely, and in contemporary context, I am going to take each as an individual axiom and see how together they inform the norms that govern The Oaks's educational approach.

"Our motto borrows from St. Augustine," says Boswell. "I am, I can, I ought, I will." In other words:

1. **I am**—We have the power of knowing ourselves.
2. **I can**—We are conscious of power to do what we perceive we ought to do.
3. **I ought**—We have within us a moral judge to whom we feel ourselves subject, who points out and requires of us our duty.
4. **I will**—We determine to exercise that power with a volition that is in itself a step in the execution of what we will.

The Oaks begins from the place of dignifying the child—both the child's potential, and his or her agency. There is no applying education *to* children, but rather helping them see themselves as learners. The Oaks believes that children are not blank slates or "embryonic oysters" who have the potential of becoming persons; they are *born* persons, capable of rising to high standards of behavior and honoring proper authority. "The concepts of authority and obedience are true for all people whether they accept them or not," wrote Mason in her book, *A Philosophy of Education*. "Submission to authority is necessary for any society or group or family to run smoothly. Authority is not a license to abuse children, or to play upon their emotions or other desires, and adults are not free to limit a child's education or use fear, love, power of suggestion, or their own influence over a child to make a child learn."

## **Education is a discipline**

If there's one thing The Oaks does with distinction, it's habit development. There is a lot of excitement these days around forming good habits—from Charles Duhigg, author of *The Power of Habit*, to popular panels at the South by Southwest festival, to a distracted and overwhelmed generation yearning for control and focus. But the deeper habits of will—of moral choosing, day in and day out—are often less discussed.

Beginning in third grade and continuing through eighth, Oaks students take time each semester to write about their habit development before reading the essay aloud in front of their classmates and parents.

"When the kids come to parent-teacher conferences, they're reflecting on their growth in these areas and leading that overall discussion," says Laura Grammer, The Oaks's award-winning middle-school principal. "It's not people putting this on them." There's also a level of vulnerability and understanding that "this is what we're doing together and here's where I am."



Children are not blank slates who have the potential of becoming persons; they are born persons, capable of rising to high standards of behavior and honoring proper authority.

Work begins in the youngest grades to model and support the following habits: Attention, Obedience, Respect, Responsibility, Reflection, Reverence, Punctuality, Thoroughness, Integrity, Self-Control, and Service. Instead of a curricular component confined to a certain day or week of the year, these habits are embedded in all interactions. Teachers know their students well and support them in weak areas by providing repeated opportunities for practice, self-correction, and success. Teachers also provide natural consequences when needed, and avoid manipulating students with "carrot and stick" incentives, which tend to result in resentment, or only temporary behavior change.

In Charlotte Mason's writing on education as a discipline, she noticed that parents and teachers would sometimes dismiss a child's lack of responsibility or maturity as an innate character flaw, instead of seeing it as a weakness that could be improved. At The Oaks, the whole

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philosophy is rooted in the conviction that each person has the capacity to develop these habits.

"Every person has attention," says Boswell. "You must choose to give it. It's not our job to grab your attention, and keep your attention. It's *your* job, and *your* duty, to give your attention to the matter at hand." The students are the actors in control of themselves.

As you might expect, with screens everywhere kids now enter The Oaks with less self-regulation than before. "We love technology as a tool," says Boswell, "but we don't think it has any place in the classroom." At the young ages, The Oaks encourages make-believe play, so that whatever roles student assume, they must abide by certain rules. (This is especially powerful for kids who don't come from neighborhoods where it is safe to play.) The goal is to become familiar with what it is to rise up to the proper standard, to grow into a particular virtue.

"Children have two guides to help them in their moral and intellectual growth"—"the way of the will" and "the way of reason," wrote Mason. "Children must learn the difference between 'I want' and 'I will.' They must learn to distract their thoughts when tempted to do what they may want but know is not right, and think of something else, or do something else, interesting enough to occupy their mind. After a short diversion, their mind will be refreshed and able to will with renewed strength."

### **Education is the science of relations**

An Oaks education is deeply humanistic, grounding both its pedagogical approach and disciplinary action in relationships. "The idea is that the more relationships you apprehend both with people and with knowledge," says Boswell, "the more serviceable you are."

By the time they get to eighth grade, Oaks students have to write three essays and reflect on them with their parents and a school administrator. The essays explore questions like: What has been my spiritual journey? What is truth? What is beauty? This helps them ponder: What *is* truth? Do I believe in truth? How do I identify truth? What *is* beauty? How can I be an agent to create beauty in the world? The hope is to marry the reflections on personal growth with all the art, beauty, music, and language that they've related to throughout their education.

"It's amazing to see our 13- and 14-year-olds wrestling with these deep ideas," says Grammer. The idea is that they develop a love for truth,

beauty, and goodness, and that their affections are shaped by what they are steeped in.

The Oaks's approach to discipline works similarly. When new teachers tour The Oaks for the first time, they see a disarming joy of relationship going on in the classrooms, where teachers are not motivating by way of threatening words or exciting promises.

“Don’t get me wrong,” says Grammer, “Our kids mess up. They do all the same things that other kids do. They hit each other. They bully. But they come and sit in front of you, and you say, ‘Okay, tell me what you did. What could you have done differently?’ And you have a dialogue with the child where he is taking ownership over his relationships. ‘How are you going to make this right? What relationship did you damage? Did you steal time from somebody? Did you steal a sense of safety? Did you steal honor and respect that was due to someone? Okay. How do you restore honor? How do you pay back time?’ They start to see their behavior in a relational context. Not in a ‘what are they getting out of it and how to make their life better’ context. They’re in rich relationships with *people*.”

The hope is that a moral sense develops that ultimately sees bad behavior as something that tears if not breaks relationships. Students are encouraged to think less about self, and more about shalom.

“Horrible things are going to happen to them in their life,” says Grammer. “They’re going to have a parent get sick and die, or get divorced. Or they’re going to be in an accident, or they’re going to unintentionally hurt somebody. How do you go on from that? Well, it’s the wealth of relationships that they create around them. And our students get a chance to reflect on this,” to learn what an authentic relationship requires and gives.

Teachers at The Oaks are trained to discern the particular reason for misbehavior. Is it ignorance: they didn’t understand the expectations? Is it weakness: they need support to do the right thing, as we all do at times? Or is it rebellion?

“The first thing you do is ask the child: ‘What did you hear me say? Can you tell me what you’re supposed to do?’ We’re asking them questions, never telling them what it is they did. If they really didn’t understand, then we just inform. Ignorance needs to be informed. You give them support. ‘Okay. We’re going to practice this until you get it. You know how to walk down the stairs, you know you’re not supposed to jump, we’re just going to practice that! Show me you can do it.’”

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But, Boswell continues, if “you’ve told them what to do, and broken it down into little steps so that anybody who wanted to do it could do it, and they won’t, then we have to look at it as rebellion.” This is where The Oaks’s relational cornerstone comes in.

“If they’ve rebelled,” says Boswell, “they’ve broken relationship. They’ve essentially taken themselves out from underneath good authority, so they’re removed. Isolation is the primary consequence for rebellion. And isolation can work because when you’re alone, your conscience finally has the ability to speak to you.”

“At some point they’ll tell you what they did,” Boswell continues, “they’ll confess it. And I’ll say to them, ‘How do you feel about that?’ And so often, they’ll just start weeping. They’ll say, ‘I feel bad.’ And I’ll say, ‘Oh, that’s good.’ And they’ll look at me like I’m crazy. ‘Why is this *good*?’”



By the time students graduate, they will have given 392 memorized recitations, some as short as a Bible verse, others as long as the Gettysburg addresss.

“This feeling tells you that you have a conscience,” she’ll respond. “When you do something bad, you’re supposed to feel bad. I’d feel bad if I did that too. But you don’t have to stay feeling bad. Let’s work through it. There’s a way to get the bad feelings out. And that is, you go back to the person, you tell them what you did, and you ask them to forgive you. Forgiveness is the only thing that cleanses that.”

From pre-K on, The Oaks is training children in this pattern of contrition and forgiveness and restoring relationships. “We say here that relationships come first,” says Boswell. “We will do whatever it takes to restore a relationship, because once that child’s relationship is restored, then they’re okay. They can go back in and they can learn. Otherwise, they’ve got all this emotional stuff going on, and they’re not listening anyway. They’re not willing to engage.”

In the midst of discipline, The Oaks is careful not to shame the child. “We teach our teachers, never tell a child that you’re disappointed in him or her. Disappointment expresses surprise and disgust and ‘how could you?’ Do we want our spouses or our friends to say, ‘I’m so disappointed

in you? When someone told you they were disappointed in you, you remember that. So we just peel back those words and teach our teachers to ask the student, ‘How are you feeling?’ They know. They know from a very early age. If you want to develop their conscience, treat them like they have a conscience. Make sure that they can look inward and say, ‘I knew that was wrong,’ rather than telling them it was wrong. If they have a conscience, you’ve got to let them feel it.”

### **Education is a life**

“I think one of the most tragic things that’s happening in American school systems today is how we manipulate children’s motivations by way of external praise and punishment,” says Grammer. “Do the right thing and you will always get rewarded” is not how real life works, so giving kids that illusion can be damaging. “If you’re constantly in a school system where people are motivating you by prods and carrots and sticks, that’s how you come to respond. But there are smart kids who figure out, ‘Hey, it’s worth it to just put up with consequences if I can actually take some control of my life.’ So you come to find out in classrooms, it’s always the same kids who are considered the bad kids. And always the same kids that are feeling really good about how they’re doing with no hard change. Because they know how to play the game.”

No Oaks classroom has a clip-up or clip-down status slide, marble goals, or candy rewards. “Why is getting an A on a test worth a piece of candy?” Grammer asks. “That knowledge you learned is so valuable. It just cheapens it” to equate it to a chunk of sugar.

Knowledge is rather like a treasure to discover and nurture. Oaks students memorize unusual quantities of poetry, sacred texts, and historic speeches. By the time they graduate they’ll have done 392 different recitations. Some of these are as brief as a Bible verse while others are as long as the Gettysburg Address.

“To cheapen [those recitations] to a sticker,” says Grammer, “when those words that they have graven on their hearts and minds, of great ideas...we are numbing a whole generation of kids by equating candy, pizza, stickers and certificates to knowledge.”

The Oaks is also of the mind that such feedback loops give kids a false sense of who they are in relationship to each other and the world—both the “good” kids and the “bad” kids. “The moment you get critiqued, you crumble. As soon as you realize you did something wrong, you ask, ‘What’s wrong with me and my value?’”

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When you visit elite college campuses today, it's striking how outwardly driven students are, how sensitive to external feedback. Millennials are simultaneously stressed and coddled. Often their sense of self seems driven by acclaim of others, which can lead to poor decision-making, unnecessary anxiety, and a hyper-sensitivity to uncomfortable content.

The Oaks offers preventative medicine, training young people to make decisions based on internalized standards of the good. When an award is given to an Oaks student, it's a private thanks granted by the teacher. Commendation of a job well done, yes, but there's no fanfare, no ego oxygen that might grant a false sense of identity that will only slow them down later in life.

"We want to teach them to be a good friend, or a spouse, or a dependable employee, or a doctor driven by good ethics, when you don't always get noticed for doing the right thing," says Grammer. "We want children who are motivated internally to continue to choose to do the right thing even when there is no tangible or immediate reward for that."

Training the teachers *away from* behavioral-management techniques is almost as tough as trying to counteract the logic perpetuated in many households.

"Teachers and parents [deal in conditional love] without even realizing the deeper implications, because it works on the surface level," says Grammer. "Children *want* to get rewarded. We crave to be recognized and appreciated; it feeds right into our pride and our fear and our guilt."

The problem is, parents and teachers "don't see how they are creating praise junkies by over-praising rather than encouraging. There are all these studies now about 'our kids need grit,' 'they need perseverance.' And yet this is what you are doing? They don't see that what you are doing is taking those traits away from them, because the fact is their will is something that has to be exercised. Just like you have to practice over and over again to get good at shooting a basketball, or reading, or math facts. If you are not given the opportunity to choose to do the right thing yourself, you cannot strengthen your own will."

The Oaks spends serious time training its incoming teachers to unlearn many of their starting assumptions. "Our professional development for them starts from the moment they sit down with us at the interview table," says Boswell. There's a week of new faculty orientation, mentors and observations in classrooms, and workshops with parents throughout the year.

"A lot of it is about changing the language for those" with moral authority, says Grammer. "Because so much of this is about people

wanting a program that they can buy and put in their school. So teachers and school administrators can say, ‘This is our character development program. This is how we intrinsically motivate our kids.’ But the fact is, character is never something you can put on the kids; it’s how you live life with them.” This living alongside “is shaped entirely by what the teachers believe about children and people. If they don’t believe our fundamental conviction that children are persons, then [character development] can’t work in a classroom.”



When an award is given to a student, it is a private thanks, rather than a fanfare. The goal is children who choose to do the right thing even when there is no immediate reward.

### A generative seedbed—*E Pluribus Unum*

When it comes to character crucibles, there are few more pronounced than those awkward tween years from sixth to eighth grade. Hormones are flowing. The kids are more socially aware and insecure. When I met with Grammer in her principal’s office, she had just ushered out a couple of crying 13-year-olds. “Middle schoolers act like little adults, and then they act like pre-K students. One minute they’re throwing a temper fit and the next minute you’re thinking, ‘Wow, that was amazing. I’m learning from you.’”

The key is to continue to treat them like people, Grammer says. “Too many adults get so emotionally enmeshed with kids, rather than allowing them to struggle through whatever they’re dealing with. Don’t take it personally. We try to rescue them too often from the struggle, from these hard emotions.”

Oaks kids are used to being around people from different backgrounds, but by the time middle school arrives, they start to wrestle with the implications of social difference. “We don’t say we’re colorblind around here,” says Grammer. “But middle school is when they’re really starting to develop their identity separate from their parents. They’re trying to figure out where they stand in the world and with peers.”

Some kids come from a rough street culture, for instance. When you get offended, you’re expected to take revenge and fight back. When

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someone comes to us with this issue, we've learned never to say, "Don't fight back." That's just not okay to communicate to a young man who has grown up in a culture where honor and even survival demands that you fight for everything. Instead we say, "Listen, you stand up for what's right. Here are some words you can use: You tell them that it is never okay, and you say it strongly. Your impulse to fight back is good.... But how do you harness that in the best way?"

It's always a dialogue at The Oaks, to find the virtuous response while taking cultural contexts into account. "We believe every person at the core has the same needs and desires: to be seen and known for who they are, and loved in spite of everything."

The schools teach classical tales from around the world, showcasing non-Western musical traditions, presenting historical points of view and philosophies from both victors and the downtrodden. Everyone is taught how to dance, by eighth grade having learned at least eight historical dances from around the world.

In middle school, the students are assigned to a house, where identities form not around economic status or race but around universal virtues—*Veritas* (truth), *Animus* (bravery), *Fidelitas* (faithfulness), *Dignitas* (dignity). Students talk often about what their house name means and why it's important. The houses do regular service projects, and off-campus activities like camping trips provide built-in leadership opportunities for eighth-graders to mentor sixth-graders. Students gain a sense that they're part of something bigger than themselves, something foundational to all the other aspects of their identity.

"Teaching character requires returning to some basic principles of human flourishing, human relating, and lifelong learning," Oaks CEO Andrew Hart says. It's interesting: Given the school's diverse demographics and today's conventional wisdom, you'd expect more conversations to deal with issues of trauma and structural injustice. And those conversations happen, but The Oaks is proof that a cultural climate motivating kids to take hold of their own agency takes care of many of the other issues.

Mentoring and leadership opportunities abound, and a broader sense of school-as-family pervades the halls. The atmosphere is welcoming, from cozy armchairs in the hallway to classical music in a first-grade painting class. There's always one time a year that each grade level comes to the middle school—whether it's algebra students leading an activity

on exponential growth with the first-graders, or the fourth-graders coming over and the seventh-graders taking them into the science lab for frog dissection. The eighth-graders go to the lower-school campuses to do service in the classrooms, with younger eyes watching.

Grammer credits former head of school and now CEO Andrew Hart with modeling the importance of relationality from the moment kids step out of the car. Every morning he and the other school leaders stand on the curb to greet every family and child by name as they arrive. Then everyone gathers for a song in the open hallway, parents often sticking around to center themselves before the work day begins.

“We have a parent community that’s just so diverse, socioeconomically and racially, and so committed to our model.... The Oaks has become community for our parents,” says Hart. Parents mix who would have never had the opportunity to cross paths. A kid from a wealthy neighborhood goes to a birthday party in an inner-city neighborhood. Suspicions ease and awkwardness melts as the shared backdrop of The Oaks takes center stage. “There’s nothing like experience,” says Boswell. “There’s nothing like relationships.”

## **Results, resources, and replication**

The Oaks is changing the lives of teachers, families, and of course kids, but equally notable is the mark it’s made on the larger city of Indianapolis. It serves as a point of light, of diversity as strength, of a cultivation of the model citizen and beloved neighbor. “Teachers come to The Oaks and say that their careers have been saved,” says Boswell, who’s hired and mentored dozens of Oaks teachers over the school’s 20 years. Student alumni return often on their days off, wanting to say hello and relive fond memories.

There are 400 of these alumni so far, and high schools show keen interest in recruiting them. Some of the schools that cost as much as \$20,000 a year will find financial aid for Oaks graduates because of their distinctive self-command, ability to relate to others, and engagement with ideas at a superior level. Most Oaks grads make honor rolls at their respective high schools, regardless of background. And teachers at these high schools say that the students who come to them from The Oaks are consistently “mature,” “leaders,” and “comfortable in their own skin.”

In the beginning The Oaks’s revenue consisted of an even split of tuition and philanthropy. That was the model for a dozen years. Then in 2010, the state of Indiana launched a program that allowed individuals or businesses to be eligible for up to a 50 percent tax credit if they donated

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money to a nonprofit that helps low- or moderate-income families pay for children using private schools. The Oaks chose to stay out of the voucher program in its first year, to be sure there were no encumbering strings attached. But once it became clear that there would be minimal interference from the state with curriculum, hiring, or other key elements of school operation, The Oaks opted in.

Today, The Oaks still covers about 35 percent of its budget through private donations raised from 500–600 donors per year. In 2017–18, that was \$3.4 million. The Oaks received funding from the Walton Family Foundation, the Drexel Fund, and some other national entities to scale up its campuses. Increasingly, though, it relies on local philanthropists, plus the donated funds that are channeled through the state program.

At present, about 19 percent of Oaks families pay full tuition. Everyone else is on some form of scholarship, but almost all pay something to make sure students and families have skin in the game.

This model of affordable, high-quality, boundary-crossing education built on a moral core has sparked interest in other parts of the country. The Field School, which opened its doors on the south side of Chicago in 2018, was inspired by The Oaks blend of character training, classical education, and Charlotte Mason philosophy. A group of parents in Charlotte, North Carolina, are organizing to establish an offshoot in their city. A hedge-fund executive in San Francisco has offered to provide funding to start Oaks Academies in all the voucher states around the country.

Andrew Hart and his colleagues are studying their options. Should they expand further in their home city and state? Spend energy and resources to jump to new regions? Help allies plant similar schools elsewhere on their own?

“It’s been our dream all along to proliferate this model,” says Hart. Trying to package their success into transferable formulas, however, would be tricky. The secrets to the success of the academies—intimate relationships, very selective hiring, family involvement, and so forth—are resistant to shortcuts.

“Right now, we just don’t know,” admits Hart. “We’re exploring writing an open-source cookbook describing what it takes to start the kind of culture we have, and sustain the model.” Maybe, he wonders aloud, “we should just have people come and visit and be inspired. Do we embrace and feed more ed tourism? Or do we actively pursue educational entrepreneurs who want to incubate our model?” Everything from curriculum, teacher development, by-laws, and policy handbooks,

to guidance on governance, mission statements, and fundraising strategies would have to be spelled out. Already, The Oaks is sharing some of its discoveries through something called the Indiana School Leader Fellowship, a network that connects principals across the state.

A kind of city-on-a-hill model, inspiring proliferations that are appropriate to their local contexts, currently seems most practical. The essential starting point for any replication in another city, Hart notes, is having outstanding leaders. “You have to find the right creator, as well as founding families, and trustees that are in it for the long haul.”

Meanwhile, The Oaks is still refining its own practices. “We hope to expand the implementation of character and virtue development, as well as devise a meaningful system of evaluation, especially since we view character as an integrated part of the educational philosophy instead of a stand-alone curricular element. The Oaks has been asked by other schools and organizations across the country to share information about the implementation and benefits of habit formation.”

For now, that generous leadership seems to be The Oaks’s greatest contribution to a world eager for its magic. As a Proverb says: “Above all else, guard your heart, for everything you do flows from it.”

# ABOUT THE PHILANTHROPY ROUNDTABLE

The Philanthropy Roundtable is America's leading network of charitable donors working to strengthen our free society, uphold donor intent, and protect the freedom to give. Our members include individual philanthropists, families, corporations, and private foundations.

## Mission

The Philanthropy Roundtable's mission is to foster excellence in philanthropy, to protect philanthropic freedom, to assist donors in achieving their philanthropic intent, and to help donors advance liberty, opportunity, and personal responsibility in America and abroad.

## Principles

- Philanthropic freedom is essential to a free society
- A vibrant private sector generates the wealth that makes philanthropy possible
- Voluntary private action offers solutions to many of society's most pressing challenges
- Excellence in philanthropy is measured by results, not by good intentions
- A respect for donor intent is essential to long-term philanthropic success

## Services

### *World-class conferences*

The Philanthropy Roundtable connects you with other savvy donors. Held across the nation throughout the year, our meetings assemble grant-makers and experts to develop strategies for excellent local, state, and national giving. You will hear from innovators in K-12 education, economic opportunity, higher education, national security, and other fields. Our Annual Meeting is the Roundtable's flagship event, gathering the nation's most public-spirited and influential philanthropists for debates,

how-to sessions, and discussions on the best ways for private individuals to achieve powerful results through their giving. The Annual Meeting is a stimulating and enjoyable way to meet principled donors seeking the breakthroughs that can solve our nation's greatest challenges.

#### *Breakthrough groups*

Our Breakthrough groups—focused program areas—build a critical mass of donors around a topic where dramatic results are within reach. Breakthrough groups become a springboard to help donors achieve lasting effects from their philanthropy. Our specialized staff of experts helps grantmakers invest with care in areas like anti-poverty work, philanthropy for veterans, and family reinforcement. The Roundtable's K-12 education program is our largest and longest-running Breakthrough group. This network helps donors zero in on today's most promising school reforms. We are the industry-leading convener for philanthropists seeking systemic improvements through competition and parental choice, administrative freedom and accountability, student-centered technology, enhanced teaching and school leadership, and high standards and expectations for students of all backgrounds. We foster productive collaboration among donors of varied ideological perspectives who are united by a devotion to educational excellence.

#### *A powerful voice*

The Roundtable's public-policy project, the Alliance for Charitable Reform (ACR), works to advance the principles and preserve the rights of private giving. ACR educates legislators and policymakers about the central role of charitable giving in American life and the crucial importance of protecting philanthropic freedom—the ability of individuals and private organizations to determine how and where to direct their charitable assets. Active in Washington, D.C., and in the states, ACR protects charitable giving, defends the diversity of charitable causes, and battles intrusive government regulation. We believe the capacity of private initiative to address national problems must not be burdened with costly or crippling constraints.

#### *Protection of donor interests*

The Philanthropy Roundtable is the leading force in American philanthropy to protect donor intent. Generous givers want assurance that their money will be used for the specific charitable aims and purposes they

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believe in, not redirected to some other agenda. Unfortunately, donor intent is usually violated in increments, as foundation staff and trustees neglect or misconstrue the founder's values and drift into other purposes. Through education, practical guidance, legislative action, and individual consultation. The Philanthropy Roundtable is active in guarding donor intent. We are happy to advise you on steps you can take to ensure that your mission and goals are protected.

### *Must-read publications*

*Philanthropy*, the Roundtable's quarterly magazine, is packed with useful and beautifully written real-life stories. It offers practical examples, inspiration, detailed information, history, and clear guidance on the differences between giving that is great and giving that disappoints.

We also publish a series of guidebooks that provide detailed information on the very best ways to be effective in particular aspects of philanthropy. These guidebooks are compact, brisk, and readable. Most focus on one particular area of giving—for instance, how to improve teaching, charter-school expansion, support for veterans, programs that get the poor into jobs, how to invest in public policy, and other topics of interest to grantmakers. Real-life examples, hard numbers, first-hand experiences of other donors, recent history, and policy guidance are presented to inform and inspire thoughtful donors.

The Roundtable's *Almanac of American Philanthropy* is the definitive reference book on private giving in our country. It profiles America's greatest givers (historic and current), describes the 1,000 most consequential philanthropic achievements since our founding, and compiles comprehensive statistics on the field. Our *Almanac* summarizes the major books, key articles, and most potent ideas animating U.S. philanthropy. It includes a 23-page timeline, national poll, legal analysis, and other crucial—and fascinating—finger-tip facts on this vital piece of American culture.

### **Join the Roundtable!**

When working with The Philanthropy Roundtable, members are better equipped to achieve long-lasting success with their charitable giving. Your membership in the Roundtable will make you part of a potent network that understands philanthropy and strengthens our free society. Philanthropy Roundtable members range from Forbes 400 individual givers and the largest American foundations to small family

foundations and donors just beginning their charitable careers. Our members include:

- Individuals and families
- Private foundations
- Community foundations
- Venture philanthropists
- Corporate giving programs
- Large operating foundations and charities that devote more than half of their budget to external grants

Philanthropists who contribute at least \$100,000 annually to charitable causes are eligible to become members of the Roundtable and register for most of our programs. Roundtable events provide you with a solicitation-free environment.

For more information on The Philanthropy Roundtable or to learn about our individual program areas, please call (202) 822-8333 or e-mail [main@PhilanthropyRoundtable.org](mailto:main@PhilanthropyRoundtable.org).

## ABOUT THE AUTHOR

Anne Snyder directs The Philanthropy Roundtable’s Character Initiative, a program that seeks to help foundations and business leaders strengthen the “middle ring” of morally formative institutions in the United States. She is also a fellow at the Center for Opportunity Urbanism, a Houston-based think tank that explores how cities can drive opportunity for the bulk of their citizens, and a senior fellow at The Trinity Forum. From 2014 to 2017 Anne worked for Laity Lodge and the H. E. Butt Family Foundation in Texas, and before that, the Ethics and Public Policy Center, *World Affairs Journal*, and the *New York Times*. She has published in *Atlantic Monthly*, the *Washington Post*, *City Journal*, and elsewhere, and is a contributing editor to *Comment Magazine* and a trustee at the Center for Public Justice. Anne spent the formative years of her childhood overseas before earning a bachelor’s degree from Wheaton College (IL) and a master’s degree from Georgetown University. She currently lives in Washington, D.C.

## The Fabric of Character

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