



The Next Chapter: Increased Impact & Sustained Success

A foundation for the next twenty years,
a strategy for the next three 2026-2029

ADOPTED
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INTRODUCTION

In 2025, Liberty Fellowship celebrated its 20th Anniversary as South Carolina's premier leadership program and one of the longest-standing members of the Aspen Global Leadership Network.

Over that 20-year history Liberty Fellowship has undergone a series of changes, most notably to establish itself as an independent 501(c)3 in 2023 and transition to a fully Fellow governed Board of Directors. Throughout, Liberty Fellowship has sustained its core mission, cultivated a network of over 350 diverse, high-impact, values-based leaders who have achieved a long list of remarkable accomplishments and fulfilled two-decades of remarkable service to our state and country.

In this plan, we look ahead twenty years to envision Liberty Fellowship in 2045 as...

- A dynamic, connected network of over 600 Fellows who are actively working together across sectors and geographies to realize critical opportunities and address pressing challenges facing South Carolina.
- A highly sustainable, professional organization that is seen as a local and national thought-leader in advancing civil discourse and facilitating positive change in the state.
- An active convener of critical public conversations.
- A trusted partner with leading institutions in the state as well as other regional and national organizations that are invested in advancing South Carolina.
- A catalyst to advance South Carolina on a national and global stage.
- A model for other states on how to drive place-based success through values-based leadership programs.

To achieve this vision, Liberty Fellowship developed two bodies of strategic work that share a common aim – to clarify and codify foundational operating principles, and to mobilize and focus the Liberty Fellowship network on the most critical issues over the next three years.

Liberty Fellowship rigorously reviewed and restated the core Vision, Mission, and Values of the organization to establish a clear foundation to build upon. Next, we defined three Strategic Priorities and seven Key Objectives that will guide Liberty Fellowship's focused efforts over the next three years.

This strategic plan is the result of direct conversations with over 100 Fellows, hours of reflection, research, discussion, and planning with the Liberty Fellowship Board, Strategic Planning Committee, Class Connectors and those who attended Liberty Fellowship's Annual Meeting 2026. This marks the start to the inspiring work. The future success of Liberty Fellowship will be strengthened and sustained in partnership with those who share our vision and values.

LIBERTY FELLOWSHIP STRATEGIC PLANNING COMMITTEE

Committee Chair

Jason Tompkins (2018)

Board Chair

Kerri Forrest (2018)

Committee Members

Ted Swann (2020)

Rochelle Williams (2023)

Sherard Duval (2020)

Susie Shannon (2013)

Chakisse Newton (2015)

Mindelle Ziff (2013)

Rob Howell (2018)

OVERVIEW

Our Foundations

What will continue to be true about Liberty Fellowship?

The core values and Liberty Fellowship experience will hold true. We will commit to:

- ▶ Boldly maintaining our position as an independent, non-partisan, non-sectarian, nonprofit organization.
- ▶ Expanding our network of Fellows and convene a premier leadership cohort bi-annually to cultivate a mosaic of values-based leaders across South Carolina.
- ▶ Leveraging Socratic inquiry to advance civil discourse.
- ▶ Strengthening our strategic partnership with The Aspen Institute to amplify our impact.
- ▶ Elevating and supporting Fellows as they work to advance South Carolina in collaboration with leaders and communities across the state.

Our Future

What's evolving in our understanding of the work?

Liberty Fellowship's understanding of the collective work has evolved to meet the demands of a new era. Going forward, Liberty Fellowship will commit to:

- ▶ **Advancing South Carolina on a national and global stage**
While the work of Liberty Fellowship begins in South Carolina, it often extends beyond the state, where Fellows advance critical business and community opportunities, and serve in executive leadership roles in public, for-profit, and not-for-profit entities. We believe that all South Carolinians can benefit when our state is elevated around the country and around the world. No organization is better positioned than Liberty Fellowship to advance this charge.
- ▶ **Active institutional leadership**
For many years, Liberty Fellowship operated on the principle that "Liberty Fellowship does not act; its Fellows do." We continue to affirm that Fellows, their vision and work, are the primary way Liberty Fellowship will advance our shared vision for South Carolina. We also want to clarify that to achieve our vision, there are important moments when Liberty Fellowship must act in its capacity as a non-partisan, non-sectarian, independent values-based institution. While there is more work to do to define and mature in this role, a few areas of action are clear. Liberty Fellowship will act:
 - To convene, connect, and advance collaborative opportunities among Fellows.
 - To facilitate private and public conversations to advance civil discourse around critical issues affecting South Carolinians.

 Hosting public forums

The good work of Liberty Fellowship is never accomplished alone. Early in its history, Liberty Fellowship hosted a range of public events to advance critical issues and to engage leaders and communities beyond Liberty Fellowship. Looking ahead, Liberty Fellowship is committed to establish an Annual Public Forum, alongside other new initiatives which will amplify the work of our Fellows and deepen civil discourse across South Carolina.

 Developing active partnerships and innovative programs

To advance the work of Liberty Fellowship and civil discourse in South Carolina and beyond, Liberty Fellowship will actively explore how to develop and launch new initiatives with mission-aligned partners including The Aspen Institute.

THE PLANNING PROCESS

In February 2025, a Strategic Planning Committee was formed by the Board of Directors. The Strategic Planning Committee defined its initial set of goals and developed an RFP to hire a planning firm to begin strategic planning work following the 20th Anniversary Celebration in April 2025. Openfields, a social innovation agency based in Greenville, South Carolina, who works across the country with non-profit organizations and foundations, was selected to facilitate the process. Over the next six months, the planning process included:

- ▶ Engagement at the 20th Anniversary Celebration (April 25-27, 2025)
- ▶ Full organizational documentation review
- ▶ Market research to explore similar programs around the country
- ▶ Monthly planning committee meetings and workshops
- ▶ 1:1 interviews with a wide range of Fellows across classes
- ▶ Interviews with the directors of three additional Aspen Institute Fellowships – Henry Crown Fellowship, Pahara Institute, and the Civil Society Fellowship
- ▶ Interviews with Aspen Global Leadership Network (AGLN) Leadership
- ▶ Quarterly presentations and discussions with the Board of Directors
- ▶ A three-day planning retreat in Charleston
- ▶ Presentations with Class Connectors
- ▶ Numerous conversations with Fellows to test emerging insights and ideas

In this process, the task of the Strategic Planning Committee was to make recommendations to the Board of Directors on how to accomplish the following:

- ▶ Clarify Liberty Fellowship's vision, mission, and values
- ▶ Improve the current Fellowship Seminar program
- ▶ Expand engagement opportunities for alumni
- ▶ Identify and develop new mission-aligned initiatives to expand impact and diversify revenue
- ▶ Align the organizational structure and resources to ensure the sustainable delivery of strategic priorities

Along the way, several strategic efforts were undertaken to augment the planning process:

- ▶ John Simpkins (Class of 2009), former VP at the Aspen Global Leadership Network, was retained to evaluate the current program and curriculum and to make recommendations on how to improve and evolve the program in line with the wider AGLN learning. *Note: These recommendations have been applied to the Class of 2027 program.*
- ▶ David Cutler (Class of 2018), was asked to lead an Impact & Innovation Committee, comprised of Fellows, to explore creative strategies for increasing Liberty Fellowship's engagement and generating more sustainable, diverse sources of revenue. *Note: The Impact & Innovation Committee will issue a set of recommendations to the Fellowship at the March 2027 Annual Gathering.*

The core of the Committee's planning process was completed in December 2025 and has since been tested and socialized with a range of Fellows through:

- ▶ Group presentation and a workshop at the Annual Gathering (March 2026)
- ▶ Formal and informal presentations and discussions with individual Fellows, Class Connectors, and Board members

CRITICAL FACTORS FOR EXECUTION

Throughout the learning process, three critical factors emerged for how Liberty Fellowship can successfully advance the Fellowship and the broader institution in the next chapter. It was clear that the how of the strategy was as important as the what. The following factors and questions serve as a guide for ongoing reflection, alignment, and implementation of the strategy:

Provide Clear Leadership & A Credible Voice

- Is the vision clear? Do we know where we are headed? Can Liberty Fellowship articulate a clear and compelling case for the Fellowship and how it addresses the critical issues of our day?

Cultivate Trust

- Is the governance of Liberty Fellowship sufficiently transparent? Do we understand how decisions are made?
- Is the quality of Liberty Fellowship's programming consistent? Does the experience deliver on its promise? Does Liberty Fellowship do what it says it will do?
- Does Liberty Fellowship take an appropriate stand – privately and publicly – in line with its stated values?

Sustain Consistent Connection

- Does Liberty Fellowship sustain consistency of visible leadership and relationships?
- Is there a consistency of Fellow programming beyond the Fellowship?
- Are Fellows consistently engaged through a model which values varied contributions and involvement alongside financial support?

The Committee and Board present the following Foundations and Future Plan for advancing Liberty Fellowship for the next chapter.

THE NEXT CHAPTER FOR INCREASED IMPACT & SUSTAINED SUCCESS

1. THE FOUNDATIONS OF LIBERTY FELLOWSHIP

In 2026, with this Strategy, Liberty Fellowship is reestablishing a clear set of commitments and principles to honor the first twenty years of work and to strengthen the foundation for the next twenty years.

About Liberty Fellowship

Who we are

Liberty Fellowship is an independent, values-based leadership organization committed to advancing the state of South Carolina on a local, national, and global stage. We are a non-partisan, non-sectarian 501(c)3 organization and a member of Aspen Institute's Global Leadership Network.

Vision

The future we imagine

We envision an active network of values-based leaders working together to boldly advance South Carolina's economy, environment, and culture and elevate the health and well-being of all South Carolinians and their communities, today and for future generations.

Mission

Our role in advancing the vision

Our mission is to cultivate and activate a network of values-based leaders who are committed to working across differences to realize South Carolina's greatest opportunities and meet its greatest challenges.

Values

What guides the culture, character, and decisions of our organization and Fellowship

Enduring hope	From our state motto Dum spiro spero, "While I breathe, I hope."
Courageous leadership	Taking personal and professional risks to advance the common good.
Discourse across differences	Pursuing open, honest, and respectful dialogue across differences – personal, political, and generational – to expand perspectives, cultivate relationships, and generate more creative, lasting solutions.
Timeless wisdom	Drawing from historic works of literature, letters, arts, and culture to expand and deepen our understanding of the shared human experience and our modern moment.

A member of the Aspen Global Leadership Network

While independent, Liberty Fellowship maintains an active membership and working partnership with The Aspen Global Leadership Network (AGLN) in order to advance South Carolina. In its own words, AGLN *is a growing, worldwide community of high-integrity leaders who share a commitment to use their creativity, energy, and resources to tackle the foremost societal challenges of our times. Through a rare community of support, transformative convenings, and catalytic capital, we ignite 4,200 Fellows across 62 countries to turn moral courage into lasting change.*

2. LIBERTY FELLOWSHIP FUTURE

Strategic Priorities | 2026-2029

To advance this impactful objective in service of our vision, mission, and values, Liberty Fellowship will focus its efforts on advancing three strategies over the next three years.

1. Collective Confidence and Commitment

Reestablish with clarity, consistency, and transparency, Liberty Fellowship's purpose and vision. Elevate the quality and consistency of all programs. Invite all Fellows to reconnect and recommit to their work for South Carolina through the Fellowship. Build a strong organizational culture and infrastructure to sustain operations and communications throughout the network.

2. Mission-Driven Public Engagement

Reintroduce public forums. Curate, commission, and publish thought-leadership content. Cultivate active partnerships in South Carolina and beyond.

3. Inspiring Innovation

Explore, pilot, and launch new programs and platforms to deepen, expand, and help fund the work of Liberty Fellowship through increased engagement with Fellows, partners, and cross-sector leaders.

Strategic Objectives & Actions | 2026-2029

To advance the three strategic priorities, we have outlined seven critical objectives and the initial set of actions needed to achieve them. As of July 2026, we're proud to share that we have collectively made substantial progress toward achieving a number of these objectives.

1. Refine and elevate the Liberty Fellowship experience

- a. Conducted a thorough evaluation of the past three Fellowship classes (September 2025 – February 2026)
- b. Adopt improvements across the Fellowship experience – class selection, readings, moderators, mentors, and ventures (March – May 2026)

2026 Status: Key modifications have been made to improve the overall experience and align with AGLN's programming evolution including: expanding the age of eligible Fellows to 35-55, reducing the number of seminars from 5 to 4, and utilizing only Aspen trained moderators residing & working outside of South Carolina to protect the integrity of the experience and increase comfort for Fellows.

2. Graduate the next class of Liberty Fellows in 2027

- a. Launched the next class of Fellows (June 2026)
- b. Built the organizational and financial capacity to graduate a new class of 21 Fellows every two year

2026 Status: The Liberty Fellowship Class of 2027 kicked off in June 2026.

3. Network cultivation: Establish a consistent set of programs and communications for Fellows within South Carolina and AGLN

- a. Host an Annual Gathering (Spring 2026-2029)
- b. Engage and equip Class Connectors to be effective ambassadors for Liberty Fellowship (2026-2029)
- c. Host statewide Fellow Salons – 3/year – and other private seminars
- d. Explore more formal engagements locally and nationally with AGLN (2026-2029) and other Aspen Fellowships

2026 Status: The 20th Anniversary Celebration and the 2026 Annual Meeting were both notable successes. The 2027 Annual Meeting is scheduled for March 4, 2027.

4. Public engagement: Reintroduce public forums for advancing civil discourse to help realize South Carolina's greatest opportunities and meet its greatest challenges

- a. Hire a full-time public engagement officer to support the Fellowship and lead new public programs (2027)
- b. Host an Annual Public Forum (Fall 2026-2029)
- c. Publish a regular public resource to advance civil discourse (short-form content or long-form research)
- d. Explore additional, sustainable public seminars (2027-2029)

2026 Status: The 20th Anniversary Celebration and the 2026 Annual Meeting were both notable successes. The 2027 Annual Meeting is scheduled for March 4, 2027

5. Network innovation

- a. Identify and develop a series of new impact offerings (2026-2027)
- b. Fund and pilot at least one new offering (2027-2028)
- c. Launch a sustainable new initiative (2028-2029)

2026 Status: The Impact & Innovation Committee has developed an initial range of possible offerings that are currently being evaluated and developed to share with the Board of Directors and the wider Fellowship later in 2026 and at the 2027 Annual Meeting. The Board has adopted a Planning Scorecard to guide program expansion.

6. Strengthen national and state-based partnerships in service to public leadership

- a. Strengthen and expand our partnership with the Aspen Global Leadership Network
- b. Explore partnerships with mission-aligned academic centers and community partners

2026 Status: Liberty Fellowship partnered with The Aspen Institute in March 2026 to host a Senior Executive Seminar for 19 influential leaders in SC. Liberty Fellowship is committed to partnering with Leadership SC and The Riley Institute at Furman University to host a leadership cohort for new C-Suite level executives relocating to SC.

7. Organizational capacity and sustainability

- a. Raise \$1M in contributions annually
- b. Initiate a Liberty Fellowship endowment for long-term sustainability
- c. Convene an Ad hoc Governance Committee to review and/or revise Liberty Fellowship by-laws in line with the emerging vision and strategy

2026 Status: The Board of Directors has convened a new Development Committee as well as a new Governance Committee, both of which will begin meeting later in 2026.