Title: Spend Down - *Tending the Tender Fire*

**Description:** Whether as an individual, family or institution, spending down is a brave, many-layered thing. This circle invites Solidaire members at any stage of consideration to inquire deeply into the *why*, *when*, and *how* of spending down. The circle will promote no singular or prescriptive methodology for spending down, instead we will cultivate collective (confidential) inquiry - tending to the questions emerging for those who join. For example …

- How much is “enough” to set aside for one’s own family?
- How do we involve and be accountable to the groups we support when spending down?
- What are possibilities for zero’ing out assets (that might be accruing)?
- How do we manage multi-generational perspectives within one family or institution?
- How do our spend-downs contribute to larger movements for reparation, liberation, and dismantling capitalism?

Because there may be a diverse set of needs and questions, we are holding two hour sessions to allow for full group time, as well as sub-group caucuses for tailored considerations of identity, organizational type, asset size, pacing, context, etc.

**Timeline:** *January to June 2023*

The circle will meet every 3rd Wednesday of the month starting January 18th, from 10 am - 12 noon PT / 1:00 to 3:00 pm EST. The exact dates are:

- January 18th - 10:00 - 12:00 noon PT / 1:00 to 3:00 pm ET
- February 15th - 10:00 - 12:00 noon PT / 1:00 to 3:00 pm ET
- March 15th - 10:00 - 12:00 noon PT / 1:00 to 3:00 pm ET
- April 19th - 10:00 - 12:00 noon PT / 1:00 to 3:00 pm ET
- May 17th - 10:00 - 12:00 noon PT / 1:00 to 3:00 pm ET
- June 21st - 10:00 - 12:00 noon PT / 1:00 to 3:00 pm ET

*Participants are expected to sign up for the full slate of sessions (though it's okay if you have to miss 1 session), as we’re using a cohort model and want to build consistency with each other. There is no cost for joining this circle for Solidaire members.*

**Goals of the Circle**

1. Build a brave, honest, supportive member cohort on the spend down road that can be a place of aspiration, support and problem solving for the journey.
2. Create courageous space for participants to clarify the why, when, and how of their spend-outs.
3. Workshop the mechanics of spending down by talking with those who’ve been through it, and through peer to peer resourcing
4. Conspire together on how we can advocate and agitate for spend-downs throughout philanthropy.

Session Descriptions:
The content of the sessions will be shaped by the questions and considerations of those who join, so the following will likely shift and iterate. What won’t shift is the design and facilitation towards building community and collective inquiry.

Session 1: Bringing Ourselves & Our Emerging Questions in Community
Land together and begin creating the conditions for deep relationship and deep inquiry into spending down. What called us here? What do we hope to receive? What do we offer?

Session 2: Why Spend Down?
Explore the terrain of motivations and reasons to spend down - from personal to institutional to societal. How do we match our values with our intentions for spending out?

Session 3: How Might Spend Down Play Out?
Based on the specific considerations that participants bring to the circle, this and the next session will be designed to address them. This may look like whole or small group peer support, scenario planning, guest speakers, introduction to tools and resources, fishbowls, practicing conversations that scare us.

Session 4: How Might Spend Down Play Out? Part 2
Based on the specific considerations that participants bring to the circle, this and the prior session will be designed to address them. This may look like whole or small group peer support, scenario planning, guest speakers, introduction to tools and resources, fishbowls, practicing conversations that scare us.

Session 5: Advocacy & Spend Down
One aspect of spend down is an opportunity to outwardly model and promote the practice of questioning perpetuity within a social and economic context that often rewards hoarding. How are participants seeing their journey as a public one? What are opportunities and considerations for advocacy that align with the aims
of the movements for liberation and reparation in the sector?

Session 6: **Honoring Exactly Where We Are, and Where Oh The Places We'll Go**
Together we will create closing rituals that might include personal sharing about insights (and more questions) that may have come to you as part of this circle. We will also consider if and what the future of this cohort may look like.

**Facilitator Bios w/ Pictures:**

Pia Infante is currently the Senior Fellow at the Trust Based Philanthropy Project. She led The Whitman Institute, a private foundation, through a 10 year spend down which ended in June 2022. Pia believes we have the collective imagination and power to redesign philanthropy to center the people we serve. Philippine-born, California-grown, and queer, oldest daughter in an immigrant family, Pia brings her chops as a former high school teacher, organizational development consultant, and nonprofit manager to her work. Pia is a nationally recognized advocate for trust-based philanthropy and radically embodied leadership. She holds a M.A. in Education from the New School for Social Research, and a B.A. in Rhetoric from The University of California at Berkeley. Follow her @PiaVision.