

Return of Organization Exempt From Income Tax

OMB No. 1545-0047

Form 990

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)
Do not enter social security numbers on this form as it may be made public.
Go to www.irs.gov/Form990 for instructions and the latest information.

2023

Open to Public Inspection

A For the 2023 calendar year, or tax year beginning and ending
B Check if applicable:
C Name of organization THE ASPEN INSTITUTE, INC.
D Employer identification number 84-0399006
E Telephone number (202) 736-5800
G Gross receipts \$ 633,009,589.
H(a) Is this a group return for subordinates?
H(b) Are all subordinates included?
I Tax-exempt status:
J Website: WWW.ASPENINSTITUTE.ORG
K Form of organization:
L Year of formation: 1949
M State of legal domicile: CO

Part I Summary
Table with columns: Activities & Governance, Revenue, Expenses, Net Assets or Fund Balances. Rows include mission statement, governance metrics, revenue breakdown, expenses, and net assets.

Part II Signature Block

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete.

Signature of officer: ANDREW AXELROD, EVP FIN. & ENTERPRISE BUS. DEV.
Preparer: AARON M. FOX, MARCUM LLP
Firm's address: 1899 L STREET, NW, SUITE 850 WASHINGTON, DC 20036

May the IRS discuss this return with the preparer shown above? See instructions [X] Yes [ ] No

Part III Statement of Program Service Accomplishments

Check if Schedule O contains a response or note to any line in this Part III [X]

1 Briefly describe the organization's mission: WE DRIVE CHANGE THROUGH DIALOGUE, LEADERSHIP, AND ACTION TO HELP SOLVE SOCIETY'S GREATEST CHALLENGES.

2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? [ ] Yes [X] No

3 Did the organization cease conducting, or make significant changes in how it conducts, any program services? [ ] Yes [X] No

4 Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses.

4a (Code: ) (Expenses \$ 117,271,305. including grants of \$ 32,916,686. ) (Revenue \$ 20,967,524. ) POLICY PROGRAMS: THE ASPEN INSTITUTE'S POLICY PROGRAMS EXPLORE AND IDENTIFY SOLUTIONS FOR PROBLEMS RANGING FROM ECONOMIC DISTRESS TO EDUCATIONAL OPPORTUNITY, FROM CLIMATE CHANGE TO RACIAL DISPARITIES, IN AN EFFORT TO INFLUENCE DECISION-MAKERS IN THE PUBLIC AND PRIVATE SECTORS TO ADVANCE THE BEST AND MOST INSPIRED PROPOSALS. OUR POLICY PROGRAMS RANGE IN SIZE FROM \$100,000 TO \$15 MILLION IN ANNUAL REVENUE AND EXPENSES.

4b (Code: ) (Expenses \$ 19,499,709. including grants of \$ ) (Revenue \$ 34,839. ) CAMPUS ACTIVITIES: IN ADDITION TO ITS HEADQUARTERS IN WASHINGTON, DC, THE ASPEN INSTITUTE ALSO CONDUCTS MUCH OF ITS WORK ON ITS FOUNDING CAMPUS IN ASPEN, COLORADO, WHICH PROVIDES NATURAL BEAUTY AND QUIET SURROUNDINGS THAT ENCOURAGE THOUGHTFUL REFLECTION AND REFRESHES MIND, BODY AND SPIRIT. ONE OF OUR PROGRAMS THAT USE THE CAMPUS IS OUR ASPEN EXECUTIVE SEMINAR WHICH CHALLENGES INDIVIDUALS TO THINK MORE DEEPLY, LISTEN MORE ATTENTIVELY, AND REFINE THEIR ABILITY TO LEAD IN AN INCREASINGLY COMPLEX AND CONFLICTING WORLD. SEMINAR PARTICIPANTS ENGAGE IN CHALLENGING CONVERSATIONS ABOUT ENDURING QUESTIONS OF ETHICAL AND EFFECTIVE LEADERSHIP, GAINING A GREATER CAPACITY TO LEAD WITH COURAGE AND CONVICTION.

4c (Code: ) (Expenses \$ 16,712,757. including grants of \$ ) (Revenue \$ 16,583,566. ) PUBLIC PROGRAMS: THE INSTITUTE'S PUBLIC PROGRAMS ARE DESIGNED TO FREELY DISSEMINATE THE ORGANIZATION'S IDEAS AND TO PROVIDE THE PUBLIC WITH OPPORTUNITIES TO CONVENE INCLUSIVELY AND ENGAGE IN THOUGHTFUL, NONPARTISAN DIALOGUE. OUR MAJOR EVENTS INCLUDE THE ASPEN IDEAS FESTIVAL, ASPEN IDEAS HEALTH, THE ASPEN SECURITY FORUM, CITY LAB AND ASPEN WORDS. THESE AND OUR OTHER PUBLIC FORUMS ENGAGE OVER 15,000 MEMBERS OF THE GENERAL PUBLIC ANNUALLY.

4d Other program services (Describe on Schedule O.) (Expenses \$ 27,217,962. including grants of \$ 1,553,181. ) (Revenue \$ 3,529,661. )

4e Total program service expenses 180,701,733.

Part IV Checklist of Required Schedules

Table with 3 columns: Question ID, Yes, No. Rows include questions 1 through 21 regarding organizational requirements and reporting.

Part IV Checklist of Required Schedules (continued)

Table with 3 columns: Question ID, Question Text, Yes, No. Rows include questions 22 through 38 regarding organization reporting, compensation, tax-exempt bonds, and business transactions.

Part V Statements Regarding Other IRS Filings and Tax Compliance

Check if Schedule O contains a response or note to any line in this Part V

Table with 3 columns: Question ID, Question Text, Yes, No. Rows include questions 1a, 1b, and 1c regarding Form 1096, Forms W-2G, and backup withholding rules.

Part V Statements Regarding Other IRS Filings and Tax Compliance (continued)

Table with columns for question number, question text, and Yes/No response boxes. Includes questions 2a through 17 regarding employee counts, tax returns, gross income, foreign accounts, prohibited transactions, and charitable contributions.

Part VI Governance, Management, and Disclosure. For each "Yes" response to lines 2 through 7b below, and for a "No" response to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes on Schedule O. See instructions.

Check if Schedule O contains a response or note to any line in this Part VI [X]

Section A. Governing Body and Management

Table with 3 columns: Question, Yes, No. Rows include: 1a Enter the number of voting members of the governing body at the end of the tax year (64); 1b Enter the number of voting members included on line 1a, above, who are independent (63); 2 Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee? (X); 3 Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors, trustees, or key employees to a management company or other person? (X); 4 Did the organization make any significant changes to its governing documents since the prior Form 990 was filed? (X); 5 Did the organization become aware during the year of a significant diversion of the organization's assets? (X); 6 Did the organization have members or stockholders? (X); 7a Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body? (X); 7b Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body? (X); 8 Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following: a The governing body? (X); b Each committee with authority to act on behalf of the governing body? (X); 9 Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses on Schedule O (X).

Section B. Policies (This Section B requests information about policies not required by the Internal Revenue Code.)

Table with 3 columns: Question, Yes, No. Rows include: 10a Did the organization have local chapters, branches, or affiliates? (X); 10b If "Yes," did the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes?; 11a Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form? (X); 11b Describe on Schedule O the process, if any, used by the organization to review this Form 990.; 12a Did the organization have a written conflict of interest policy? If "No," go to line 13 (X); 12b Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts? (X); 12c Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe on Schedule O how this was done (X); 13 Did the organization have a written whistleblower policy? (X); 14 Did the organization have a written document retention and destruction policy? (X); 15 Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision? a The organization's CEO, Executive Director, or top management official (X); b Other officers or key employees of the organization (X); If "Yes" to line 15a or 15b, describe the process on Schedule O. See instructions.; 16a Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year? (X); 16b If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's exempt status with respect to such arrangements?

Section C. Disclosure

- 17 List the states with which a copy of this Form 990 is required to be filed AL, AK, AZ, AR, CA, CO, CT, FL, GA, IL, KS, KY
18 Section 6104 requires an organization to make its Forms 1023 (1024 or 1024-A, if applicable), 990, and 990-T (section 501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply. [X] Own website [ ] Another's website [X] Upon request [ ] Other (explain on Schedule O)
19 Describe on Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year.
20 State the name, address, and telephone number of the person who possesses the organization's books and records
ASPEN INSTITUTE/JENNIFER JONES - (202) 736-5800
2300 N STREET, NW, 700, WASHINGTON, DC 20037

**Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors**

Check if Schedule O contains a response or note to any line in this Part VII

**Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees**

**1a** Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.
  - List all of the organization's **current** key employees, if any. See the instructions for definition of "key employee."
  - List the organization's five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (box 5 of Form W-2, box 6 of Form 1099-MISC, and/or box 1 of Form 1099-NEC) of more than \$100,000 from the organization and any related organizations.
  - List all of the organization's **former** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.
  - List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.
- See the instructions for the order in which to list the persons above.

Check this box if neither the organization nor any related organization compensated any current officer, director, or trustee.

(A) Name and title	(B) Average hours per week (list any hours for related organizations below line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC/1099-NEC)	(E) Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(1) DANIEL PORTERFIELD PRESIDENT & CEO	40.00	X		X			789,901.	0.	53,542.	
(2) ELLIOT GERSON EXECUTIVE VP	40.00			X			576,899.	0.	57,030.	
(3) DAVID LANGSTAFF EXECUTIVE VP	40.00			X			449,743.	0.	55,981.	
(4) CYNTHIA MCKEE EVP INSTITUTIONAL ADVANCEMENT	40.00					X	450,314.	0.	38,085.	
(5) ANDREW AXELROD EVP FINANCE & ENTERPRISE BUS DEV.	40.00			X			452,148.	0.	12,450.	
(6) STEPHEN PATRICK EXECUTIVE VP	40.00					X	370,953.	0.	59,855.	
(7) ANNE MOSLE VP, EXECUTIVE DIRECTOR	40.00					X	366,704.	0.	59,864.	
(8) JAMES SPIEGELMAN SENIOR ADVISOR	40.00					X	354,344.	0.	59,848.	
(9) MIECHA FORBES VP, PEOPLE AND CULTURE	40.00					X	370,386.	0.	33,766.	
(10) MARIA ACEBAL VP STRATEGIC DEV CORP SECRETARY	40.00			X			340,907.	0.	39,213.	
(11) MARGOT L. PRITZKER CHAIR	1.00	X		X			0.	0.	0.	
(12) KATHARINE ALBRIGHT TRUSTEE	1.00	X					0.	0.	0.	
(13) JEFFREY S. ARONIN TRUSTEE	1.00	X					0.	0.	0.	
(14) ALEX M. AZAR II TRUSTEE	1.00	X					0.	0.	0.	
(15) DONNA BARKSDALE TRUSTEE	1.00	X					0.	0.	0.	
(16) MERCEDES BASS TRUSTEE	1.00	X					0.	0.	0.	
(17) MIGUEL (MIKE) BEZOS TRUSTEE	1.00	X					0.	0.	0.	

**Part VII** Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees (continued)

(A) Name and title	(B) Average hours per week (list any hours for related organizations below line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC/1099-NEC)	(E) Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(18) LAWRENCE BOBO TRUSTEE	1.00	X						0.	0.	0.
(19) BETH BROOKE TRUSTEE	1.00	X						0.	0.	0.
(20) WILLIAM BYNUM TRUSTEE	1.00	X						0.	0.	0.
(21) TROY CARTER TRUSTEE	1.00	X						0.	0.	0.
(22) CESAR R. CONDE TRUSTEE	1.00	X						0.	0.	0.
(23) PHYLLIS COULTER TRUSTEE	1.00	X						0.	0.	0.
(24) KATIE COURIC TRUSTEE	1.00	X						0.	0.	0.
(25) ANDREA CUNNINGHAM TRUSTEE	1.00	X						0.	0.	0.
(26) JAMES S. CROWN TRUSTEE	1.00	X						0.	0.	0.
<b>1b Subtotal</b>								4,522,299.	0.	469,634.
<b>c Total from continuation sheets to Part VII, Section A</b>								0.	0.	0.
<b>d Total (add lines 1b and 1c)</b>								4,522,299.	0.	469,634.

**2** Total number of individuals (including but not limited to those listed above) who received more than \$100,000 of reportable compensation from the organization 246

	Yes	No
<b>3</b> Did the organization list any <b>former</b> officer, director, trustee, key employee, or highest compensated employee on line 1a? <i>If "Yes," complete Schedule J for such individual</i>		X
<b>4</b> For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? <i>If "Yes," complete Schedule J for such individual</i>	X	
<b>5</b> Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? <i>If "Yes," complete Schedule J for such person</i>		X

**Section B. Independent Contractors**

**1** Complete this table for your five highest compensated independent contractors that received more than \$100,000 of compensation from the organization. Report compensation for the calendar year ending with or within the organization's tax year.

(A) Name and business address	(B) Description of services	(C) Compensation
MOLINE CONSTRUCTION 1312 W EXCHANGE PARKWAY, ALLEN, TX 75013	CONSTRUCTION SERVICES	4,406,267.
SYPARTNERS LLC, 395 HUDSON STREET, 8TH FLOOR, NEW YORK, NY 10014	STRATEGIC PLANNING CONSULTING SERVICES	1,490,487.
DAVID NELSON CONSTRUCTION CO 3483-19 ALT, PALM HARBOR, FL 34683	CONSTRUCTION SERVICES	1,203,091.
ITHAKA HARBORS, ONE LIBERTY PLAZA 165 BROADWAY, NEW YORK, NY 10006	ASPEN LEADERSHIP PROGRAM EVALUATION	1,184,374.
MOUNTAIN VIEW STAGING SERVICES 545 WEST 1300 NORTH, SPRINGVILLE, UT 84663	AUDIO VISUAL SERVICES	1,071,527.
<b>2</b> Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 of compensation from the organization	63	

SEE PART VII, SECTION A CONTINUATION SHEETS



**Part VII** Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees (continued)

(A) Name and title	(B) Average hours per week (list any hours for related organizations below line)	(C) Position (check all that apply)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(27) KENNETH L. DAVIS, MD TRUSTEE	1.00	X						0.	0.	0.
(28) JOHN DOERR TRUSTEE	1.00	X						0.	0.	0.
(29) THELMA DUGGIN TRUSTEE	1.00	X						0.	0.	0.
(30) ARNE DUNCAN TRUSTEE	1.00	X						0.	0.	0.
(31) MICHAEL D. EISNER TRUSTEE	1.00	X						0.	0.	0.
(32) L. BROOKS ENTWISTLE TRUSTEE	1.00	X						0.	0.	0.
(33) ELIZABETH FLEMING TRUSTEE	1.00	X						0.	0.	0.
(34) ROGER FERGUSON TRUSTEE	1.00	X						0.	0.	0.
(35) HENRY LOUIS GATES, JR. TRUSTEE	1.00	X						0.	0.	0.
(36) RUSSELL GOLDSMITH TRUSTEE	1.00	X						0.	0.	0.
(37) ANTONIO GRACIAS TRUSTEE	1.00	X						0.	0.	0.
(38) PATRICK W. GROSS TRUSTEE	1.00	X						0.	0.	0.
(39) ARJUN GUPTA TRUSTEE	1.00	X						0.	0.	0.
(40) JANE HARMAN TRUSTEE	1.00	X						0.	0.	0.
(41) KAYA HENDERSON TRUSTEE	1.00	X						0.	0.	0.
(42) MARK HOPLAMAZIAN TRUSTEE	1.00	X						0.	0.	0.
(43) GERALD D. HOSIER TRUSTEE	1.00	X						0.	0.	0.
(44) ROBERT HURST TRUSTEE	1.00	X						0.	0.	0.
(45) SONIA KAPADIA TRUSTEE	1.00	X						0.	0.	0.
(46) MICHAEL KLEIN TRUSTEE	1.00	X						0.	0.	0.
Total to Part VII, Section A, line 1c .....										

**Part VII** Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees (continued)

(A) Name and title	(B) Average hours per week (list any hours for related organizations below line)	(C) Position (check all that apply)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(47) KELI LEE TRUSTEE	1.00	X					0.	0.	0.	
(48) LAURA LAUDER TRUSTEE	1.00	X					0.	0.	0.	
(49) MELONY LEWIS TRUSTEE	1.00	X					0.	0.	0.	
(50) JAMES M. MANYIKA TRUSTEE	1.00	X					0.	0.	0.	
(51) CRAIG MARTIN TRUSTEE	1.00	X					0.	0.	0.	
(52) BONNIE PALMER MCCLOSKEY TRUSTEE	1.00	X					0.	0.	0.	
(53) ANNE WELSH MCNULTY TRUSTEE	1.00	X					0.	0.	0.	
(54) DIANE L. MORRIS TRUSTEE	1.00	X					0.	0.	0.	
(55) KARLHEINZ MUHR TRUSTEE	1.00	X					0.	0.	0.	
(56) CLARE MUNANA TRUSTEE	1.00	X					0.	0.	0.	
(57) JERRY MURDOCK TRUSTEE	1.00	X					0.	0.	0.	
(58) HER MAJESTY QUEEN NOOR TRUSTEE	1.00	X					0.	0.	0.	
(59) OLARA A. OTUNNU TRUSTEE	1.00	X					0.	0.	0.	
(60) ELAINE PAGELS TRUSTEE	1.00	X					0.	0.	0.	
(61) ASUTOSH PADHI TRUSTEE	1.00	X					0.	0.	0.	
(62) PERRI PELTZ TRUSTEE	1.00	X					0.	0.	0.	
(63) CARRIE WALTON PENNER TRUSTEE	1.00	X					0.	0.	0.	
(64) CARLA PINEYRO-SUBLETT TRUSTEE	1.00	X					0.	0.	0.	
(65) WILLIAM RESNICK TRUSTEE	1.00	X					0.	0.	0.	
(66) RICARDO SALINAS TRUSTEE	1.00	X					0.	0.	0.	
Total to Part VII, Section A, line 1c .....										

Part VII Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees (continued)

Table with 7 columns: (A) Name and title, (B) Average hours per week, (C) Position (Individual trustee or director, Institutional trustee, Officer, Key employee, Highest compensated employee, Former), (D) Reportable compensation from the organization, (E) Reportable compensation from related organizations, (F) Estimated amount of other compensation. Rows include Anna Deavere Smith, Robert K. Steel, Laurie M. Tisch, Christopher Varelas, Roderick K. Von Lipsey, Vin Weber, and Jessie Woolley-Wilson.

Total to Part VII, Section A, line 1c

**Part VIII Statement of Revenue**

Check if Schedule O contains a response or note to any line in this Part VIII

			(A)	(B)	(C)	(D)	
			Total revenue	Related or exempt function revenue	Unrelated business revenue	Revenue excluded from tax under sections 512 - 514	
Contributions, Gifts, Grants and Other Similar Amounts	<b>1 a</b> Federated campaigns .....	<b>1a</b>					
	<b>b</b> Membership dues .....	<b>1b</b>					
	<b>c</b> Fundraising events .....	<b>1c</b>	1,843,068.				
	<b>d</b> Related organizations .....	<b>1d</b>					
	<b>e</b> Government grants (contributions) .....	<b>1e</b>	9,378,895.				
	<b>f</b> All other contributions, gifts, grants, and similar amounts not included above ...	<b>1f</b>	166,508,543.				
	<b>g</b> Noncash contributions included in lines 1a-1f	<b>1g</b>	\$ 9,436,141.				
	<b>h Total.</b> Add lines 1a-1f .....		177,730,506.				
Program Service Revenue	<b>2 a</b> CONTRACT REVENUE	Business Code					
		900099	30,713,004.	30,713,004.			
	<b>b</b> SEMINAR AND EVENT FEES	900099	10,396,710.	10,396,710.			
	<b>c</b> CONF./FACILITY FEES	531390	9,308,990.		9,308,990.		
	<b>d</b> BOOK SALES	900099	5,876.	5,876.			
	<b>e</b> .....						
	<b>f</b> All other program service revenue .....						
<b>g Total.</b> Add lines 2a-2f .....		50,424,580.					
Other Revenue	<b>3</b> Investment income (including dividends, interest, and other similar amounts) .....		3,770,754.		157,479.	3,613,275.	
	<b>4</b> Income from investment of tax-exempt bond proceeds .....						
	<b>5</b> Royalties .....						
	<b>6 a</b> Gross rents .....	<b>6a</b>	(i) Real				
				41,973.			
			(ii) Personal				
	<b>b</b> Less: rental expenses ...	<b>6b</b>	169,208.				
	<b>c</b> Rental income or (loss)	<b>6c</b>	-127,235.				
	<b>d</b> Net rental income or (loss) .....		-127,235.			-127,235.	
	<b>7 a</b> Gross amount from sales of assets other than inventory .....	<b>7a</b>	(i) Securities				
				399,276,945.			
			(ii) Other				
	<b>b</b> Less: cost or other basis and sales expenses .....	<b>7b</b>	399,359,416.				
	<b>c</b> Gain or (loss) .....	<b>7c</b>	-82,471.				
<b>d</b> Net gain or (loss) .....		-82,471.			-82,471.		
<b>8 a</b> Gross income from fundraising events (not including \$ 1,843,068. of contributions reported on line 1c). See Part IV, line 18 .....	<b>8a</b>		166,163.				
		<b>b</b> Less: direct expenses .....	<b>8b</b>	1,371,630.			
		<b>c</b> Net income or (loss) from fundraising events .....		-1,205,467.			-1,205,467.
<b>9 a</b> Gross income from gaming activities. See Part IV, line 19 .....	<b>9a</b>						
		<b>b</b> Less: direct expenses .....	<b>9b</b>				
		<b>c</b> Net income or (loss) from gaming activities .....					
<b>10 a</b> Gross sales of inventory, less returns and allowances .....	<b>10a</b>						
		<b>b</b> Less: cost of goods sold .....	<b>10b</b>				
		<b>c</b> Net income or (loss) from sales of inventory .....					
Miscellaneous Revenue	<b>11 a</b> OTHER INCOME	Business Code					
		900099	843,116.			843,116.	
	<b>b</b> SUBLEASE INCOME	900099	739,504.			739,504.	
	<b>c</b> ADVERTISING INCOME	541800	16,048.		16,048.		
	<b>d</b> All other revenue .....						
<b>e Total.</b> Add lines 11a-11d .....		1,598,668.					
<b>12 Total revenue.</b> See instructions .....		232,109,335.	41,115,590.	9,482,517.	3,780,722.		

**Part IX Statement of Functional Expenses**

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A).

Check if Schedule O contains a response or note to any line in this Part IX  X

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
<b>1</b> Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21 ...	25,165,910.	25,165,910.		
<b>2</b> Grants and other assistance to domestic individuals. See Part IV, line 22 .....	1,114,825.	1,114,825.		
<b>3</b> Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16 .....	8,189,132.	8,189,132.		
<b>4</b> Benefits paid to or for members .....				
<b>5</b> Compensation of current officers, directors, trustees, and key employees .....	2,827,815.	101,405.	2,726,410.	
<b>6</b> Compensation not included above to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B) .....				
<b>7</b> Other salaries and wages .....	67,783,472.	50,502,655.	14,306,802.	2,974,015.
<b>8</b> Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)	6,235,742.	5,560,531.	315,333.	359,878.
<b>9</b> Other employee benefits .....	6,151,369.	5,427,529.	446,504.	277,336.
<b>10</b> Payroll taxes .....	4,775,020.	4,141,896.	365,478.	267,646.
<b>11</b> Fees for services (nonemployees):				
<b>a</b> Management .....	16,002,723.	16,002,723.		
<b>b</b> Legal .....	895,307.	179,249.	716,058.	
<b>c</b> Accounting .....	167,517.		167,517.	
<b>d</b> Lobbying .....				
<b>e</b> Professional fundraising services. See Part IV, line 17				
<b>f</b> Investment management fees .....	1,025,844.		1,025,844.	
<b>g</b> Other. (If line 11g amount exceeds 10% of line 25, column (A), amount, list line 11g expenses on Sch O.)	36,295,465.	26,839,245.	9,370,021.	86,199.
<b>12</b> Advertising and promotion .....				
<b>13</b> Office expenses .....	4,866,231.	2,556,407.	2,309,824.	
<b>14</b> Information technology .....	1,935,876.	1,727,230.	208,447.	199.
<b>15</b> Royalties .....				
<b>16</b> Occupancy .....	5,796,984.	3,691,827.	2,105,157.	
<b>17</b> Travel .....	18,683,380.	17,625,908.	926,643.	130,829.
<b>18</b> Payments of travel or entertainment expenses for any federal, state, or local public officials ...	533,656.	533,656.		
<b>19</b> Conferences, conventions, and meetings .....	6,933,502.	6,541,889.	343,227.	48,386.
<b>20</b> Interest .....	293,380.	153,768.	139,612.	
<b>21</b> Payments to affiliates .....				
<b>22</b> Depreciation, depletion, and amortization .....	4,175,940.		4,175,940.	
<b>23</b> Insurance .....	483,462.	57,322.	426,140.	
<b>24</b> Other expenses. Itemize expenses not covered above. (List miscellaneous expenses on line 24e. If line 24e amount exceeds 10% of line 25, column (A), amount, list line 24e expenses on Schedule O.)				
<b>a</b> PARTNER REIMBURSEMENTS	2,258,771.	2,258,771.		
<b>b</b> PUBLICATIONS	2,080,537.	1,993,203.	86,963.	371.
<b>c</b> REPAIRS AND MAINTENANCE	723,856.	223,781.	500,075.	
<b>d</b> BAD DEBT	342,959.	112,871.		230,088.
<b>e</b> All other expenses				
<b>25</b> Total functional expenses. Add lines 1 through 24e	225,738,675.	180,701,733.	40,661,995.	4,374,947.
<b>26</b> Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here <input type="checkbox"/> if following SOP 98-2 (ASC 958-720)				

**Part X Balance Sheet**

Check if Schedule O contains a response or note to any line in this Part X

		(A) Beginning of year		(B) End of year
<b>Assets</b>	<b>1</b> Cash - non-interest-bearing .....	10,189,779.	<b>1</b>	11,119,375.
	<b>2</b> Savings and temporary cash investments .....	23,540,105.	<b>2</b>	40,570,734.
	<b>3</b> Pledges and grants receivable, net .....	39,355,994.	<b>3</b>	73,328,617.
	<b>4</b> Accounts receivable, net .....	8,632,723.	<b>4</b>	4,483,957.
	<b>5</b> Loans and other receivables from any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons .....		<b>5</b>	
	<b>6</b> Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), and persons described in section 4958(c)(3)(B) .....		<b>6</b>	
	<b>7</b> Notes and loans receivable, net .....		<b>7</b>	
	<b>8</b> Inventories for sale or use .....	278,414.	<b>8</b>	332,405.
	<b>9</b> Prepaid expenses and deferred charges .....	2,543,500.	<b>9</b>	4,059,323.
	<b>10a</b> Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D .....	<b>10a</b> 126,963,998.		
	<b>b</b> Less: accumulated depreciation .....	<b>10b</b> 49,199,341.		
	<b>11</b> Investments - publicly traded securities .....	74,468,353.	<b>10c</b>	77,764,657.
	<b>12</b> Investments - other securities. See Part IV, line 11 .....	78,563,638.	<b>11</b>	81,148,136.
	<b>13</b> Investments - program-related. See Part IV, line 11 .....	169,017,803.	<b>12</b>	174,410,016.
	<b>14</b> Intangible assets .....		<b>13</b>	
	<b>15</b> Other assets. See Part IV, line 11 .....	69,292,562.	<b>14</b>	
<b>16</b> <b>Total assets.</b> Add lines 1 through 15 (must equal line 33) .....	475,882,871.	<b>15</b>	519,114,037.	
<b>17</b> Accounts payable and accrued expenses .....	15,343,072.	<b>16</b>	519,114,037.	
<b>18</b> Grants payable .....	15,343,072.	<b>17</b>	18,384,226.	
<b>19</b> Deferred revenue .....	2,140,947.	<b>18</b>	2,653,325.	
<b>20</b> Tax-exempt bond liabilities .....	15,882,204.	<b>19</b>	17,813,064.	
<b>21</b> Escrow or custodial account liability. Complete Part IV of Schedule D .....		<b>20</b>		
<b>22</b> Loans and other payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons .....		<b>21</b>		
<b>23</b> Secured mortgages and notes payable to unrelated third parties .....	3,780,000.	<b>22</b>		
<b>24</b> Unsecured notes and loans payable to unrelated third parties .....		<b>23</b>	7,700,840.	
<b>25</b> Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D .....	66,610,309.	<b>24</b>		
<b>26</b> <b>Total liabilities.</b> Add lines 17 through 25 .....	103,756,532.	<b>25</b>	64,336,411.	
<b>27</b> Net assets without donor restrictions .....	124,326,717.	<b>26</b>	110,887,866.	
<b>28</b> Net assets with donor restrictions .....	247,799,622.	<b>27</b>	123,295,839.	
<b>29</b> Capital stock or trust principal, or current funds .....		<b>28</b>	284,930,332.	
<b>30</b> Paid-in or capital surplus, or land, building, or equipment fund .....		<b>29</b>		
<b>31</b> Retained earnings, endowment, accumulated income, or other funds .....		<b>30</b>		
<b>32</b> Total net assets or fund balances .....	372,126,339.	<b>31</b>		
<b>33</b> Total liabilities and net assets/fund balances .....	475,882,871.	<b>32</b>	408,226,171.	
<b>33</b> Total liabilities and net assets/fund balances .....	475,882,871.	<b>33</b>	519,114,037.	

Form 990 (2023)

**Part XI Reconciliation of Net Assets**

Check if Schedule O contains a response or note to any line in this Part XI

<b>1</b>	Total revenue (must equal Part VIII, column (A), line 12)	<b>1</b>	232,109,335.
<b>2</b>	Total expenses (must equal Part IX, column (A), line 25)	<b>2</b>	225,738,675.
<b>3</b>	Revenue less expenses. Subtract line 2 from line 1	<b>3</b>	6,370,660.
<b>4</b>	Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))	<b>4</b>	372,126,339.
<b>5</b>	Net unrealized gains (losses) on investments	<b>5</b>	29,416,939.
<b>6</b>	Donated services and use of facilities	<b>6</b>	
<b>7</b>	Investment expenses	<b>7</b>	
<b>8</b>	Prior period adjustments	<b>8</b>	
<b>9</b>	Other changes in net assets or fund balances (explain on Schedule O)	<b>9</b>	312,233.
<b>10</b>	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 32, column (B))	<b>10</b>	408,226,171.

**Part XII Financial Statements and Reporting**

Check if Schedule O contains a response or note to any line in this Part XII

- 1** Accounting method used to prepare the Form 990:  Cash  Accrual  Other \_\_\_\_\_  
If the organization changed its method of accounting from a prior year or checked "Other," explain on Schedule O.
- 2a** Were the organization's financial statements compiled or reviewed by an independent accountant? \_\_\_\_\_  
If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both:  
 Separate basis  Consolidated basis  Both consolidated and separate basis
- b** Were the organization's financial statements audited by an independent accountant? \_\_\_\_\_  
If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both:  
 Separate basis  Consolidated basis  Both consolidated and separate basis
- c** If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant? \_\_\_\_\_  
If the organization changed either its oversight process or selection process during the tax year, explain on Schedule O.
- 3a** As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Uniform Guidance, 2 C.F.R. Part 200, Subpart F? \_\_\_\_\_
- b** If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why on Schedule O and describe any steps taken to undergo such audits \_\_\_\_\_

	Yes	No
<b>2a</b>		X
<b>2b</b>	X	
<b>2c</b>	X	
<b>3a</b>	X	
<b>3b</b>	X	

Form **990** (2023)

**SCHEDULE A**  
**(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Public Charity Status and Public Support**

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.  
Attach to Form 990 or Form 990-EZ.  
Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

OMB No. 1545-0047

**2023**

**Open to Public Inspection**

<b>Name of the organization</b> THE ASPEN INSTITUTE, INC.	<b>Employer identification number</b> 84-0399006
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**Part I Reason for Public Charity Status.** (All organizations must complete this part.) See instructions.

The organization is not a private foundation because it is: (For lines 1 through 12, check only one box.)

- 1  A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i).**
- 2  A school described in **section 170(b)(1)(A)(ii).** (Attach Schedule E (Form 990).)
- 3  A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii).**
- 4  A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii).** Enter the hospital's name, city, and state: \_\_\_\_\_
- 5  An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv).** (Complete Part II.)
- 6  A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v).**
- 7  An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi).** (Complete Part II.)
- 8  A community trust described in **section 170(b)(1)(A)(vi).** (Complete Part II.)
- 9  An agricultural research organization described in **section 170(b)(1)(A)(ix)** operated in conjunction with a land-grant college or university or a non-land-grant college of agriculture (see instructions). Enter the name, city, and state of the college or university: \_\_\_\_\_
- 10  An organization that normally receives (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions, subject to certain exceptions; and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2).** (Complete Part III.)
- 11  An organization organized and operated exclusively to test for public safety. See **section 509(a)(4).**
- 12  An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in **section 509(a)(1)** or **section 509(a)(2).** See **section 509(a)(3).** Check the box on lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g.
  - a  **Type I.** A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization. **You must complete Part IV, Sections A and B.**
  - b  **Type II.** A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s). **You must complete Part IV, Sections A and C.**
  - c  **Type III functionally integrated.** A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions). **You must complete Part IV, Sections A, D, and E.**
  - d  **Type III non-functionally integrated.** A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions). **You must complete Part IV, Sections A and D, and Part V.**
  - e  Check this box if the organization received a written determination from the IRS that it is a Type I, Type II, Type III functionally integrated, or Type III non-functionally integrated supporting organization.
  - f Enter the number of supported organizations .....
- g Provide the following information about the supported organization(s).

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1-10 above (see instructions))	(iv) Is the organization listed in your governing document?		(v) Amount of monetary support (see instructions)	(vi) Amount of other support (see instructions)
			Yes	No		
<b>Total</b>						



**Part II Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)**

(Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

**Section A. Public Support**

Calendar year (or fiscal year beginning in)	(a) 2019	(b) 2020	(c) 2021	(d) 2022	(e) 2023	(f) Total
<b>1</b> Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.") .....	108,438,960.	131,254,703.	140,723,732.	141,560,565.	177,730,506.	699,708,466.
<b>2</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf .....						
<b>3</b> The value of services or facilities furnished by a governmental unit to the organization without charge .....						
<b>4 Total.</b> Add lines 1 through 3 .....	108,438,960.	131,254,703.	140,723,732.	141,560,565.	177,730,506.	699,708,466.
<b>5</b> The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f) .....						65,965,384.
<b>6 Public support.</b> Subtract line 5 from line 4.						633,743,082.

**Section B. Total Support**

Calendar year (or fiscal year beginning in)	(a) 2019	(b) 2020	(c) 2021	(d) 2022	(e) 2023	(f) Total
<b>7</b> Amounts from line 4 .....	108,438,960.	131,254,703.	140,723,732.	141,560,565.	177,730,506.	699,708,466.
<b>8</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources .....	-59,007.	535,540.	1,343,162.	2,450,146.	4,394,752.	8,664,593.
<b>9</b> Net income from unrelated business activities, whether or not the business is regularly carried on .....						
<b>10</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.) .....	799,478.	156,060.	394,530.	561,074.	843,116.	2,754,258.
<b>11 Total support.</b> Add lines 7 through 10						711,127,317.
<b>12</b> Gross receipts from related activities, etc. (see instructions) .....					<b>12</b>	145,515,818.
<b>13 First 5 years.</b> If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and <b>stop here</b> .....						<input type="checkbox"/>

**Section C. Computation of Public Support Percentage**

<b>14</b> Public support percentage for 2023 (line 6, column (f), divided by line 11, column (f)) .....	<b>14</b>	89.12	%
<b>15</b> Public support percentage from 2022 Schedule A, Part II, line 14 .....	<b>15</b>	89.42	%
<b>16a 33 1/3% support test - 2023.</b> If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and <b>stop here.</b> The organization qualifies as a publicly supported organization .....			<input checked="" type="checkbox"/>
<b>b 33 1/3% support test - 2022.</b> If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and <b>stop here.</b> The organization qualifies as a publicly supported organization .....			<input type="checkbox"/>
<b>17a 10% -facts-and-circumstances test - 2023.</b> If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and <b>stop here.</b> Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization .....			<input type="checkbox"/>
<b>b 10% -facts-and-circumstances test - 2022.</b> If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and <b>stop here.</b> Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization .....			<input type="checkbox"/>
<b>18 Private foundation.</b> If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions .....			<input type="checkbox"/>

Part III Support Schedule for Organizations Described in Section 509(a)(2)

(Complete only if you checked the box on line 10 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.)

Section A. Public Support

Table with 7 columns: (a) 2019, (b) 2020, (c) 2021, (d) 2022, (e) 2023, (f) Total. Rows include: 1 Gifts, grants, contributions, and membership fees received; 2 Gross receipts from admissions, merchandise sold or services performed; 3 Gross receipts from activities that are not an unrelated trade or business; 4 Tax revenues levied for the organization's benefit; 5 The value of services or facilities furnished by a governmental unit; 6 Total. Add lines 1 through 5; 7a Amounts included on lines 1, 2, and 3 received from disqualified persons; 7b Amounts included on lines 2 and 3 received from other than disqualified persons; 8 Public support. (Subtract line 7c from line 6.)

Section B. Total Support

Table with 7 columns: (a) 2019, (b) 2020, (c) 2021, (d) 2022, (e) 2023, (f) Total. Rows include: 9 Amounts from line 6; 10a Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources; 10b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975; 10c Add lines 10a and 10b; 11 Net income from unrelated business activities not included on line 10b, whether or not the business is regularly carried on; 12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.); 13 Total support. (Add lines 9, 10c, 11, and 12.)

14 First 5 years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here

Section C. Computation of Public Support Percentage

Table with 2 columns: Line number, Percentage. Row 15: Public support percentage for 2023 (line 8, column (f), divided by line 13, column (f)) 15 %; Row 16: Public support percentage from 2022 Schedule A, Part III, line 15 16 %

Section D. Computation of Investment Income Percentage

Table with 2 columns: Line number, Percentage. Row 17: Investment income percentage for 2023 (line 10c, column (f), divided by line 13, column (f)) 17 %; Row 18: Investment income percentage from 2022 Schedule A, Part III, line 17 18 %

19a 33 1/3% support tests - 2023. If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and stop here. The organization qualifies as a publicly supported organization

b 33 1/3% support tests - 2022. If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3%, and line 18 is not more than 33 1/3%, check this box and stop here. The organization qualifies as a publicly supported organization

20 Private foundation. If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions

**Part IV Supporting Organizations**

(Complete only if you checked a box on line 12 of Part I. If you checked box 12a, Part I, complete Sections A and B. If you checked box 12b, Part I, complete Sections A and C. If you checked box 12c, Part I, complete Sections A, D, and E. If you checked box 12d, Part I, complete Sections A and D, and complete Part V.)

**Section A. All Supporting Organizations**

	Yes	No
<b>1</b> Are all of the organization's supported organizations listed by name in the organization's governing documents? <i>If "No," describe in Part VI how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain.</i>		
<b>2</b> Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? <i>If "Yes," explain in Part VI how the organization determined that the supported organization was described in section 509(a)(1) or (2).</i>		
<b>3a</b> Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? <i>If "Yes," answer lines 3b and 3c below.</i>		
<b>b</b> Did the organization confirm that each supported organization qualified under section 501(c)(4), (5), or (6) and satisfied the public support tests under section 509(a)(2)? <i>If "Yes," describe in Part VI when and how the organization made the determination.</i>		
<b>c</b> Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? <i>If "Yes," explain in Part VI what controls the organization put in place to ensure such use.</i>		
<b>4a</b> Was any supported organization not organized in the United States ("foreign supported organization")? <i>If "Yes," and if you checked box 12a or 12b in Part I, answer lines 4b and 4c below.</i>		
<b>b</b> Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? <i>If "Yes," describe in Part VI how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations.</i>		
<b>c</b> Did the organization support any foreign supported organization that does not have an IRS determination under sections 501(c)(3) and 509(a)(1) or (2)? <i>If "Yes," explain in Part VI what controls the organization used to ensure that all support to the foreign supported organization was used exclusively for section 170(c)(2)(B) purposes.</i>		
<b>5a</b> Did the organization add, substitute, or remove any supported organizations during the tax year? <i>If "Yes," answer lines 5b and 5c below (if applicable). Also, provide detail in Part VI, including (i) the names and EIN numbers of the supported organizations added, substituted, or removed; (ii) the reasons for each such action; (iii) the authority under the organization's organizing document authorizing such action; and (iv) how the action was accomplished (such as by amendment to the organizing document).</i>		
<b>b Type I or Type II only.</b> Was any added or substituted supported organization part of a class already designated in the organization's organizing document?		
<b>c Substitutions only.</b> Was the substitution the result of an event beyond the organization's control?		
<b>6</b> Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (i) its supported organizations, (ii) individuals that are part of the charitable class benefited by one or more of its supported organizations, or (iii) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? <i>If "Yes," provide detail in Part VI.</i>		
<b>7</b> Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (as defined in section 4958(c)(3)(C)), a family member of a substantial contributor, or a 35% controlled entity with regard to a substantial contributor? <i>If "Yes," complete Part I of Schedule L (Form 990).</i>		
<b>8</b> Did the organization make a loan to a disqualified person (as defined in section 4958) not described on line 7? <i>If "Yes," complete Part I of Schedule L (Form 990).</i>		
<b>9a</b> Was the organization controlled directly or indirectly at any time during the tax year by one or more disqualified persons, as defined in section 4946 (other than foundation managers and organizations described in section 509(a)(1) or (2))? <i>If "Yes," provide detail in Part VI.</i>		
<b>b</b> Did one or more disqualified persons (as defined on line 9a) hold a controlling interest in any entity in which the supporting organization had an interest? <i>If "Yes," provide detail in Part VI.</i>		
<b>c</b> Did a disqualified person (as defined on line 9a) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? <i>If "Yes," provide detail in Part VI.</i>		
<b>10a</b> Was the organization subject to the excess business holdings rules of section 4943 because of section 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? <i>If "Yes," answer line 10b below.</i>		
<b>b</b> Did the organization have any excess business holdings in the tax year? <i>(Use Schedule C, Form 4720, to determine whether the organization had excess business holdings.)</i>		

Part IV Supporting Organizations (continued)

Table with 3 columns: Question, Yes, No. Row 11: Has the organization accepted a gift or contribution from any of the following persons? Sub-rows 11a, 11b, 11c.

Section B. Type I Supporting Organizations

Table with 3 columns: Question, Yes, No. Row 1: Did the governing body, members of the governing body, officers acting in their official capacity, or membership of one or more supported organizations have the power to regularly appoint or elect at least a majority of the organization's officers, directors, or trustees at all times during the tax year? Row 2: Did the organization operate for the benefit of any supported organization other than the supported organization(s) that operated, supervised, or controlled the supporting organization?

Section C. Type II Supporting Organizations

Table with 3 columns: Question, Yes, No. Row 1: Were a majority of the organization's directors or trustees during the tax year also a majority of the directors or trustees of each of the organization's supported organization(s)?

Section D. All Type III Supporting Organizations

Table with 3 columns: Question, Yes, No. Row 1: Did the organization provide to each of its supported organizations, by the last day of the fifth month of the organization's tax year, (i) a written notice describing the type and amount of support provided during the prior tax year, (ii) a copy of the Form 990 that was most recently filed as of the date of notification, and (iii) copies of the organization's governing documents in effect on the date of notification, to the extent not previously provided? Row 2: Were any of the organization's officers, directors, or trustees either (i) appointed or elected by the supported organization(s) or (ii) serving on the governing body of a supported organization? Row 3: By reason of the relationship described on line 2, above, did the organization's supported organizations have a significant voice in the organization's investment policies and in directing the use of the organization's income or assets at all times during the tax year?

Section E. Type III Functionally Integrated Supporting Organizations

Table with 3 columns: Question, Yes, No. Row 1: Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions). Sub-rows a, b, c. Row 2: Activities Test. Answer lines 2a and 2b below. Sub-rows a, b. Row 3: Parent of Supported Organizations. Answer lines 3a and 3b below. Sub-rows a, b.

**Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations**

1  Check here if the organization satisfied the Integral Part Test as a qualifying trust on Nov. 20, 1970 ( *explain in Part VI*). **See instructions.**  
 All other Type III non-functionally integrated supporting organizations must complete Sections A through E.

<b>Section A - Adjusted Net Income</b>		(A) Prior Year	(B) Current Year (optional)
1	Net short-term capital gain	1	
2	Recoveries of prior-year distributions	2	
3	Other gross income (see instructions)	3	
4	Add lines 1 through 3.	4	
5	Depreciation and depletion	5	
6	Portion of operating expenses paid or incurred for production or collection of gross income or for management, conservation, or maintenance of property held for production of income (see instructions)	6	
7	Other expenses (see instructions)	7	
8	<b>Adjusted Net Income</b> (subtract lines 5, 6, and 7 from line 4)	8	

<b>Section B - Minimum Asset Amount</b>		(A) Prior Year	(B) Current Year (optional)
1	Aggregate fair market value of all non-exempt-use assets (see instructions for short tax year or assets held for part of year):		
a	Average monthly value of securities	1a	
b	Average monthly cash balances	1b	
c	Fair market value of other non-exempt-use assets	1c	
d	<b>Total</b> (add lines 1a, 1b, and 1c)	1d	
e	<b>Discount</b> claimed for blockage or other factors ( <i>explain in detail in Part VI</i> ):		
2	Acquisition indebtedness applicable to non-exempt-use assets	2	
3	Subtract line 2 from line 1d.	3	
4	Cash deemed held for exempt use. Enter 0.015 of line 3 (for greater amount, see instructions).	4	
5	Net value of non-exempt-use assets (subtract line 4 from line 3)	5	
6	Multiply line 5 by 0.035.	6	
7	Recoveries of prior-year distributions	7	
8	<b>Minimum Asset Amount</b> (add line 7 to line 6)	8	

<b>Section C - Distributable Amount</b>			Current Year
1	Adjusted net income for prior year (from Section A, line 8, column A)	1	
2	Enter 0.85 of line 1.	2	
3	Minimum asset amount for prior year (from Section B, line 8, column A)	3	
4	Enter greater of line 2 or line 3.	4	
5	Income tax imposed in prior year	5	
6	<b>Distributable Amount.</b> Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions).	6	
7	<input type="checkbox"/> Check here if the current year is the organization's first as a non-functionally integrated Type III supporting organization (see instructions).		

**Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations** (continued)

<b>Section D - Distributions</b>		<b>Current Year</b>
<b>1</b>	Amounts paid to supported organizations to accomplish exempt purposes	<b>1</b>
<b>2</b>	Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity	<b>2</b>
<b>3</b>	Administrative expenses paid to accomplish exempt purposes of supported organizations	<b>3</b>
<b>4</b>	Amounts paid to acquire exempt-use assets	<b>4</b>
<b>5</b>	Qualified set-aside amounts (prior IRS approval required - <i>provide details in Part VI</i> )	<b>5</b>
<b>6</b>	Other distributions ( <i>describe in Part VI</i> ). See instructions.	<b>6</b>
<b>7</b>	<b>Total annual distributions.</b> Add lines 1 through 6.	<b>7</b>
<b>8</b>	Distributions to attentive supported organizations to which the organization is responsive ( <i>provide details in Part VI</i> ). See instructions.	<b>8</b>
<b>9</b>	Distributable amount for 2023 from Section C, line 6	<b>9</b>
<b>10</b>	Line 8 amount divided by line 9 amount	<b>10</b>

<b>Section E - Distribution Allocations</b> (see instructions)	<b>(i) Excess Distributions</b>	<b>(ii) Underdistributions Pre-2023</b>	<b>(iii) Distributable Amount for 2023</b>
<b>1</b> Distributable amount for 2023 from Section C, line 6			
<b>2</b> Underdistributions, if any, for years prior to 2023 (reasonable cause required - <i>explain in Part VI</i> ). See instructions.			
<b>3</b> Excess distributions carryover, if any, to 2023			
<b>a</b> From 2018			
<b>b</b> From 2019			
<b>c</b> From 2020			
<b>d</b> From 2021			
<b>e</b> From 2022			
<b>f</b> <b>Total</b> of lines 3a through 3e			
<b>g</b> Applied to underdistributions of prior years			
<b>h</b> Applied to 2023 distributable amount			
<b>i</b> Carryover from 2018 not applied (see instructions)			
<b>j</b> Remainder. Subtract lines 3g, 3h, and 3i from line 3f.			
<b>4</b> Distributions for 2023 from Section D, line 7: \$			
<b>a</b> Applied to underdistributions of prior years			
<b>b</b> Applied to 2023 distributable amount			
<b>c</b> Remainder. Subtract lines 4a and 4b from line 4.			
<b>5</b> Remaining underdistributions for years prior to 2023, if any. Subtract lines 3g and 4a from line 2. For result greater than zero, <i>explain in Part VI</i> . See instructions.			
<b>6</b> Remaining underdistributions for 2023. Subtract lines 3h and 4b from line 1. For result greater than zero, <i>explain in Part VI</i> . See instructions.			
<b>7</b> <b>Excess distributions carryover to 2024.</b> Add lines 3j and 4c.			
<b>8</b> Breakdown of line 7:			
<b>a</b> Excess from 2019			
<b>b</b> Excess from 2020			
<b>c</b> Excess from 2021			
<b>d</b> Excess from 2022			
<b>e</b> Excess from 2023			

Schedule A (Form 990) 2023

**Part VI** **Supplemental Information.** Provide the explanations required by Part II, line 10; Part II, line 17a or 17b; Part III, line 12; Part IV, Section A, lines 1, 2, 3b, 3c, 4b, 4c, 5a, 6, 9a, 9b, 9c, 11a, 11b, and 11c; Part IV, Section B, lines 1 and 2; Part IV, Section C, line 1; Part IV, Section D, lines 2 and 3; Part IV, Section E, lines 1c, 2a, 2b, 3a, and 3b; Part V, line 1; Part V, Section B, line 1e; Part V, Section D, lines 5, 6, and 8; and Part V, Section E, lines 2, 5, and 6. Also complete this part for any additional information.  
 (See instructions.)

SCHEDULE A, PART II, LINE 10, EXPLANATION FOR OTHER INCOME:

OTHER INCOME

2019 AMOUNT: \$ 799,478.

2020 AMOUNT: \$ 156,060.

2021 AMOUNT: \$ 394,530.

2022 AMOUNT: \$ 561,074.

2023 AMOUNT: \$ 843,116.

**Schedule B**  
**(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Schedule of Contributors**

Attach to Form 990, 990-EZ, or 990-PF.  
Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.

OMB No. 1545-0047

**2023**

Name of the organization

THE ASPEN INSTITUTE, INC.

Employer identification number

84-0399006

Organization type (check one):

**Filers of:**

**Section:**

Form 990 or 990-EZ

501(c)( 3 ) (enter number) organization

4947(a)(1) nonexempt charitable trust **not** treated as a private foundation

527 political organization

Form 990-PF

501(c)(3) exempt private foundation

4947(a)(1) nonexempt charitable trust treated as a private foundation

501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.

**Note:** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

**General Rule**

For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

**Special Rules**

For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** \$5,000; or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h; or (ii) Form 990-EZ, line 1. Complete Parts I and II.

For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I (entering "N/A" in column (b) instead of the contributor name and address), II, and III.

For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year ..... \$ \_\_\_\_\_

**Caution:** An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990), but it **must** answer "No" on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990).

For Paperwork Reduction Act Notice, see the instructions for Form 990, 990-EZ, or 990-PF.

Schedule B (Form 990) (2023)



Name of organization  <b>THE ASPEN INSTITUTE, INC.</b>	<b>Employer identification number</b>  84-0399006
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**Part I Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	<hr/> <hr/> <hr/>	\$ 11,830,977.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions.)
2	<hr/> <hr/> <hr/>	\$ 7,747,418.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
3	<hr/> <hr/> <hr/>	\$ 5,378,274.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
4	<hr/> <hr/> <hr/>	\$ 5,104,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
5	<hr/> <hr/> <hr/>	\$ 4,409,369.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
6	<hr/> <hr/> <hr/>	\$ 4,187,075.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions.)

Name of organization  <b>THE ASPEN INSTITUTE, INC.</b>	<b>Employer identification number</b>  84-0399006
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**Part I Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
7	<hr/> <hr/> <hr/>	\$ 3,775,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
8	<hr/> <hr/> <hr/>	\$ 3,567,096.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
	<hr/> <hr/> <hr/>	\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
	<hr/> <hr/> <hr/>	\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
	<hr/> <hr/> <hr/>	\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
	<hr/> <hr/> <hr/>	\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
	<hr/> <hr/> <hr/>	\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)

Name of organization  <b>THE ASPEN INSTITUTE, INC.</b>	<b>Employer identification number</b>  84-0399006
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**Part II Noncash Property** (see instructions). Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
1	28,573 SHARES OF AMAZON.COM _____ _____ _____	\$ 3,099,885.	05/16/23
6	30,022 SHARES OF ALPHABET INC CL A _____ _____ _____	\$ 4,187,075.	12/29/23
	_____ _____ _____	\$ _____	_____
	_____ _____ _____	\$ _____	_____
	_____ _____ _____	\$ _____	_____
	_____ _____ _____	\$ _____	_____

Name of organization  <b>THE ASPEN INSTITUTE, INC.</b>	Employer identification number  84-0399006
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**Part III** Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this info. once.) \$ \_\_\_\_\_  
Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
<b>(e) Transfer of gift</b>			
Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee	
<b>(e) Transfer of gift</b>			
Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee	
<b>(e) Transfer of gift</b>			
Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee	
<b>(e) Transfer of gift</b>			
Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee	
<b>(e) Transfer of gift</b>			
Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee	

**SCHEDULE C**  
**(Form 990)**

**Political Campaign and Lobbying Activities**

OMB No. 1545-0047

**2023**

Open to Public Inspection

Department of the Treasury  
Internal Revenue Service

**For Organizations Exempt From Income Tax Under Section 501(c) and Section 527**  
**Complete if the organization is described below. Attach to Form 990 or Form 990-EZ.**  
**Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.**

**If the organization answered "Yes" on Form 990, Part IV, line 3, or Form 990-EZ, Part V, line 46 (Political Campaign Activities), then:**

- Section 501(c)(3) organizations: Complete Parts I-A and B. Do not complete Part I-C.
- Section 501(c) (other than section 501(c)(3)) organizations: Complete Parts I-A and C below. Do not complete Part I-B.
- Section 527 organizations: Complete Part I-A only.

**If the organization answered "Yes" on Form 990, Part IV, line 4, or Form 990-EZ, Part VI, line 47 (Lobbying Activities), then:**

- Section 501(c)(3) organizations that have filed Form 5768 (election under section 501(h)): Complete Part II-A. Do not complete Part II-B.
- Section 501(c)(3) organizations that have NOT filed Form 5768 (election under section 501(h)): Complete Part II-B. Do not complete Part II-A.

**If the organization answered "Yes" on Form 990, Part IV, line 5 (Proxy Tax) (see separate instructions) or Form 990-EZ, Part V, line 35c (Proxy Tax) (see separate instructions), then:**

- Section 501(c)(4), (5), or (6) organizations: Complete Part III.

Name of organization <b>THE ASPEN INSTITUTE, INC.</b>	Employer identification number <b>84-0399006</b>
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**Part I-A Complete if the organization is exempt under section 501(c) or is a section 527 organization.**

- 1 Provide a description of the organization's direct and indirect political campaign activities in Part IV.
- 2 Political campaign activity expenditures ..... \$ \_\_\_\_\_
- 3 Volunteer hours for political campaign activities ..... \_\_\_\_\_

**Part I-B Complete if the organization is exempt under section 501(c)(3).**

- 1 Enter the amount of any excise tax incurred by the organization under section 4955 ..... \$ \_\_\_\_\_
- 2 Enter the amount of any excise tax incurred by organization managers under section 4955 ..... \$ \_\_\_\_\_
- 3 If the organization incurred a section 4955 tax, did it file Form 4720 for this year? .....  Yes  No
- 4a Was a correction made? .....  Yes  No
- b If "Yes," describe in Part IV.

**Part I-C Complete if the organization is exempt under section 501(c), except section 501(c)(3).**

- 1 Enter the amount directly expended by the filing organization for section 527 exempt function activities ..... \$ \_\_\_\_\_
- 2 Enter the amount of the filing organization's funds contributed to other organizations for section 527 exempt function activities ..... \$ \_\_\_\_\_
- 3 Total exempt function expenditures. Add lines 1 and 2. Enter here and on Form 1120-POL, line 17b ..... \$ \_\_\_\_\_
- 4 Did the filing organization file **Form 1120-POL** for this year? .....  Yes  No
- 5 Enter the names, addresses, and employer identification number (EIN) of all section 527 political organizations to which the filing organization made payments. For each organization listed, enter the amount paid from the filing organization's funds. Also enter the amount of political contributions received that were promptly and directly delivered to a separate political organization, such as a separate segregated fund or a political action committee (PAC). If additional space is needed, provide information in Part IV.

(a) Name	(b) Address	(c) EIN	(d) Amount paid from filing organization's funds. If none, enter -0-.	(e) Amount of political contributions received and promptly and directly delivered to a separate political organization. If none, enter -0-.

**Part II-A Complete if the organization is exempt under section 501(c)(3) and filed Form 5768 (election under section 501(h)).**

- A Check  if the filing organization belongs to an affiliated group (and list in Part IV each affiliated group member's name, address, EIN, expenses, and share of excess lobbying expenditures).
- B Check  if the filing organization checked box A and "limited control" provisions apply.

<b>Limits on Lobbying Expenditures</b> (The term "expenditures" means amounts paid or incurred.)	(a) Filing organization's totals	(b) Affiliated group totals												
<b>1a</b> Total lobbying expenditures to influence public opinion (grassroots lobbying) .....														
<b>b</b> Total lobbying expenditures to influence a legislative body (direct lobbying) .....														
<b>c</b> Total lobbying expenditures (add lines 1a and 1b) .....														
<b>d</b> Other exempt purpose expenditures .....														
<b>e</b> Total exempt purpose expenditures (add lines 1c and 1d) .....														
<b>f</b> Lobbying nontaxable amount. Enter the amount from the following table in both columns.														
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 30%;">If the amount on line 1e, column (a) or (b) is:</th> <th style="width: 70%;">The lobbying nontaxable amount is:</th> </tr> </thead> <tbody> <tr> <td>not over \$500,000,</td> <td>20% of the amount on line 1e.</td> </tr> <tr> <td>over \$500,000 but not over \$1,000,000,</td> <td>\$100,000 plus 15% of the excess over \$500,000.</td> </tr> <tr> <td>over \$1,000,000 but not over \$1,500,000,</td> <td>\$175,000 plus 10% of the excess over \$1,000,000.</td> </tr> <tr> <td>over \$1,500,000 but not over \$17,000,000,</td> <td>\$225,000 plus 5% of the excess over \$1,500,000.</td> </tr> <tr> <td>over \$17,000,000,</td> <td>\$1,000,000.</td> </tr> </tbody> </table>	If the amount on line 1e, column (a) or (b) is:	The lobbying nontaxable amount is:	not over \$500,000,	20% of the amount on line 1e.	over \$500,000 but not over \$1,000,000,	\$100,000 plus 15% of the excess over \$500,000.	over \$1,000,000 but not over \$1,500,000,	\$175,000 plus 10% of the excess over \$1,000,000.	over \$1,500,000 but not over \$17,000,000,	\$225,000 plus 5% of the excess over \$1,500,000.	over \$17,000,000,	\$1,000,000.		
If the amount on line 1e, column (a) or (b) is:	The lobbying nontaxable amount is:													
not over \$500,000,	20% of the amount on line 1e.													
over \$500,000 but not over \$1,000,000,	\$100,000 plus 15% of the excess over \$500,000.													
over \$1,000,000 but not over \$1,500,000,	\$175,000 plus 10% of the excess over \$1,000,000.													
over \$1,500,000 but not over \$17,000,000,	\$225,000 plus 5% of the excess over \$1,500,000.													
over \$17,000,000,	\$1,000,000.													
<b>g</b> Grassroots nontaxable amount (enter 25% of line 1f) .....														
<b>h</b> Subtract line 1g from line 1a. If zero or less, enter -0- .....														
<b>i</b> Subtract line 1f from line 1c. If zero or less, enter -0- .....														
<b>j</b> If there is an amount other than zero on either line 1h or line 1i, did the organization file Form 4720 reporting section 4911 tax for this year? .....	<input type="checkbox"/> Yes	<input type="checkbox"/> No												

**4-Year Averaging Period Under Section 501(h)**  
(Some organizations that made a section 501(h) election do not have to complete all of the five columns below. See the separate instructions for lines 2a through 2f.)

<b>Lobbying Expenditures During 4-Year Averaging Period</b>					
Calendar year (or fiscal year beginning in)	(a) 2020	(b) 2021	(c) 2022	(d) 2023	(e) Total
<b>2a</b> Lobbying nontaxable amount					
<b>b</b> Lobbying ceiling amount (150% of line 2a, column(e))					
<b>c</b> Total lobbying expenditures					
<b>d</b> Grassroots nontaxable amount					
<b>e</b> Grassroots ceiling amount (150% of line 2d, column (e))					
<b>f</b> Grassroots lobbying expenditures					

**Part II-B Complete if the organization is exempt under section 501(c)(3) and has NOT filed Form 5768 (election under section 501(h)).**

	(a)		(b)
	Yes	No	Amount
<b>1</b> During the year, did the filing organization attempt to influence foreign, national, state, or local legislation, including any attempt to influence public opinion on a legislative matter or referendum, through the use of:			
<b>a</b> Volunteers?		X	
<b>b</b> Paid staff or management (include compensation in expenses reported on lines 1c through 1i)?	X		
<b>c</b> Media advertisements?		X	
<b>d</b> Mailings to members, legislators, or the public?		X	
<b>e</b> Publications, or published or broadcast statements?		X	
<b>f</b> Grants to other organizations for lobbying purposes?		X	
<b>g</b> Direct contact with legislators, their staffs, government officials, or a legislative body?	X		8,349.
<b>h</b> Rallies, demonstrations, seminars, conventions, speeches, lectures, or any similar means?	X		
<b>i</b> Other activities?	X		
<b>j</b> Total. Add lines 1c through 1i			8,349.
<b>2a</b> Did the activities in line 1 cause the organization to not be described in section 501(c)(3)?		X	
<b>b</b> If "Yes," enter the amount of any tax incurred under section 4912			
<b>c</b> If "Yes," enter the amount of any tax incurred by organization managers under section 4912			
<b>d</b> If the filing organization incurred a section 4912 tax, did it file Form 4720 for this year?			

**Part III-A Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), or section 501(c)(6).**

	Yes	No
<b>1</b> Were substantially all (90% or more) dues received nondeductible by members?	1	
<b>2</b> Did the organization make only in-house lobbying expenditures of \$2,000 or less?	2	
<b>3</b> Did the organization agree to carry over lobbying and political campaign activity expenditures from the prior year?	3	

**Part III-B Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), or section 501(c)(6) and if either (a) BOTH Part III-A, lines 1 and 2, are answered "No" OR (b) Part III-A, line 3, is answered "Yes."**

<b>1</b> Dues, assessments and similar amounts from members	1	
<b>2</b> Section 162(e) nondeductible lobbying and political expenditures (do not include amounts of political expenses for which the section 527(f) tax was paid).		
<b>a</b> Current year	2a	
<b>b</b> Carryover from last year	2b	
<b>c</b> Total	2c	
<b>3</b> Aggregate amount reported in section 6033(e)(1)(A) notices of nondeductible section 162(e) dues	3	
<b>4</b> If notices were sent and the amount on line 2c exceeds the amount on line 3, what portion of the excess does the organization agree to carryover to the reasonable estimate of nondeductible lobbying and political expenditures next year?	4	
<b>5</b> Taxable amount of lobbying and political expenditures. See instructions	5	

**Part IV Supplemental Information**

Provide the descriptions required for Part I-A, line 1; Part I-B, line 4; Part I-C, line 5; Part II-A (affiliated group list); Part II-A, lines 1 and 2 (see instructions); and Part II-B, line 1. Also, complete this part for any additional information.

PART II-B, LINE 1, LOBBYING ACTIVITIES:

ALLOCATED SALARY EXPENSE FROM COMMUNICATION WITH LEGISLATORS REGARDING

PENDING LEGISLATION.

**SCHEDULE D**  
**(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Supplemental Financial Statements**

Complete if the organization answered "Yes" on Form 990,  
Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.  
Attach to Form 990.

Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

OMB No. 1545-0047

**2023**

Open to Public  
Inspection

Name of the organization **THE ASPEN INSTITUTE, INC.** Employer identification number **84-0399006**

**Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts.** Complete if the organization answered "Yes" on Form 990, Part IV, line 6.

	(a) Donor advised funds	(b) Funds and other accounts
1 Total number at end of year		
2 Aggregate value of contributions to (during year)		
3 Aggregate value of grants from (during year)		
4 Aggregate value at end of year		
5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit?	<input type="checkbox"/> Yes	<input type="checkbox"/> No

**Part II Conservation Easements.** Complete if the organization answered "Yes" on Form 990, Part IV, line 7.

1 Purpose(s) of conservation easements held by the organization (check all that apply).

Preservation of land for public use (for example, recreation or education)  Preservation of a historically important land area

Protection of natural habitat  Preservation of a certified historic structure

Preservation of open space

2 Complete lines 2a through 2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year.

	Held at the End of the Tax Year
a Total number of conservation easements	1
b Total acreage restricted by conservation easements	13.50
c Number of conservation easements on a certified historic structure included on line 2a	
d Number of conservation easements included on line 2c acquired after July 25, 2006, and not on a historic structure listed in the National Register	

3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year \_\_\_\_\_

4 Number of states where property subject to conservation easement is located 1

5 Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds?  Yes  No

6 Staff and volunteer hours devoted to monitoring, inspecting, handling of violations, and enforcing conservation easements during the year \_\_\_\_\_

7 Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year \_\_\_\_\_

8 Does each conservation easement reported on line 2d above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)?  Yes  No

9 In Part XIII, describe how the organization reports conservation easements in its revenue and expense statement and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements.

**Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets.** Complete if the organization answered "Yes" on Form 990, Part IV, line 8.

1a If the organization elected, as permitted under FASB ASC 958, not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide in Part XIII the text of the footnote to its financial statements that describes these items.

b If the organization elected, as permitted under FASB ASC 958, to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items.

(i) Revenue included on Form 990, Part VIII, line 1 \$ \_\_\_\_\_

(ii) Assets included in Form 990, Part X \$ 1,096,267.

2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under FASB ASC 958 relating to these items:

a Revenue included on Form 990, Part VIII, line 1 \$ \_\_\_\_\_

b Assets included in Form 990, Part X \$ \_\_\_\_\_

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990. Schedule D (Form 990) 2023





**Part VII Investments - Other Securities**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11b. See Form 990, Part X, line 12.

(a) Description of security or category (including name of security)	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1) Financial derivatives .....		
(2) Closely held equity interests .....		
(3) Other		
(A) LIMITED PARTNERSHIPS	173,115,653.	END-OF-YEAR MARKET VALUE
(B) INVESTMENT CONTRACT	1,294,363.	END-OF-YEAR MARKET VALUE
(C)		
(D)		
(E)		
(F)		
(G)		
(H)		
<b>Total.</b> (Col. (b) must equal Form 990, Part X, line 12, col. (B))	174,410,016.	

**Part VIII Investments - Program Related.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11c. See Form 990, Part X, line 13.

(a) Description of investment	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1)		
(2)		
(3)		
(4)		
(5)		
(6)		
(7)		
(8)		
(9)		
<b>Total.</b> (Col. (b) must equal Form 990, Part X, line 13, col. (B))		

**Part IX Other Assets**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11d. See Form 990, Part X, line 15.

(a) Description	(b) Book value
(1) DEFERRED TAX ASSET	1,841,267.
(2) SECURITY DEPOSITS	854,377.
(3) INVESTMENT RELATED RECEIVABLES	5,852,000.
(4) RIGHT OF USE ASSET - OPERATING	43,349,173.
(5)	
(6)	
(7)	
(8)	
(9)	
<b>Total.</b> (Column (b) must equal Form 990, Part X, line 15, col. (B))	51,896,817.

**Part X Other Liabilities**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11e or 11f. See Form 990, Part X, line 25.

1. (a) Description of liability	(b) Book value
(1) Federal income taxes	
(2) DEFERRED COMPENSATION	8,400,625.
(3) LEASE LIABILITY - OPERATING	55,935,786.
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
<b>Total.</b> (Column (b) must equal Form 990, Part X, line 25, col. (B))	64,336,411.

2. Liability for uncertain tax positions. In Part XIII, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FASB ASC 740. Check here if the text of the footnote has been provided in Part XIII ...

**Part XI Reconciliation of Revenue per Audited Financial Statements With Revenue per Return**

Complete if the organization answered "Yes" on Form 990, Part IV, line 12a.

<b>1</b>	Total revenue, gains, and other support per audited financial statements		<b>1</b>	262,434,738.
<b>2</b>	Amounts included on line 1 but not on Form 990, Part VIII, line 12:			
<b>a</b>	Net unrealized gains (losses) on investments	<b>2a</b> 29,416,939.		
<b>b</b>	Donated services and use of facilities	<b>2b</b> 393,470.		
<b>c</b>	Recoveries of prior year grants	<b>2c</b>		
<b>d</b>	Other (Describe in Part XIII.)	<b>2d</b>		
<b>e</b>	Add lines <b>2a</b> through <b>2d</b>		<b>2e</b>	29,810,409.
<b>3</b>	Subtract line <b>2e</b> from line <b>1</b>		<b>3</b>	232,624,329.
<b>4</b>	Amounts included on Form 990, Part VIII, line 12, but not on line 1:			
<b>a</b>	Investment expenses not included on Form 990, Part VIII, line 7b	<b>4a</b> 1,025,844.		
<b>b</b>	Other (Describe in Part XIII.)	<b>4b</b> -1,540,838.		
<b>c</b>	Add lines <b>4a</b> and <b>4b</b>		<b>4c</b>	-514,994.
<b>5</b>	Total revenue. Add lines <b>3</b> and <b>4c</b> . (This must equal Form 990, Part I, line 12.)		<b>5</b>	232,109,335.

**Part XII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return**

Complete if the organization answered "Yes" on Form 990, Part IV, line 12a.

<b>1</b>	Total expenses and losses per audited financial statements		<b>1</b>	226,334,906.
<b>2</b>	Amounts included on line 1 but not on Form 990, Part IX, line 25:			
<b>a</b>	Donated services and use of facilities	<b>2a</b> 393,470.		
<b>b</b>	Prior year adjustments	<b>2b</b>		
<b>c</b>	Other losses	<b>2c</b>		
<b>d</b>	Other (Describe in Part XIII.)	<b>2d</b> 1,228,605.		
<b>e</b>	Add lines <b>2a</b> through <b>2d</b>		<b>2e</b>	1,622,075.
<b>3</b>	Subtract line <b>2e</b> from line <b>1</b>		<b>3</b>	224,712,831.
<b>4</b>	Amounts included on Form 990, Part IX, line 25, but not on line 1:			
<b>a</b>	Investment expenses not included on Form 990, Part VIII, line 7b	<b>4a</b> 1,025,844.		
<b>b</b>	Other (Describe in Part XIII.)	<b>4b</b>		
<b>c</b>	Add lines <b>4a</b> and <b>4b</b>		<b>4c</b>	1,025,844.
<b>5</b>	Total expenses. Add lines <b>3</b> and <b>4c</b> . (This must equal Form 990, Part I, line 18.)		<b>5</b>	225,738,675.

**Part XIII Supplemental Information**

Provide the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4; Part IV, lines 1b and 2b; Part V, line 4; Part X, line 2; Part XI, lines 2d and 4b; and Part XII, lines 2d and 4b. Also complete this part to provide any additional information.

PART II, LINE 5:

THE INSTITUTE CONTINUES TO COMPLY WITH TERMS OF CONTRACT GOVERNING THE CONSERVATION EASEMENT HELD, WHICH INCLUDES PROTECTION OF NATURAL HABITAT.

PART II, LINE 9:

THE INSTITUTE HOLDS A CONSERVATION EASEMENT ON THE BALANCE SHEET AND THE CONTRIBUTED PARCEL OF LAND WAS BOOKED AS REVENUE FOR THE YEAR IT WAS GIFTED.

PART III, LINE 4:

AT OUR ASPEN MEADOWS CAMPUS, ASPEN, COLORADO, WE HAVE A LARGE COLLECTION OF ART THAT IS ON DISPLAY BOTH IN GALLERIES AND PUBLIC SPACES. IT IS

**Part XIII** Supplemental Information (continued)

ENJOYED BY GUESTS WHO VISIT AND STAY AT OUR RESORT. THIS ART COLLECTION IS

MADE UP OF PHOTOS FROM FRANZ BERKO, OFFICIAL PHOTOGRAPHER FOR THE

INSTITUTE, AS WELL AS ART IN VARIOUS MEDIUMS BY HERBERT BAYER. BAYER WAS

THE ARCHITECT FOR OUR CAMPUS, AND ALSO DESIGNED SEVERAL OF THE LAND FORMS

THROUGHOUT OUR PROPERTY. ONE GALLERY ON PROPERTY IS DEDICATED SOLELY TO

THE WORK OF BAYER. ALTHOUGH THE ARTWORK IS HELD ON THE BOOKS AT COST, IT

HAS AN INSURED FAIR VALUE OF \$3.1 MILLION.

PART V, LINE 4:

4.5% OF A 12 QUARTER ROLLING AVERAGE OF THE FUNDS ARE USED TO FUND

PROGRAMMATIC WORK OF THE INSTITUTE.

PART X, LINE 2:

MANAGEMENT OF THE INSTITUTE BELIEVES THAT IT HAS NO MATERIAL UNCERTAINTY

IN INCOME TAXES AND, ACCORDINGLY, IT WILL NOT RECOGNIZE ANY LIABILITY FOR

UNRECOGNIZED TAXES IN ITS FINANCIAL STATEMENTS.

PART XI, LINE 4B - OTHER ADJUSTMENTS:

SPECIAL EVENT EXPENSES	-1,371,630.
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RENTAL EXPENSES	-169,208.
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TOTAL TO SCHEDULE D, PART XI, LINE 4B	-1,540,838.
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PART XII, LINE 2D - OTHER ADJUSTMENTS:

SPECIAL EVENT EXPENSES	1,371,630.
------------------------	------------

RENTAL EXPENSES	169,208.
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REFUNDED GRANTS	-312,233.
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TOTAL TO SCHEDULE D, PART XII, LINE 2D	1,228,605.
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**SCHEDULE F  
(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Statement of Activities Outside the United States**

Complete if the organization answered "Yes" on Form 990, Part IV, line 14b, 15, or 16.

Attach to Form 990.

Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

OMB No. 1545-0047

**2023**

Open to Public  
Inspection

Name of the organization  THE ASPEN INSTITUTE, INC.	Employer identification number  84-0399006
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**Part I General Information on Activities Outside the United States.** Complete if the organization answered "Yes" on Form 990, Part IV, line 14b.

**1 For grantmakers.** Does the organization maintain records to substantiate the amount of its grants and other assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance? .....  **Yes**  **No**

**2 For grantmakers.** Describe in Part V the organization's procedures for monitoring the use of its grants and other assistance outside the United States.

**3 Activities per Region.** (The following Part I, line 3 table can be duplicated if additional space is needed.)

(a) Region	(b) Number of offices in the region	(c) Number of employees, agents, and independent contractors in the region	(d) Activities conducted in the region (by type) (such as, fundraising, program services, investments, grants to recipients located in the region)	(e) If activity listed in (d) is a program service, describe specific type of service(s) in the region	(f) Total expenditures for and investments in the region
CENTRAL AMERICA AND THE CARIBBEAN	0	0	PROGRAM SERVICES AND GRANTS TO RECIPIENTS LOCATED IN REGION.	GRANTS, MEETINGS, AND PROGRAMMATIC ACTIVITIES	1,646,354.
EAST ASIA AND THE PACIFIC	0	0	PROGRAM SERVICES AND GRANTS TO RECIPIENTS LOCATED IN REGION.	GRANTS, MEETINGS, AND PROGRAMMATIC ACTIVITIES	1,045,815.
EUROPE (INCLUDING ICELAND & GREENLAND)	0	0	PROGRAM SERVICES AND GRANTS TO RECIPIENTS LOCATED IN REGION.	GRANTS, MEETINGS, AND PROGRAMMATIC ACTIVITIES	5,042,156.
MIDDLE EAST AND NORTH AFRICA	0	0	PROGRAM SERVICES AND GRANTS TO RECIPIENTS LOCATED IN REGION.	GRANTS, MEETINGS, AND PROGRAMMATIC ACTIVITIES	715,536.
NORTH AMERICA	0	0	PROGRAM SERVICES AND GRANTS TO RECIPIENTS LOCATED IN REGION.	GRANTS, MEETINGS, AND PROGRAMMATIC ACTIVITIES	1,948,787.
RUSSIA AND NEIGHBORING STATES	0	0	AGENTS FOR CONDUCTING MEETINGS AND PROGRAMMATIC ACTIVITIES.	GRANTS, MEETINGS, AND PROGRAMMATIC ACTIVITIES	250,029.
SOUTH AMERICA	0	0	PROGRAM SERVICES AND GRANTS TO RECIPIENTS LOCATED IN REGION.	GRANTS, MEETINGS, AND PROGRAMMATIC ACTIVITIES	1,143,673.
SOUTH ASIA	0	0	PROGRAM SERVICES AND GRANTS TO RECIPIENTS LOCATED IN REGION.	GRANTS, MEETINGS, AND PROGRAMMATIC ACTIVITIES	371,144.
<b>3 a</b> Subtotal .....	0	0			12,163,494.
<b>b</b> Total from continuation sheets to Part I .....	0	0			4,991,986.
<b>c Totals</b> (add lines 3a and 3b) .....	0	0			17,155,480.

For Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule F (Form 990) 2023

**Part I** Continuation of Activities per Region. (Schedule F (Form 990), Part I, line 3)

(a) Region	(b) Number of offices in the region	(c) Number of employees or agents in region	(d) Activities conducted in region (by type) (i.e., fundraising, program services, grants to recipients located in the region)	(e) If activity listed in (d) is a program service, describe specific type of service(s) in region	(f) Total expenditures for region
SUB-SAHARAN AFRICA	0	0	PROGRAM SERVICES AND GRANTS TO RECIPIENTS LOCATED IN REGION.	GRANTS, MEETINGS, AND PROGRAMMATIC ACTIVITIES	4,991,986.
<b>Totals</b> .....					4,991,986.

**Part II** **Grants and Other Assistance to Organizations or Entities Outside the United States.** Complete if the organization answered "Yes" on Form 990, Part IV, line 15, for any recipient who received more than \$5,000. Part II can be duplicated if additional space is needed.

1 (a) Name of organization	(b) IRS code section and EIN (if applicable)	(c) Region	(d) Purpose of grant	(e) Amount of cash grant	(f) Manner of cash disbursement	(g) Amount of noncash assistance	(h) Description of noncash assistance	(i) Method of valuation (book, FMV, appraisal, other)
		SUB-SAHARAN AFRICA	SUPPORT AMP HEALTH WORK	1,062,315.	WIRE TRANSFER	0.		
		SUB-SAHARAN AFRICA	SUPPORT AMP HEALTH WORK	900,000.	WIRE TRANSFER	0.		
		SOUTH AMERICA	SUPPORT GOYN INITIATIVE	506,383.	WIRE TRANSFER	0.		
		SOUTH ASIA	SUPPORT GOYN INITIATIVE	354,105.	WIRE TRANSFER	0.		
		MIDDLE EAST AND NORTH AFRICA	STEVENS INITIATIVE VIRTUAL EXCHANGE PROGRAM	308,741.	WIRE TRANSFER	0.		
		CENTRAL AMERICA AND THE CARIBBEAN	SUPPORT GUATEMALA ECONOMIC DEVELOPMENT INITIATIVE	267,463.	WIRE TRANSFER	0.		
		NORTH AMERICA	SUPPORT CHAPTER OPERATIONS	239,455.	WIRE TRANSFER	0.		
		SOUTH ASIA	SUPPORT GOYN INITIATIVE	224,025.	WIRE TRANSFER	0.		

2 Enter total number of recipient organizations listed above that are recognized as charities by the foreign country, recognized as a tax exempt 501(c)(3) organization by the IRS, or for which the grantee or counsel has provided a section 501(c)(3) equivalency letter ..... 46

3 Enter total number of other organizations or entities ..... 25

<b>Part II</b> Continuation of Grants and Other Assistance to Organizations or Entities Outside the United States. (Schedule F (Form 990), Part II, line 1)								
<b>1</b> <b>(a)</b> Name of organization	<b>(b)</b> IRS code section and EIN (if applicable)	<b>(c)</b> Region	<b>(d)</b> Purpose of grant	<b>(e)</b> Amount of cash grant	<b>(f)</b> Manner of cash disbursement	<b>(g)</b> Amount of non-cash assistance	<b>(h)</b> Description of non-cash assistance	<b>(i)</b> Method of valuation (book, FMV, appraisal, other)
		CENTRAL AMERICA AND THE CARIBBEAN	SUPPORT GEDI PROJECT	186,579.	WIRE TRANSFER	0.		
		SOUTH AMERICA	SUPPORT GOYN INITIATIVE	177,070.	WIRE TRANSFER	0.		
		SUB-SAHARAN AFRICA	SUPPORT CHAPTER OPERATIONS	175,059.	WIRE TRANSFER	0.		
		CENTRAL AMERICA AND THE CARIBBEAN	SUPPORT GEDI PROJECT	152,274.	WIRE TRANSFER	0.		
		EAST ASIA AND THE PACIFIC	SUPPORT CHAPTER OPERATIONS	151,267.	WIRE TRANSFER	0.		
		SUB-SAHARAN AFRICA	SUPPORT GOYN INITIATIVE	145,598.	WIRE TRANSFER	0.		
		EUROPE (INCLUDING ICELAND & GREENLAND)	SMALL AND GROWING BUSINESS EVIDENCE FUND GRANT	143,056.	WIRE TRANSFER	0.		
		CENTRAL AMERICA AND THE CARIBBEAN	SUPPORT GUATEMALA ECONOMIC DEVELOPMENT INITIATIVE	135,600.	WIRE TRANSFER	0.		
		SOUTH ASIA	SUPPORT CHAPTER OPERATIONS	128,848.	WIRE TRANSFER	0.		



<b>Part II</b> Continuation of Grants and Other Assistance to Organizations or Entities Outside the United States. (Schedule F (Form 990), Part II, line 1)								
<b>1</b> <b>(a)</b> Name of organization	<b>(b)</b> IRS code section and EIN (if applicable)	<b>(c)</b> Region	<b>(d)</b> Purpose of grant	<b>(e)</b> Amount of cash grant	<b>(f)</b> Manner of cash disbursement	<b>(g)</b> Amount of non-cash assistance	<b>(h)</b> Description of non-cash assistance	<b>(i)</b> Method of valuation (book, FMV, appraisal, other)
		NORTH AMERICA	SUPPORT CHAPTER OPERATIONS	127,458.	WIRE TRANSFER	0.		
		CENTRAL AMERICA AND THE CARIBBEAN	SUPPORT GUATEMALA ECONOMIC DEVELOPMENT INITIATIVE	125,895.	WIRE TRANSFER	0.		
		MIDDLE EAST AND NORTH AFRICA	STEVENS INITIATIVE VIRTUAL EXCHANGE PROGRAM	121,580.	WIRE TRANSFER	0.		
		CENTRAL AMERICA AND THE CARIBBEAN	GEDI GRANT	119,886.	WIRE TRANSFER	0.		
		NORTH AMERICA	SUPPORT GOYN INITIATIVE	117,303.	WIRE TRANSFER	0.		
		SOUTH AMERICA	SUPPORT CHAPTER OPERATIONS	109,854.	WIRE TRANSFER	0.		
		EAST ASIA AND THE PACIFIC	DIGITAL EQUITY ACCELERATOR AWARD	106,000.	WIRE TRANSFER	0.		
		SUB-SAHARAN AFRICA	DIGITAL EQUITY ACCELERATOR AWARD	105,000.	WIRE TRANSFER	0.		
		EAST ASIA AND THE PACIFIC	DIGITAL EQUITY ACCELERATOR AWARD	104,000.	WIRE TRANSFER	0.		

<b>Part II</b> Continuation of Grants and Other Assistance to Organizations or Entities Outside the United States. (Schedule F (Form 990), Part II, line 1)								
<b>1</b> <b>(a)</b> Name of organization	<b>(b)</b> IRS code section and EIN (if applicable)	<b>(c)</b> Region	<b>(d)</b> Purpose of grant	<b>(e)</b> Amount of cash grant	<b>(f)</b> Manner of cash disbursement	<b>(g)</b> Amount of non-cash assistance	<b>(h)</b> Description of non-cash assistance	<b>(i)</b> Method of valuation (book, FMV, appraisal, other)
		NORTH AMERICA	DIGITAL EQUITY ACCELERATOR AWARD	104,000.	WIRE TRANSFER	0.		
		EAST ASIA AND THE PACIFIC	DIGITAL EQUITY ACCELERATOR AWARD	103,000.	WIRE TRANSFER	0.		
		SUB-SAHARAN AFRICA	DIGITAL EQUITY ACCELERATOR AWARD	102,000.	WIRE TRANSFER	0.		
		SUB-SAHARAN AFRICA	DIGITAL EQUITY ACCELERATOR AWARD	101,000.	WIRE TRANSFER	0.		
		NORTH AMERICA	DIGITAL EQUITY ACCELERATOR AWARD	100,000.	WIRE TRANSFER	0.		
		NORTH AMERICA	DIGITAL EQUITY ACCELERATOR AWARD	100,000.	WIRE TRANSFER	0.		
		NORTH AMERICA	DIGITAL EQUITY ACCELERATOR AWARD	100,000.	WIRE TRANSFER	0.		
		SOUTH AMERICA	ARGIDIUS SCALE PROJECT GRANT	96,968.	WIRE TRANSFER	0.		
		SUB-SAHARAN AFRICA	SUPPORT GOYN INITIATIVE	88,813.	WIRE TRANSFER	0.		

<b>Part II</b> Continuation of Grants and Other Assistance to Organizations or Entities Outside the United States. (Schedule F (Form 990), Part II, line 1)								
<b>1</b> <b>(a)</b> Name of organization	<b>(b)</b> IRS code section and EIN (if applicable)	<b>(c)</b> Region	<b>(d)</b> Purpose of grant	<b>(e)</b> Amount of cash grant	<b>(f)</b> Manner of cash disbursement	<b>(g)</b> Amount of non-cash assistance	<b>(h)</b> Description of non-cash assistance	<b>(i)</b> Method of valuation (book, FMV, appraisal, other)
		MIDDLE EAST AND NORTH AFRICA	STEVENS INITIATIVE VIRTUAL EXCHANGE PROGRAM	85,000.	WIRE TRANSFER	0.		
		CENTRAL AMERICA AND THE CARIBBEAN	SUPPORT GUATEMALA ECONOMIC DEVELOPMENT INITIATIVE	69,451.	WIRE TRANSFER	0.		
		CENTRAL AMERICA AND THE CARIBBEAN	SUPPORT GUATEMALA ECONOMIC DEVELOPMENT INITIATIVE	66,039.	WIRE TRANSFER	0.		
		MIDDLE EAST AND NORTH AFRICA	STEVENS INITIATIVE VIRTUAL EXCHANGE PROGRAM	64,856.	WIRE TRANSFER	0.		
		SOUTH AMERICA	SUPPORT GUATEMALA ECONOMIC DEVELOPMENT INITIATIVE	54,647.	WIRE TRANSFER	0.		
		SUB-SAHARAN AFRICA	AGEI ACTION LAB GRANT	53,195.	WIRE TRANSFER	0.		
		SUB-SAHARAN AFRICA	SUPPORT AFRICA IMPACT FORUM	50,000.	WIRE TRANSFER	0.		
		MIDDLE EAST AND NORTH AFRICA	MCNULTY PRIZE LEAREATE GRANT	35,000.	WIRE TRANSFER	0.		
		SOUTH ASIA	TO PROVIDE ADVOCACY AND COMMUNITY ORGANIZATION AROUND COVID-19 PREVENTION	30,000.	WIRE TRANSFER	0.		

<b>Part II</b> Continuation of Grants and Other Assistance to Organizations or Entities Outside the United States. (Schedule F (Form 990), Part II, line 1)								
<b>1</b> <b>(a)</b> Name of organization	<b>(b)</b> IRS code section and EIN (if applicable)	<b>(c)</b> Region	<b>(d)</b> Purpose of grant	<b>(e)</b> Amount of cash grant	<b>(f)</b> Manner of cash disbursement	<b>(g)</b> Amount of non-cash assistance	<b>(h)</b> Description of non-cash assistance	<b>(i)</b> Method of valuation (book, FMV, appraisal, other)
		SOUTH AMERICA	MCNULTY FOUNDATION GRANT	28,846.	WIRE TRANSFER	0.		
		EAST ASIA AND THE PACIFIC	SUPPORT WOMEN ENTREPRENEURS	25,000.	WIRE TRANSFER	0.		
		SOUTH ASIA	SUPPORT GOYN INITIATIVE	25,000.	WIRE TRANSFER	0.		
		SOUTH ASIA	MCNULTY GLOBAL IMPACT FUND AWARD	25,000.	WIRE TRANSFER	0.		
		SOUTH ASIA	MCNULTY GLOBAL IMPACT FUND AWARD	25,000.	WIRE TRANSFER	0.		
		SUB-SAHARAN AFRICA	MCNULTY GLOBAL IMPACT FUND AWARD	25,000.	WIRE TRANSFER	0.		
		SUB-SAHARAN AFRICA	SUPPORT AFRICA IMPACT FORUM	24,870.	WIRE TRANSFER	0.		
		SUB-SAHARAN AFRICA	SUPPORT AFRICA IMPACT FORUM	24,250.	WIRE TRANSFER	0.		
		SUB-SAHARAN AFRICA	SUPPORT WOMEN-OWNED BUSINESS	22,607.	WIRE TRANSFER	0.		

<b>Part II</b> Continuation of Grants and Other Assistance to Organizations or Entities Outside the United States. (Schedule F (Form 990), Part II, line 1)								
<b>1</b> <b>(a)</b> Name of organization	<b>(b)</b> IRS code section and EIN (if applicable)	<b>(c)</b> Region	<b>(d)</b> Purpose of grant	<b>(e)</b> Amount of cash grant	<b>(f)</b> Manner of cash disbursement	<b>(g)</b> Amount of non-cash assistance	<b>(h)</b> Description of non-cash assistance	<b>(i)</b> Method of valuation (book, FMV, appraisal, other)
		SOUTH ASIA	SUPPORT WOMEN-OWNED MICRO ENTERPRISES	22,250.	WIRE TRANSFER	0.		
		CENTRAL AMERICA AND THE CARIBBEAN	SUPPORT GUATEMALA ECONOMIC DEVELOPMENT INITIATIVE	21,539.	WIRE TRANSFER	0.		
		SOUTH ASIA	COMMUNITY BASED ORGANIZATIONS AND VACCINE DISTRIBUTION	20,462.	WIRE TRANSFER	0.		
		CENTRAL AMERICA AND THE CARIBBEAN	MULTIVERSE GLOBAL INCLUSIVE GROWTH SPARK GRANT AWARD	20,000.	WIRE TRANSFER	0.		
		SOUTH ASIA	MCNULTY PRIZE CATALYST FUND GRANT	20,000.	WIRE TRANSFER	0.		
		NORTH AMERICA	SUPPORT WOMEN ENTREPRENEURS	20,000.	WIRE TRANSFER	0.		
		SUB-SAHARAN AFRICA	SUPPORT SMALL BUSINESS	15,501.	WIRE TRANSFER	0.		
		MIDDLE EAST AND NORTH AFRICA	MCNULTY GLOBAL IMPACT FUND AWARD	15,000.	WIRE TRANSFER	0.		
		CENTRAL AMERICA AND THE CARIBBEAN	SUPPORT GUATEMALA ECONOMIC DEVELOPMENT INITIATIVE	13,058.	WIRE TRANSFER	0.		

<b>Part II</b> Continuation of Grants and Other Assistance to Organizations or Entities Outside the United States. (Schedule F (Form 990), Part II, line 1)								
<b>1</b> <b>(a)</b> Name of organization	<b>(b)</b> IRS code section and EIN (if applicable)	<b>(c)</b> Region	<b>(d)</b> Purpose of grant	<b>(e)</b> Amount of cash grant	<b>(f)</b> Manner of cash disbursement	<b>(g)</b> Amount of non-cash assistance	<b>(h)</b> Description of non-cash assistance	<b>(i)</b> Method of valuation (book, FMV, appraisal, other)
		SUB-SAHARAN AFRICA	DIGITAL EQUITY ACCELERATOR AWARD	10,000.	WIRE TRANSFER	0.		
		SUB-SAHARAN AFRICA	SUPPORT GOYN INITIATIVE	9,410.	WIRE TRANSFER	0.		
		SUB-SAHARAN AFRICA	AFRICA LEADERSHIP INITIATIVE	8,000.	WIRE TRANSFER	0.		
		SUB-SAHARAN AFRICA	SUPPORT GOYN INITIATIVE	8,000.	WIRE TRANSFER	0.		
		EAST ASIA AND THE PACIFIC	DIGITAL EQUITY ACCELERATOR AWARD	8,000.	WIRE TRANSFER	0.		
		EAST ASIA AND THE PACIFIC	DIGITAL EQUITY ACCELERATOR AWARD	8,000.	WIRE TRANSFER	0.		
		SOUTH AMERICA	SUPPORT GEDI PROJECT	7,548.	WIRE TRANSFER	0.		
		SOUTH ASIA	AGEI CAPACITY BUILDING GRANT	6,569.	WIRE TRANSFER	0.		
		MIDDLE EAST AND NORTH AFRICA	STEVENS INITIATIVE VIRTUAL EXCHANGE PROGRAM	5,777.	WIRE TRANSFER	0.		

**Part III Grants and Other Assistance to Individuals Outside the United States.** Complete if the organization answered "Yes" on Form 990, Part IV, line 16.

Part III can be duplicated if additional space is needed.

(a) Type of grant or assistance	(b) Region	(c) Number of recipients	(d) Amount of cash grant	(e) Manner of cash disbursement	(f) Amount of noncash assistance	(g) Description of noncash assistance	(h) Method of valuation (book, FMV, appraisal, other)
HONORARIUM	CENTRAL AMERICA AND THE CARIBBEAN	1	1,000.	WIRE	0.		
AWARDS	CENTRAL AMERICA AND THE CARIBBEAN	1	425.	WIRE	0.		
AWARDS	EUROPE (INCLUDING ICELAND AND GREENLAND)	1	400.	WIRE	0.		
HONORARIUM	MIDDLE EAST AND NORTH AFRICA	5	6,500.	WIRE	0.		
AWARDS	MIDDLE EAST AND NORTH AFRICA	5	3,090.	WIRE	0.		
HONORARIUM	NORTH AMERICA (WHICH INCLUDES CANADA AND MEXICO, BUT NOT	2	4,700.	WIRE	0.		
STIPEND	SUB-SAHARAN AFRICA	5	2,500.	WIRE	0.		

**Part IV Foreign Forms**

- 1 Was the organization a U.S. transferor of property to a foreign corporation during the tax year? *If "Yes," the organization may be required to file Form 926, Return by a U.S. Transferor of Property to a Foreign Corporation (see the Instructions for Form 926)* .....  Yes  No
  
- 2 Did the organization have an interest in a foreign trust during the tax year? *If "Yes," the organization may be required to separately file Form 3520, Annual Return To Report Transactions With Foreign Trusts and Receipt of Certain Foreign Gifts, and/or Form 3520-A, Annual Information Return of Foreign Trust With a U.S. Owner (see the Instructions for Forms 3520 and 3520-A; don't file with Form 990)* .....  Yes  No
  
- 3 Did the organization have an ownership interest in a foreign corporation during the tax year? *If "Yes," the organization may be required to file Form 5471, Information Return of U.S. Persons With Respect to Certain Foreign Corporations (see the Instructions for Form 5471)* .....  Yes  No
  
- 4 Was the organization a direct or indirect shareholder of a passive foreign investment company or a qualified electing fund during the tax year? *If "Yes," the organization may be required to file Form 8621, Information Return by a Shareholder of a Passive Foreign Investment Company or Qualified Electing Fund (see the Instructions for Form 8621)* .....  Yes  No
  
- 5 Did the organization have an ownership interest in a foreign partnership during the tax year? *If "Yes," the organization may be required to file Form 8865, Return of U.S. Persons With Respect to Certain Foreign Partnerships (see the Instructions for Form 8865)* .....  Yes  No
  
- 6 Did the organization have any operations in or related to any boycotting countries during the tax year? *If "Yes," the organization may be required to separately file Form 5713, International Boycott Report (see the Instructions for Form 5713; don't file with Form 990)* .....  Yes  No



**Part V Supplemental Information**

Provide the information required by Part I, line 2 (monitoring of funds); Part I, line 3, column (f) (accounting method; amounts of investments vs. expenditures per region); Part II, line 1 (accounting method); Part III (accounting method); and Part III, column (c) (estimated number of recipients), as applicable. Also complete this part to provide any additional information. See instructions.

PART I, LINE 2:

THE INSTITUTE PERIODICALLY ENGAGES OTHER ENTITIES TO FURTHER THE OBJECTIVES SET FORTH IN OUR GRANT AGREEMENTS. THIS IS TYPICALLY DONE VIA SUB-AWARDS OR RE-GRANTS THAT RUN CONCURRENTLY WITH THE PRIME AWARD IN WHICH THE SUB RECIPIENTS ARE ADVISED OF ALL APPLICABLE LAWS AND REGULATIONS, AND ALL APPROPRIATE FLOW-DOWN PROVISIONS FROM THE PRIME AGREEMENT. ALL SUB GRANTEEES OR SERVICE PROVIDERS MUST ALSO CERTIFY THAT THEY DO NOT AND WILL NOT KNOWINGLY PROVIDE MATERIAL SUPPORT OR RESOURCES TO ANY INDIVIDUAL OR ENTITY INVOLVED WITH TERRORISM (INCLUDING ANY INDIVIDUALS, ENTITIES, OR GROUPS SUBJECT TO OFAC SANCTIONS) OR TO ANYONE WHO ACTS AS AN AGENT FOR SUCH AN INDIVIDUAL OR ENTITY. ANY VIOLATION OF THIS CERTIFICATION MUST BE GROUNDS FOR IMMEDIATE TERMINATION OF THE LETTER OF AGREEMENT AND RETURN OF ALL GRANT FUNDS.

THE FREQUENCY AND SCOPE OF THE RESEARCH PROGRAM'S MONITORING PROCEDURES ARE DETERMINED JOINTLY BY THE RESPONSIBLE PROGRAM MANAGER AND RESPECTIVE GRANT ADMINISTRATOR/FINANCIAL ANALYST. THIS INCLUDES THE ROUTINE RECEIPT AND REVIEW OF THE NARRATIVE AND FINANCIAL REPORTS, A REVIEW OF EXPENSES TO BUDGET, THE OPTION TO PERFORM AUDITS, AND ALLOWS FOR THE PERFORMANCE OF SITE VISITS IF NECESSARY. THE INSTITUTE IS NOTIFIED WHENEVER PROBLEMS, DELAYS OR OTHER CONDITIONS DEVELOP WHICH WOULD HAVE SIGNIFICANT IMPACT UPON THE PROJECT. BUDGET REVISIONS ARE ALLOWED WITHIN THE PARAMETERS SET FORTH IN EACH SUB AWARD. THE PAYMENT SCHEDULE AND THE DEGREE OF FLEXIBILITY OFFERED MAY DEPEND ON PREVIOUS EXPERIENCE WITH THE RECIPIENT, THE DEGREE OF EXTERNAL OVERSIGHT BY OTHER PARTIES, AND THE SOPHISTICATION OF THE RECIPIENT'S ADMINISTRATIVE SYSTEMS.

**Part V Supplemental Information**

Provide the information required by Part I, line 2 (monitoring of funds); Part I, line 3, column (f) (accounting method; amounts of investments vs. expenditures per region); Part II, line 1 (accounting method); Part III (accounting method); and Part III, column (c) (estimated number of recipients), as applicable. Also complete this part to provide any additional information. See instructions.

PARTICIPANTS ARE EXPECTED TO COMPLY WITH ALL RELEVANT U.S. LAWS. PRIOR TO

ISSUING AWARDS TO FOREIGN ENTITIES, THE PROGRAMS ARE BEING ASKED TO

COMPLETE A DUE DILIGENCE CHECKLIST, WHICH INCLUDES ADDITIONAL INFORMATION

ABOUT THE SUB RECIPIENT INCLUDING: ANY REASONABLY AVAILABLE HISTORICAL

INFORMATION ABOUT THE GRANTEE THAT ASSURES THE INSTITUTE OF THE GRANTEE'S

IDENTITY AND INTEGRITY SUCH AS THE JURISDICTION IN WHICH A GRANTEE

ORGANIZATION IS INCORPORATED OR FORMED; COPIES OF INCORPORATING OR OTHER

GOVERNING INSTRUMENTS; INFORMATION ON THE INDIVIDUALS WHO FORMED AND

OPERATE THE ORGANIZATION; AND INFORMATION RELATING TO THE GRANTEE'S

OPERATING HISTORY; THE GRANTEE OR SERVICE PROVIDER'S NAME IN ENGLISH, AND

THE LANGUAGE OF ORIGIN, AND ANY ACRONYM OR OTHER NAMES USED TO IDENTIFY

THE GRANTEE; THE JURISDICTIONS IN WHICH A GRANTEE OR SERVICE PROVIDER

MAINTAINS A PHYSICAL PRESENCE; THE GRANTEE OR SERVICE PROVIDER'S POSTAL,

EMAIL AND WEBSITE ADDRESSES AND PHONE NUMBERS FOR EACH PLACE OF BUSINESS.

THE INSTITUTE ALSO CONDUCTS A REASONABLE SEARCH OF PUBLICLY AVAILABLE

INFORMATION TO DETERMINE WHETHER THE GRANTEE OR SERVICE PROVIDER IS

SUSPECTED OF ACTIVITY RELATING TO TERRORISM, INCLUDING TERRORIST

FINANCING OR OTHER SUPPORT.

PART I, LINE 3:

THE CASH METHOD OF ACCOUNTING WAS USED TO ACCOUNT FOR FOREIGN

EXPENDITURES.

PART II, COLUMN (D):

REGION: SOUTH ASIA

(D) PURPOSE OF GRANT: TO PROVIDE ADVOCACY AND COMMUNITY ORGANIZATION

AROUND COVID-19 PREVENTION AND VACCINES AWARENESS

**Part V Supplemental Information**

Provide the information required by Part I, line 2 (monitoring of funds); Part I, line 3, column (f) (accounting method; amounts of investments vs. expenditures per region); Part II, line 1 (accounting method); Part III (accounting method); and Part III, column (c) (estimated number of recipients), as applicable. Also complete this part to provide any additional information. See instructions.

PART III, COL (C):

THIS COLUMN REPRESENTS THE ACTUAL NUMBER OF GRANT RECIPIENTS.



**Part II Fundraising Events.** Complete if the organization answered "Yes" on Form 990, Part IV, line 18, or reported more than \$15,000 of fundraising event contributions and gross income on Form 990-EZ, lines 1 and 6b. List events with gross receipts greater than \$5,000.

		(a) Event #1	(b) Event #2	(c) Other events	(d) Total events (add col. (a) through col. (c))	
		ANNUAL AWARDS DINNER (event type)	SUMMER CELEBRATION (event type)	2 (total number)		
Revenue	1	Gross receipts	866,535.	406,880.	735,816.	2,009,231.
	2	Less: Contributions	786,635.	372,080.	684,353.	1,843,068.
	3	Gross income (line 1 minus line 2)	79,900.	34,800.	51,463.	166,163.
Direct Expenses	4	Cash prizes				
	5	Noncash prizes			33,304.	33,304.
	6	Rent/facility costs	90,473.	15,769.	47,083.	153,325.
	7	Food and beverages	114,644.	41,776.	48,123.	204,543.
	8	Entertainment	80,348.	5,688.	46,154.	132,190.
	9	Other direct expenses	581,070.	162,386.	104,812.	848,268.
	10	Direct expense summary. Add lines 4 through 9 in column (d)				1,371,630.
11	Net income summary. Subtract line 10 from line 3, column (d)				-1,205,467.	

**Part III Gaming.** Complete if the organization answered "Yes" on Form 990, Part IV, line 19, or reported more than \$15,000 on Form 990-EZ, line 6a.

		(a) Bingo	(b) Pull tabs/instant bingo/progressive bingo	(c) Other gaming	(d) Total gaming (add col. (a) through col. (c))	
Revenue	1	Gross revenue				
	2	Cash prizes				
Direct Expenses	3	Noncash prizes				
	4	Rent/facility costs				
	5	Other direct expenses				
	6	Volunteer labor	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> No	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> No	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> No	
	7	Direct expense summary. Add lines 2 through 5 in column (d)				
	8	Net gaming income summary. Subtract line 7 from line 1, column (d)				

9 Enter the state(s) in which the organization conducts gaming activities: \_\_\_\_\_

a Is the organization licensed to conduct gaming activities in each of these states?  Yes  No

b If "No," explain: \_\_\_\_\_

10a Were any of the organization's gaming licenses revoked, suspended, or terminated during the tax year?  Yes  No

b If "Yes," explain: \_\_\_\_\_





**SCHEDULE I  
(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Grants and Other Assistance to Organizations,  
Governments, and Individuals in the United States**  
Complete if the organization answered "Yes" on Form 990, Part IV, line 21 or 22.  
**Attach to Form 990.**  
Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.

OMB No. 1545-0047

**2023**

**Open to Public  
Inspection**

Name of the organization **THE ASPEN INSTITUTE, INC.** Employer identification number **84-0399006**

**Part I General Information on Grants and Assistance**

- 1** Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance?  **Yes**  **No**
- 2** Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States.

**Part II Grants and Other Assistance to Domestic Organizations and Domestic Governments.** Complete if the organization answered "Yes" on Form 990, Part IV, line 21, for any recipient that received more than \$5,000. Part II can be duplicated if additional space is needed.

<b>1 (a)</b> Name and address of organization or government	<b>(b)</b> EIN	<b>(c)</b> IRC section (if applicable)	<b>(d)</b> Amount of cash grant	<b>(e)</b> Amount of noncash assistance	<b>(f)</b> Method of valuation (book, FMV, appraisal, other)	<b>(g)</b> Description of noncash assistance	<b>(h)</b> Purpose of grant or assistance
ZERO EMISSION MARITIME BUYERS ALLIANCE - 1015 15TH STREET, NW, SUITE 1000 - WASHINGTON, DC 20005	92-2453446	501(C)(3)	1,553,181.	0.			SUPPORT OPERATING ACTIVITIES
ITHAKA HARBORS INC 165 BROADWAY NEW YORK, NY 10006	13-3857105	501(C)(3)	1,134,374.	0.			AMERICAN TALENT INITIATIVE (ATI) GRANT
INTERNATIONAL RESEARCH & EXCHANGES BOARD INC - 1275 K STREET NW, SUITE 600 - WASHINGTON, DC 20005	22-3087809	501(C)(3)	1,020,705.	0.			STEVENS INITIATIVE VIRTUAL EXCHANGE PROGRAM
SOLIYA INC 261 MADISON AVENUE, 9TH FLOOR NEW YORK, NY 10016	32-0060209	501(C)(3)	951,334.	0.			STEVENS INITIATIVE VIRTUAL EXCHANGE PROGRAM
GLOBAL DEVELOPMENT INCUBATOR INC 1634 I STREET NW, SUITE 300 WASHINGTON, DC 20006	14-1945286	501(C)(3)	935,000.	0.			GLOBAL OPPORTUNITY YOUTH NETWORK (GOYN) GRANT
AFS INTERCULTURAL PROGRAMS, INC. 5 HANOVER SQUARE, SUITE 1402 NEW YORK, NY 10004	13-5596742	501(C)(3)	763,623.	0.			STEVENS INITIATIVE VIRTUAL EXCHANGE PROGRAM

**2** Enter total number of section 501(c)(3) and government organizations listed in the line 1 table ..... **148.**

**3** Enter total number of other organizations listed in the line 1 table ..... **13.**

**For Paperwork Reduction Act Notice, see the Instructions for Form 990.**

**Schedule I (Form 990) 2023**

SEE PART IV FOR COLUMN (H) DESCRIPTIONS



**Part II** Continuation of Grants and Other Assistance to Domestic Organizations and Domestic Governments (Schedule I (Form 990), Part II.)

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of noncash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
POMONA IMPACT FOUNDATION 2678 NW 23RD WAY BOCA RATON, FL 33431	81-2867074	501(C)(3)	679,004.	0.			GUATEMALA ENTREPRENEURSHIP DEVELOPMENT INITIATIVE GRANT
IEARN INC 475 RIVERSIDE DRIVE, SUITE 450 NEW YORK, NY 10115	13-3782233	501(C)(3)	637,454.	0.			STEVENS INITIATIVE VIRTUAL EXCHANGE PROGRAM
EQUAL MEASURE 520 WALNUT STREET, SUITE 1450 PHILADELPHIA, PA 19106	23-2694572	501(C)(3)	535,000.	0.			OPPORTUNITY YOUTH FORUM (OYF) ANNUAL ASSESSMENT STIPEND
CRITERION INSTITUTE 81 CHURCH HILL ROAD HADDAM, CT 06438	27-3458737	501(C)(3)	505,999.	0.			GENDER LENS INVESTING
AMARILLO COLLEGE FOUNDATION PO BOX 447 AMARILLO, TX 79178	75-6029084	501(C)(3)	500,000.	0.			2023 ASPEN PRIZE WINNER
IMPERIAL COMMUNITY COLLEGE DISTRICT - 380 E. ATEN ROAD - IMPERIAL, CA 92251	95-6006350	501(C)(3)	500,000.	0.			2023 ASPEN PRIZE WINNER
INSTITUTE OF INTERNATIONAL EDUCATION - ONE WORLD TRADE CENTER, 36TH FLOOR - NEW YORK, NY 10007	13-1624046	501(C)(3)	485,339.	0.			STEVENS INITIATIVE VIRTUAL EXCHANGE PROGRAM
TEACHERS COLLEGE COLUMBIA UNIVERSITY - 525 W 120TH STREET, BOX 30 - NEW YORK, NY 10027	13-1624202	501(C)(3)	445,750.	0.			ADVANCING RACIAL EQUITY IN BACHELOR'S ATTAINMENT THROUGH TRANSFER PROJECT GRANT
CLEARPATH, INC. 518 C STREET NE, SUITE 300 WASHINGTON, DC 20002	82-5026325	501(C)(3)	380,000.	0.			CLEARPATH AWARD

Schedule I (Form 990)

**Part II** Continuation of Grants and Other Assistance to Domestic Organizations and Domestic Governments (Schedule I (Form 990), Part II.)

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of noncash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
IMPACTASSETS INC 4340 EAST WAY HIGHWAY BETHESDA, MD 20814	26-2048480	501(C)(3)	359,586.	0.			GENDER SMART INVESTING
MAPWORKS LEARNING 6821 KINCAID AVENUE FALLS CHURCH, VA 22042	46-5120723	501(C)(3)	353,383.	0.			STEVENS INITIATIVE VIRTUAL EXCHANGE PROGRAM
WORLD LEARNING INC 1 KIPLING ROAD, PO BOX 676 BRATTLEBORO, VT 05302	03-0179592	501(C)(3)	346,790.	0.			STEVENS INITIATIVE VIRTUAL EXCHANGE PROGRAM
JOBS FOR THE FUTURE INC 50 MILK STREET, 17TH FLOOR BOSTON, MA 02109	06-1164568	501(C)(3)	333,500.	0.			TECHNICAL ASSISTANCE AWARD
CHILDREN & NATURE NETWORK 1611 COUNTY ROAD B WEST, SUITE 320 ROSEVILLE, MN 55113	14-1959018	501(C)(3)	303,251.	0.			GLOBAL OPPORTUNITY YOUTH NETWORK (GOYN) GRANT, STEVENS INITIATIVE VIRTUAL EXCHANGE PROGRAM
PARTNERS IN HEALTH 800 BOYLSTON STREET, SUITE 300 BOSTON, MA 02199	04-3567502	501(C)(3)	290,000.	0.			MOVE UP GLOBAL GRANT
RESEARCH FOUNDATION OF THE CITY UNIVERSITY OF NEW YORK - 230 WEST 41ST STREET, 7TH FLOOR - NEW YORK, NY 10036	13-1988190	501(C)(3)	287,862.	0.			STEVENS INITIATIVE VIRTUAL EXCHANGE PROGRAM
NEW YORK ACADEMY OF SCIENCES 1617 THIRD AVENUE, PO BOX 287146 NEW YORK, NY 10128	13-1773640	501(C)(3)	243,156.	0.			STEVENS INITIATIVE VIRTUAL EXCHANGE PROGRAM
REGENTS OF THE UNIVERSITY OF CALIFORNIA - 1111 FRANKLIN SREET, 10TH FLOOR - OAKLAND, CA 94607	94-3067788	501(C)(3)	230,000.	0.			ATI ACCELERATING TRANSFER GRANT

Schedule I (Form 990)

**Part II** Continuation of Grants and Other Assistance to Domestic Organizations and Domestic Governments (Schedule I (Form 990), Part II.)

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of noncash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
COREWELL HEALTH 100 MICHIGAN STREET NE, MC 004 GRAND RAPIDS, MI 49503	38-3382353	501(C)(3)	225,000.	0.			CRIMINAL JUSTICE REFORM INITIATIVE (CJRI) AWARD
GLOBAL NOMADS GROUP INC 132 NASSAU STREET, SUITE 822 NEW YORK, NY 10038	75-2750127	501(C)(3)	219,329.	0.			STEVENS INITIATIVE VIRTUAL EXCHANGE PROGRAM
BOARD OF TRUSTEES OF THE LELAND STANFORD JUNIOR UNIVERSITY - 3145 PORTER DRIVE - PALO ALTO, CA 94304	94-1156365	501(C)(3)	203,677.	0.			RELIGIOUS PLURALISM FUNDERS CIRCLE (RPFC) HONORARIUM
BOSTON PRIVATE INDUSTRY COUNCIL, INC. - 2 OLIVER STREET, 3RD FLOOR - BOSTON, MA 02109	04-2676661	501(C)(3)	200,000.	0.			DATA FOR IMPACT (D4I) GRANT
COMMUNITY CENTER FOR EDUCATION RESULTS - 707 S. GRADY WAY, SUITE 600 - RENTON, WA 98057	27-1667560	501(C)(3)	200,000.	0.			DATA FOR IMPACT (D4I) GRANT
GEORGE MASON UNIVERSITY FOUNDATION INC - 4400 UNIVERSITY DRIVE, MSN 1A3 - FAIRFAX, VA 22030	54-1603842	501(C)(3)	200,000.	0.			COLLEGE EXCELLENCE PROGRAM (CEP) AWARD
PHILADELPHIA YOUTH NETWORK INC 400 MARKET STREET, SUITE 200 PHILADELPHIA, PA 19106	23-2993155	501(C)(3)	200,000.	0.			DATA FOR IMPACT (D4I) GRANT
US CHAMBER OF COMMERCE FOUNDATION 1615 H STREET NW WASHINGTON, DC 20062	46-1561597	501(C)(3)	198,375.	0.			STRENGTHENING EMPLOYER JOB QUALITY: TPM EXTENSION MODULE
BLACK BUSINESS COMMUNITY DEVELOPMENT CORPORATION - 301 EAST PINE STREET, SUITE 174-A - ORLANDO, FL 32801	59-3179911	501(C)(3)	190,000.	0.			SUPPORT COMMUNITY DEVELOPMENT FINANCIAL INSTITUTIONS

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INSTITUTE CAPITAL INC 114 W PARRISH STREET DURHAM, NC 27702	56-2142717	501(C)(3)	190,000.	0.			SUPPORT COMMUNITY DEVELOPMENT FINANCIAL INSTITUTIONS
NORTHERN GREAT LAKES INITIATIVES 1401 PRESQUE ISLE AVENUE, JACOBETTI SUITE 2 - MARQUETTE, MI 49855	47-3130767	501(C)(3)	190,000.	0.			SUPPORT COMMUNITY DEVELOPMENT FINANCIAL INSTITUTIONS
FLORIDA INTERNATIONAL UNIVERSITY BOARD OF TRUSTEES - 11200 SW 8TH STREET CSC314 - MIAMI, FL 33199	65-0177616	501(C)(3)	188,649.	0.			STEVENS INITIATIVE VIRTUAL EXCHANGE PROGRAM
LONE STAR JUSTICE ALLIANCE 3809 SOUTH 1ST AUSTIN, TX 78704	82-2345921	501(C)(3)	184,000.	0.			INNOVATION FUND PLANNING PHASE AWARD, AUSTIN OPPORTUNITY YOUTH COLLABORATIVE (AOYC)
AMERICA-MIDEAST EDUCATIONAL & TRAINING SERVICES INC - 2025 M STREET NW, SUITE 600 - WASHINGTON, DC 20036	53-0243270	501(C)(3)	173,676.	0.			STEVENS INITIATIVE VIRTUAL EXCHANGE PROGRAM
EDUCATION FOR SHARING INC PO BOX 12981 LA JOLLA, CA 92037	80-0934649	501(C)(3)	170,537.	0.			STEVENS INITIATIVE VIRTUAL EXCHANGE PROGRAM
MERCY CORPS 45 SW ANKENY STREET PORTLAND, OR 97204	91-1148123	501(C)(3)	170,172.	0.			GUATEMALA ENTREPRENEURSHIP DEVELOPMENT INITIATIVE GRANT
BRIYA PUBLIC CHARTER SCHOOL 2333 ONTARIO ROAD NW WASHINGTON, DC 20009	20-4497716	501(C)(3)	170,000.	0.			2GEN BEST PRACTICES ACCELERATOR FUND GRANT
FAMILYAID BOSTON, INC. 3815 WASHINGTON STREET, SUITE #3 BOSTON, MA 12130	04-2105756	501(C)(3)	170,000.	0.			2GEN BEST PRACTICES ACCELERATOR FUND GRANT

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GARRETT COUNTY MD COMMUNITY ACTION COMMITTEE, INC - 104 EAST CENTER STREET - OAKLAND, MD 21550	52-0820662	501(C)(3)	170,000.	0.			2GEN BEST PRACTICES ACCELERATOR FUND GRANT
ICAFUND 1714 FRANKLIN STREET, SUITE 100-174 OAKLAND, CA 94612	47-0898054	501(C)(3)	170,000.	0.			SUPPORT COMMUNITY DEVELOPMENT FINANCIAL INSTITUTIONS
JEREMIAH PROGRAM 615 1ST AVENUE NE, SUITE 210 MINNEAPOLIS, MN 55413	41-1801834	501(C)(3)	170,000.	0.			2GEN BEST PRACTICES ACCELERATOR FUND GRANT
KANSAS ASSOCIATION OF CHILD CARE RESOURCE AND REFERRAL AGENCIES - 1508 EAST IRON AVENUE - SALINA, KS 67401	48-1102008	501(C)(3)	170,000.	0.			2GEN BEST PRACTICES ACCELERATOR FUND GRANT
SPRINGBOARD TO OPPORTUNITIES 3000 OLD CANTON ROAD, SUITE 470 JACKSON, MS 39216	46-1917760	501(C)(3)	170,000.	0.			2GEN BEST PRACTICES ACCELERATOR FUND GRANT
UNITED WAY OF SAN ANTONIO AND BEXAR COUNTY - 700 S ALAMO STREET - SAN ANTONIO, TX 78205	74-1272381	501(C)(3)	170,000.	0.			2GEN BEST PRACTICES ACCELERATOR FUND GRANT
UTEC INC 17 WARREN STREET LOWELL, MA 01852	38-3669532	501(C)(3)	170,000.	0.			2GEN BEST PRACTICES ACCELERATOR FUND GRANT
VALLEY SETTLEMENT 1901 GRAND AVENUE, SUITE 206 GLENWOOD SPRINGS, CO 81601	81-2401368	501(C)(3)	170,000.	0.			2GEN BEST PRACTICES ACCELERATOR FUND GRANT
MEDSTAR HEALTH RESEARCH INSTITUTE 8094 SANDPIPER CIRCLE NOTTINGHAM, MD 21236	52-6056274	501(C)(3)	169,625.	0.			2GEN BEST PRACTICES ACCELERATOR FUND GRANT

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COLORADO ENTERPRISE FUND 1888 SHERMAN STREET, SUITE 530 DENVER, CO 80203	84-0837398	501(C)(3)	167,500.	0.			SUPPORT COMMUNITY DEVELOPMENT FINANCIAL INSTITUTIONS
NATIONWIDE CHILDREN'S HOSPITAL FOUNDATION - 700 CHILDRENS DRIVE - COLUMBUS, OH 43205	31-1036370	501(C)(3)	166,439.	0.			2GEN BEST PRACTICES ACCELERATOR FUND GRANT
CLIMB 1709 CAREY AVENUE CHEYENNE, WY 82001	20-1523033	501(C)(3)	165,000.	0.			2GEN BEST PRACTICES ACCELERATOR FUND GRANT
COASTAL ENTERPRISES INC 30 FEDERAL STREET, SUITE 100 BRUNSWICK, ME 04011	01-0347504	501(C)(3)	164,800.	0.			SUPPORT COMMUNITY DEVELOPMENT FINANCIAL INSTITUTIONS
JUSTINE PETERSEN HOUSING AND REINVESTMENT CORPORATION - 1023 N GRAND BOULEVARD - SAINT LOUIS, MO 63106	43-1769074	501(C)(3)	160,000.	0.			SUPPORT COMMUNITY DEVELOPMENT FINANCIAL INSTITUTIONS
NEW MOMS, INC. 5317 W CHICAGO AVENUE CHICAGO, IL 60651	36-3265804	501(C)(3)	154,330.	0.			2GEN BEST PRACTICES ACCELERATOR FUND GRANT
COLORADO YOUTH FOR A CHANGE 1390 LAWRENCE STREET, SUITE 200 DENVER, CO 80204	20-2501002	501(C)(3)	150,000.	0.			BELONGING, MEANING, WELLBEING, AND PURPOSE (BMWFP) AWARD
LIFT, INC 999 NORTH CAPITOL STREET NE, SUITE WASHINGTON, DC 20002	52-2168409	501(C)(3)	150,000.	0.			2GEN BEST PRACTICES ACCELERATOR FUND GRANT
LOS ALAMOS NATIONAL LABORATORY FOUNDATION - 1112 PLAZA DEL NORTE - ESPANOLA, NM 87532	74-2853972	501(C)(3)	150,000.	0.			OPPORTUNITY YOUTH FORUM (OYF) AND IMPA - IMPACT FUND GRANTS

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PARTNERS IN DEVELOPMENT FOUNDATION 2040 BACHELOT STREET HONOLULU, HI 96817	94-3271325	501(C)(3)	150,000.	0.			BELONGING, MEANING, WELLBEING, AND PURPOSE (BMWFP) AWARD
PRO MUJER INC 1515 MADISON AVENUE, 8TH FLOOR NEW YORK, NY 10022	98-0115409	501(C)(3)	150,000.	0.			SUPPORT OF THE GUATEMALA ENTREPRENEURSHIP DEVELOPMENT INITIATIVE (GEDI)
GLOBAL TIES US 1250 H STREET NW, SUITE 305 WASHINGTON, DC 20005	52-0848094	501(C)(3)	146,438.	0.			STEVENS INITIATIVE VIRTUAL EXCHANGE PROGRAM
MICRO ENTERPRISE SERVICES OF OREGON - 4008 NE MLK JR BOULEVARD - PORTLAND, OR 97212	20-4379510	501(C)(3)	145,000.	0.			SUPPORT COMMUNITY DEVELOPMENT FINANCIAL INSTITUTIONS
FUND FOR PUBLIC SCHOOLS, INC. 52 CHAMBERS STREET, ROOM 305 NEW YORK, NY 10007	11-2656137	501(C)(3)	142,978.	0.			AC BROOKLYN GRANT
GAMES FOR CHANGE INC PO BOX 770699 WOODSIDE, NY 11377	26-2623362	501(C)(3)	130,217.	0.			STEVENS INITIATIVE VIRTUAL EXCHANGE PROGRAM
CALIFORNIA FARMLINK 335 SPRECKELS DRIVE, SUITE F APTOS, CA 95003	94-3332630	501(C)(3)	130,000.	0.			SUPPORT COMMUNITY DEVELOPMENT FINANCIAL INSTITUTIONS
KIND FOUNDATION INC PO BOX 705, MIDTOWN STATION NEW YORK, NY 10018	81-0856748	501(C)(3)	128,214.	0.			STEVENS INITIATIVE VIRTUAL EXCHANGE PROGRAM
PLUGGED IN BAND PROGRAM INC 40 FREEMAN PLACE NEEDHAM, MA 02492	65-1195693	501(C)(3)	122,441.	0.			STEVENS INITIATIVE VIRTUAL EXCHANGE PROGRAM

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CULTURINGUA 8920 JOHN BARRETT DRIVE SAN ANTONIO, TX 78240	84-1940407	501(C)(3)	121,361.	0.			STEVENS INITIATIVE VIRTUAL EXCHANGE PROGRAM
NEW SCHOOLS FOR NEW ORLEANS INC 1555 POYDRAS STREET, SUITE 781 NEW ORLEANS, LA 70112	02-0773717	501(C)(3)	113,935.	0.			ASPEN CHALLENGE 2023 GRANT
TEXAS NETWORK OF YOUTH SERVICES INC - PO BOX 26855 - AUSTIN, TX 78755	75-1791374	501(C)(3)	104,318.	0.			TEXAS EMERGING LEADERS BOARD (TELB) GRANT
AFRICAN DEVELOPMENT CENTER 1931 5TH STREET SOUTH MINNEAPOLIS, MN 55454	20-0553370	501(C)(3)	100,000.	0.			SUPPORT COMMUNITY DEVELOPMENT FINANCIAL INSTITUTIONS
NARRATIVE NATION, INC. 48 LONGSHORE STREET BAY SHORE, NY 11706	82-3760872	501(C)(3)	95,000.	0.			IMPA - 2022 FELLOWS IMPACT FUND GRANT
NATIONAL LEAGUE OF CITIES INSTITUTE INC - 660 N CAPITOL STREET NW, SUITE 450 - WASHINGTON, DC 20001	52-6055762	501(C)(3)	91,000.	0.			IMPA - 2022 FELLOWS IMPACT FUND GRANT
SOCIAL VENTURE PARTNERS TUCSON 5049 EAST BROADWAY BOULEVARD, SUITE TUCSON, AZ 85711	82-2964855	501(C)(3)	90,000.	0.			IMPA - 2022 FELLOWS IMPACT FUND GRANT
AMERICAN YOUTH WORKS 1901 E BEN WHITE BOULEVARD AUSTIN, TX 78741	74-2197942	501(C)(3)	85,000.	0.			INNOVATION FUND PLANNING PHASE AWARD, OPPORTUNITY YOUTH FORUM (OYF) HONORARIUM
CATHOLIC UNIVERSITY OF AMERICA 620 MICHIGAN AVENUE NE, LEAHY HALL WASHINGTON, DC 20064	53-0196583	501(C)(3)	84,671.	0.			POLITICS OF VULNERABILITY PROJECT

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ALLIANCE OF COMMUNITY ASSISTANCE MINISTRIES INC - 710 N POST OAK ROAD, SUITE 210 - HOUSTON, TX 77024	27-5410988	501(C)(3)	84,000.	0.			INNOVATION FUND PLANNING PHASE AWARD
BIG BROTHERS BIG SISTERS OF EL PASO INC - 1724 WYOMING AVENUE - EL PASO, TX 79902	74-1970973	501(C)(3)	84,000.	0.			INNOVATION FUND AND TEXAS OPPORTUNITY YOUTH FORUM (TOYF) PLANNING PHASE AWARDS
CITIZENS FOR EDUCATIONAL EXCELLENCE INC - PO BOX 261125 - CORPUS CHRISTI, TX 78426	75-3137924	501(C)(3)	84,000.	0.			INNOVATION FUND PLANNING PHASE AWARD
RESTORE EDUCATION INC PO BOX 692338 SAN ANTONIO, TX 78269	26-2966263	501(C)(3)	84,000.	0.			INNOVATION FUND PLANNING PHASE AWARD
TEXAS INTERNATIONAL EDUCATION CONSORTIUM - 1103 W 24TH STREET - AUSTIN, TX 78705	74-2383582	501(C)(3)	81,734.	0.			STEVENS INITIATIVE VIRTUAL EXCHANGE PROGRAM
WILLIAM DAVIDSON INSTITUTE AT THE UNIVERSITY OF MICHIGAN - 724 E UNIVERSITY AVENUE, WYLY HALL, FLOOR 1 - ANN ARBOR, MI 48109	38-3048086	501(C)(3)	81,470.	0.			STEVENS INITIATIVE VIRTUAL EXCHANGE PROGRAM
MILLENNIAL ACTION PROJECT 1701 RHODE ISLAND AVENUE NW WASHINGTON, DC 20036	47-2802851	501(C)(3)	79,500.	0.			IMPA - 2022 FELLOWS IMPACT FUND GRANT
EL PASO INDEPENDENT SCHOOL DISTRICT - PO BOX 20500 - EL PASO, TX 79998	74-6000769	GOV'T	75,000.	0.			POSTSECONDARY LEADERSHIP ACTIVATION FUND GRANT
HUMAN RESOURCE DEVELOPMENT COUNCIL OF DISTRICT IX INC - 32 S TRACY AVENUE - BOZEMAN, MT 59715	81-0350886	501(C)(3)	75,000.	0.			BELONGING, MEANING, WELLBEING, AND PURPOSE (BMWP) AWARD

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LONG BEACH CITY COLLEGE 4901 EAST CARSON STREET, Y-14 LONG BEACH, CA 90808	95-2654140	501(C)(3)	75,000.	0.			POSTSECONDARY LEADERSHIP ACTIVATION FUND GRANT
LOS ANGELES COMMUNITY COLLEGE DISTRICT - 770 WILSHIRE BOULEVARD - LOS ANGELES, CA 90017	42-1252620	501(C)(3)	75,000.	0.			POSTSECONDARY LEADERSHIP ACTIVATION FUND GRANT
MONTGOMERY COLLEGE FOUNDATION INC 9221 CORPORATE BOULEVARD ROCKVILLE, MD 20850	52-1267008	501(C)(3)	75,000.	0.			POSTSECONDARY LEADERSHIP ACTIVATION FUND GRANT
MYPATH 2430 MISSION STREET SAN FRANCISCO, CA 94110	94-3098928	501(C)(3)	75,000.	0.			OPPORTUNITY YOUTH FORUM (OYF) GRANT
SOURCE GLOBAL, PBC 1465 N SCOTTSDALE ROAD SCOTTSDALE, AZ 85257	47-2200450	N/A	75,000.	0.			MCNULTY PRIZE WINNER
WE GOT US NOW, INC 228 PARK AVENUE S, PMB 83277 NEW YORK, NY 10003	36-4819384	501(C)(3)	75,000.	0.			ASCEND FELLOWSHIP IMPACT FUND GRANT
SAN AUGUSTINE INDEPENDENT SCHOOL DISTRICT - 1002 BARRETT STREET - SAN AUGUSTINE, TX 75972	75-6002410	GOV'T	74,000.	0.			INNOVATION FUND PLANNING PHASE AWARD, OPPORTUNITY YOUTH FORUM (OYF) GRANT
JASPER INDEPENDENT SCHOOL DISTRICT 128 PARK STREET JASPER, TX 75951	74-6001456	GOV'T	66,000.	0.			OPPORTUNITY YOUTH FORUM (OYF) DATA ENHANCEMENT GRANT
MISSOURI STATE UNIVERSITY 901 S NATIONAL AVENUE SPRINGFIELD, MO 65897	44-6000308	501(C)(3)	61,178.	0.			STEVENS INITIATIVE VIRTUAL EXCHANGE PROGRAM

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HEART OF TEXAS BEHAVIORAL HEALTH NETWORK - PO BOX 890 - WACO, TX 76703	74-1622958	GOV'T	60,000.	0.			INNOVATION FUND PLANNING PHASE AWARD
SEATTLE UNIVERSITY 901 12TH AVENUE SEATTLE, WA 98122	91-0565006	501(C)(3)	57,980.	0.			STEVENS INITIATIVE VIRTUAL EXCHANGE PROGRAM
TIDEPOOL PROJECT 555 BRYANT STREET, BOX 429 PALO ALTO, CA 94301	46-2302287	501(C)(3)	56,500.	0.			NONPROFIT FELLOWSHIP PARTICIPATION AND HONORARIUM
EMPOWER MT 2300 REGENT STREET, SUITE 101 MISSOULA, MT 59801	81-0526099	501(C)(3)	50,000.	0.			BELONGING, MEANING, WELLBEING, AND PURPOSE (BMWFP) AWARD
OHIO STATE UNIVERSITY 901 WOODY HAYES BOULEVARD COLUMBUS, OH 43210	31-6025986	501(C)(1)	50,000.	0.			KESSLER SCHOLARS COLLAB GRANT
TRUSTEES OF COLUMBIA UNIVERSITY IN THE CITY OF NEW YORK - 622 WEST 113TH STREET - NEW YORK, NY 10025	13-5598093	501(C)(3)	50,000.	0.			FFEI - IMPACT FUND GRANT
WORLD RESOURCES INSTITUTE 10 G STREET NE, SUITE 800 WASHINGTON, DC 20002	52-1257057	501(C)(3)	50,000.	0.			TRACK II US-INDIA DIALOGUE AWARD
WORLD WIDE SCHOLASTIC ESPORTS FOUNDATION INC - 1428 TUGALOO DRIVE NE - BROOKHAVEN, GA 30319	85-3869024	501(C)(3)	48,162.	0.			STEVENS INITIATIVE VIRTUAL EXCHANGE PROGRAM
TIDES CENTER 1012 TORNEY AVENUE SAN FRANCISCO, CA 94129	94-3213100	501(C)(3)	47,500.	0.			OPPORTUNITY YOUTH FORUM (OYF) HONORARIUM, IMPA - IMPACT FUND GRANT

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KISSAQ KINGIKMIURAGUQTUAT 709 WINTER HAVEN STREET ANCHORAGE, AK 99504	92-0448891	501(C)(3)	35,000.	0.			IMPA - 2022 FELLOWS IMPACT FUND GRANT
KOCHAI BOOKS INC 3215 TREASURE ISLAND ROAD WEST SACRAMENTO, CA 95691	82-3842413	N/A	35,000.	0.			2023 ASPEN WORDS LITERARY PRIZE (AWLP) WINNER
ONEAMERICA 1225 S WELLER STREET, #430 SEATTLE, WA 98144	20-0384893	501(C)(3)	32,000.	0.			IMPA - 2022 FELLOWS IMPACT FUND GRANT
SHINING HOPE FOR COMMUNITIES INC 175 VARICK STREET, 6TH FLOOR NEW YORK, NY 10014	27-1493201	501(C)(3)	30,000.	0.			TO PROVIDE ADVOCACY AND COMMUNITY ORGANIZATION AROUND COVID-19 PREVENTION AND VACCINES
WILKES COUNTY NC 6598 BOONE TRAIL MILLERS CREEK, NC 28651	56-6001133	GOV'T	30,000.	0.			2023 WILKES WEAVER AWARD
LOCAL INITIATIVES SUPPORT CORPORATION - 28 LIBERTY STREET, 34TH FLOOR - NEW YORK, NY 10005	13-3030229	501(C)(3)	27,400.	0.			GLOBAL OPPORTUNITY YOUTH NETWORK (GOYN) AND OPPORTUNITY YOUTH FORUM (OYF) GRANTS
ROSE WOMEN'S FOUNDATION 22 SANDALFOOT COURT POTOMAC, MD 20854	82-4390107	501(C)(3)	27,225.	0.			SUPPORT FOR WOMEN MICRO-ENTERPRISES
HUMBOLDT AREA FOUNDATION 990 FRONT STREET CRESCENT, CA 95546	23-7310660	501(C)(3)	26,000.	0.			OPPORTUNITY YOUTH FORUM (OYF) DATA ENHANCEMENT GRANT AND VISIT HONORARIUM
LAGUANA COMMUNITY FOUNDATION PO BOX 62 LAGUANA, NM 87026	46-0990639	501(C)(3)	25,000.	0.			TO SUPPORT PARTICIPATION IN OPPORTUNITY YOUTH FORUM

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MEXICAN AMERICAN CHAMBER OF COMMERCE - 222 MERCHANDISE MART PLAZA, SUITE 1212 - CHICAGO, IL 60654	36-3778777	501(C)(6)	25,000.	0.			IHCC CORAMA PLATFORM
MIAMI FOUNDATION INC 40 NW 3RD STREET, SUITE 305 MIAMI, FL 33128	65-0350357	501(C)(3)	25,000.	0.			CITY LEARNING AND ACTION LAB
MONTANA HIGHER EDUCATION STUDENT ASSISTANCE CORPORATION - PO BOX 5209 - HELENA, MT 59604	81-0393527	501(C)(3)	25,000.	0.			BELONGING, MEANING, WELLBEING, AND PURPOSE (BMWFP) AWARD
WESTSIDE DEVELOPMENT CORPORATION 610 SW 41ST STREET SAN ANTONIO, TX 78237	38-3765724	N/A	25,000.	0.			NAVIGATOR PROGRAM
AMARILLO AREA FOUNDATION INC 801 S FILMORE, SUITE 700 AMARILLO, TX 79101	75-0978220	501(C)(3)	24,000.	0.			INNOVATION FUND PLANNING PHASE AWARD
GREATER WACO COLLECTIVE IMPACT INITIATIVE - 1105 WOODDED ACRES DRIVE, SUITE 400 - WACO, TX 76710	46-5714986	501(C)(3)	24,000.	0.			INNOVATION FUND PLANNING PHASE AWARD
UNIVERSITY OF TEXAS AT EL PASO 500 W UNIVERSITY AVENUE EL PASO, TX 79968	74-6000813	501(C)(3)	24,000.	0.			INNOVATION FUND SUPPLEMENTAL AWARD
VILCAP INC 1101 K STREET NW, SUITE 920 WASHINGTON, DC 20005	27-4059343	501(C)(3)	22,098.	0.			ADVANCING WOMEN'S EMPOWERMENT CATALYST FUND
ARIZONA STATE UNIVERSITY PO BOX 876011 TEMPE, AZ 85287	86-0196696	501(C)(3)	20,677.	0.			STEVENS INITIATIVE VIRTUAL EXCHANGE PROGRAM

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AEQUITAS HEALTH 908 S. BUCKEYE AVENUE SIOUX FALLS, SD 57110	86-1852003	501(C)(3)	20,000.	0.			MCNULTY PRIZE CATALYST FUNDING
CENTER FOR AMERICAN PROGRESS 1333 H STREET NW, 10TH FLOOR WASHINGTON, DC 20016	30-0126510	501(C)(3)	20,000.	0.			TRACK II US-INDIA DIALOGUE PARTNERSHIP
FINPUBLICA, INC. 70 HOLLYWOOD DRIVE HASTINGS ON HUDSON, NY 10706	92-0703540	501(C)(3)	20,000.	0.			ADAM WASSERMAN'S SPARK GRANT AWARD 2023
HEAR FOUNDATION 200 S. LINDEN AVENUE PITTSBURGH, PA 15208	88-1887320	501(C)(3)	20,000.	0.			PROGRAM SUPPORT
PROCURE IMPACT 2709 WOOLLEY PLACE FALLS CHURCH, VA 22046	92-3508063	N/A	20,000.	0.			LAUREN MCCANN'S SPARK GRANT AWARD 2023
RECONSTRUCTION US, INC 1283 TUNICA STREET, BOX 80160 MEMPHIS, TN 38108	85-0672416	N/A	20,000.	0.			PROGRAM SUPPORT
ONslow COUNTY PUBLIC SCHOOLS 200 BROADHURST ROAD JACKSONVILLE, NC 28540	56-6001089	GOV'T	19,231.	0.			STEVENS INITIATIVE VIRTUAL EXCHANGE PROGRAM
SMITHSONIAN INSTITUTION PO BOX 37012, MRC 1205 WASHINGTON, DC 20013	53-0206027	501(C)(3)	18,065.	0.			STEVENS INITIATIVE VIRTUAL EXCHANGE PROGRAM
DENVER WORLD AFFAIRS COUNCIL 3607 MARTIN LUTHER KING JR BOULEVAR DENVER, CO 80205	45-4346778	501(C)(3)	13,185.	0.			STEVENS INITIATIVE VIRTUAL EXCHANGE PROGRAM

Schedule I (Form 990)

**Part II** Continuation of Grants and Other Assistance to Domestic Organizations and Domestic Governments (Schedule I (Form 990), Part II.)

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of noncash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
MARCHITECTURE 4653 CARMEL MOUNTAIN ROAD, SUITE 30 SAN DIEGO, CA 92130	26-4158944	N/A	12,000.	0.			ACCELERATOR PROGRAM HONORARIUM
CHEYENNE RIVER YOUTH PROJECT INC PO BOX 410 EAGLE BUTTE, SD 57625	46-0423106	501(C)(3)	10,000.	0.			SUPPORT FRESH TRACKS INITIATIVE
GOOD JOBS INSTITUTE 104 MT AUBURN STREET, 5F CAMBRIDGE, MA 02138	82-0730634	501(C)(3)	10,000.	0.			ECONOMIC OPPORTUNITIES PROGRAM (EOP) GRANT
HOOPA TRIBAL EDUCATION ASSOCIATION PO BOX 1348 HOOPA, CA 95546	94-1477040	TRIBAL UNIV.	10,000.	0.			TO SUPPORT YOUTH ATTENDANCE AT THE OPPORTUNITY YOUTH FORUM
ACHIEVING THE DREAM, INC. 8483 GEORGIA AVENUE, SUITE 500 SILVER SPRING, MD 20910	27-1635830	501(C)(3)	9,500.	0.			RELIGIOUS PLURALISM FUNDERS CIRCLE (RPFC) HONORARIUM
JENNA MAKES GOOD 1111 NELSON STREET HOMINY, OK 74035	50-2276305	N/A	8,500.	0.			BRAVE HEART FELLOWSHIP STIPEND, DEMOCRACY IS INDIGENOUS PROJECT SUPPORT AWARD
BUSTELO SOLUTIONS INC 5644 N. BOSTON AVENUE PORTLAND, OR 97217	84-3305704	N/A	8,000.	0.			ACCELERATOR PROGRAM HONORARIUM
VERITAS GLOBAL ADVISORS LLC 1117 11TH SREET, APT 7 SANTA MONICA, CA 90403	82-2863686	N/A	8,000.	0.			ACCELERATOR PROGRAM HONORARIUM
CONNECT TO COMPETE, INC. 714 W OLYMPIC BOULEVARD, SUITE 924 LOS ANGELES, CA 90015	45-4868462	501(C)(3)	7,000.	0.			2023 DIGITAL EQUITY ACCELERATOR HONORARIUM, NONPROFIT FELLOWSHIP PARTICIPATION

Schedule I (Form 990)

**Part II** Continuation of Grants and Other Assistance to Domestic Organizations and Domestic Governments (Schedule I (Form 990), Part II.)

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of noncash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
DATAKIND, INC 271 CADMAN PLZ E, UNIT 24554 BROOKLYN, NY 11202	46-4082076	501(C)(3)	6,750.	0.			NONPROFIT FELLOWSHIP PARTICIPATION
G CODE INC 43 HUTCHINGS STREET BOSTON, MA 02121	84-4207656	501(C)(3)	6,750.	0.			NONPROFIT FELLOWSHIP PARTICIPATION
LAND INSTITUTE 2440 E WATER WELL ROAD SALINA, KS 67401	48-0842156	501(C)(3)	6,750.	0.			NONPROFIT FELLOWSHIP PARTICIPATION
NORWEST SIDE HOUSING CENTER 5233 WEST DIVERSEY CHICAGO, IL 60639	20-1413891	501(C)(3)	6,750.	0.			NONPROFIT FELLOWSHIP PARTICIPATION
NPOWER INC. 55 WASHINGTON STREET, SUITE 560 BROOKLYN, NY 11201	13-4145441	501(C)(3)	6,750.	0.			NONPROFIT FELLOWSHIP PARTICIPATION
PACIFIC PEERING CONSERVANCY INC 2288 GLENMORE TERRACE ROCKVILLE, MD 20850	93-2751274	N/A	6,750.	0.			NONPROFIT FELLOWSHIP PARTICIPATION
ROCHESTER INSTITUTE OF TECHNOLOGY 7 LOMB MEMORIAL DRIVE ROCHESTER, NY 14623	16-0743140	501(C)(3)	6,750.	0.			NONPROFIT FELLOWSHIP PARTICIPATION
TECH INTEGRITY INSTITUTE 147 WITHERS STREET, APT. R BROOKLYN, NY 11211	87-2867555	501(C)(3)	6,750.	0.			NONPROFIT FELLOWSHIP PARTICIPATION
BAY AREA COMMUNITY RESOURCES INC 171 CARLOS DRIVE SAN RAFAEL, CA 94903	94-2346815	501(C)(3)	6,500.	0.			OPPORTUNITY YOUTH FORUM (OYF) ANNUAL ASSESSMENT STIPEND AND TRAVEL SUPPORT GRANT

Schedule I (Form 990)



**Part II** Continuation of Grants and Other Assistance to Domestic Organizations and Domestic Governments (Schedule I (Form 990), Part II.)

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of noncash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
CAPITAL WORKFORCE PARTNERS INC ONE UNION PLACE HARTFORD, CT 06103	06-1013293	501(C)(3)	6,500.	0.			OPPORTUNITY YOUTH FORUM (OYF) ANNUAL ASSESSMENT STIPEND AND TRAVEL SUPPORT GRANT
COMMUNITY FOUNDATION FOR GREATER BUFFALO INC - 726 EXCHANGE STREET, SUITE 525 - BUFFALO, NY 14210	22-2743917	501(C)(3)	6,500.	0.			OPPORTUNITY YOUTH FORUM (OYF) ANNUAL ASSESSMENT STIPEND AND TRAVEL SUPPORT GRANT
DETROIT EMPLOYMENT SOLUTIONS CORPORATION - 115 ERSKINE, 2ND FLOOR - DETROIT, MI 48201	38-3353746	501(C)(3)	6,500.	0.			OPPORTUNITY YOUTH FORUM (OYF) ANNUAL ASSESSMENT STIPEND AND LEARNING GRANT FOR DETROIT
EDUDREAM 227 W MONROE STREET, SUITE 2100 CHICAGO, IL 60606	81-2532495	N/A	6,500.	0.			NONPROFIT FELLOWSHIP PARTICIPATION
UNIVERSITY OF MAINE SYSTEM INC 96 FALMOUTH STREET, PO BOX 9300 PORTLAND, ME 04104	01-6000769	501(C)(3)	6,500.	0.			OPPORTUNITY YOUTH FORUM (OYF) ANNUAL ASSESSMENT STIPEND AND TRAVEL SUPPORT GRANT
URBAN STRATEGIES COUNCIL 2323 BROADWAY, SUITE 103 OAKLAND, CA 94612	94-3044453	501(C)(3)	6,500.	0.			OPPORTUNITY YOUTH FORUM (OYF) ANNUAL ASSESSMENT STIPEND AND LEARNING PARTNER GRANT
URBAN CODERS GUILD 1037 WEST 63RD STREET NORTH TULSA, OK 74126	82-2797562	501(C)(3)	6,375.	0.			NONPROFIT FELLOWSHIP PARTICIPATION
PARKER INSTITUTE FOR CANCER IMMUNOTHERAPY - 1 LETTERMAN DRIVE, D3500 - SAN FRANCISCO, CA 94129	47-3355381	501(C)(3)	6,000.	0.			NONPROFIT FELLOWSHIP PARTICIPATION
MDC INC 307 WEST MAIN STREET DURHAM, NC 27701	56-0894222	501(C)(3)	5,500.	0.			COMMUNITY STRATEGIES GROUP (CSG) 2023 RARE AND TRALE HONORARIUM

Schedule I (Form 990)



**Part III Grants and Other Assistance to Domestic Individuals.** Complete if the organization answered "Yes" on Form 990, Part IV, line 22.  
Part III can be duplicated if additional space is needed.

(a) Type of grant or assistance	(b) Number of recipients	(c) Amount of cash grant	(d) Amount of non-cash assistance	(e) Method of valuation (book, FMV, appraisal, other)	(f) Description of noncash assistance
HONORARIA	373	665,829.	0.		
EVENT PARTICIPATION STIPEND	101	170,415.	0.		
AWARDS	49	278,581.	0.		

**Part IV Supplemental Information.** Provide the information required in Part I, line 2; Part III, column (b); and any other additional information.

PART I, LINE 2:

THE INSTITUTE PERIODICALLY ENGAGES OTHER ENTITIES TO FURTHER THE OBJECTIVES

SET FORTH IN OUR GRANT AGREEMENTS. THIS IS TYPICALLY DONE VIA SUB-AWARDS OR

RE-GRANTS THAT RUN CONCURRENTLY WITH THE PRIME AWARD IN WHICH THE SUB

RECIPIENTS ARE ADVISED OF ALL APPLICABLE LAWS AND REGULATIONS, AND ALL

APPROPRIATE FLOW-DOWN PROVISIONS FROM THE PRIME AGREEMENT. ALL SUB GRANTEES

OR SERVICE PROVIDERS MUST ALSO CERTIFY THAT IT DOES NOT AND WILL NOT

KNOWINGLY PROVIDE MATERIAL SUPPORT OR RESOURCES TO ANY INDIVIDUAL OR ENTITY

INVOLVED WITH TERRORISM (INCLUDING ANY INDIVIDUALS ENTITIES OR GROUPS

**Part IV Supplemental Information**

SUBJECT TO OFAC SANCTIONS) OR TO ANYONE WHO ACTS AS AN AGENT FOR SUCH AN  
INDIVIDUAL OR ENTITY, ANY VIOLATION OF THIS CERTIFICATION MUST BE GROUNDS  
FOR IMMEDIATE TERMINATION OF THE LETTER OF AGREEMENT AND RETURN OF ALL  
GRANT FUNDS.

THE FREQUENCY AND SCOPE OF RESEARCH PROGRAM'S MONITORING PROCEDURES ARE  
DETERMINED JOINTLY BY THE RESPONSIBLE PROGRAM MANAGER AND RESPECTIVE GRANT  
ADMINISTRATOR/FINANCIAL ANALYST. THIS INCLUDES THE ROUTINE RECEIPT AND  
REVIEW OF THE NARRATIVE AND FINANCIAL REPORTS, A REVIEW OF EXPENSES TO  
BUDGET, THE OPTION TO PERFORM AUDITS, AND ALLOWS FOR THE PERFORMANCE OF  
SITE VISITS IF NECESSARY. THE INSTITUTE IS NOTIFIED WHENEVER PROBLEMS  
DELAYS OR OTHER CONDITIONS DEVELOP WHICH WOULD HAVE SIGNIFICANT IMPACT UPON  
THE PROJECT. BUDGET REVISIONS ARE ALLOWED WITHIN THE PARAMETERS SET FORTH  
IN EACH SUB AWARD. THE PAYMENT SCHEDULE AND THE DEGREE OF FLEXIBILITY  
OFFERED MAY DEPEND ON PREVIOUS EXPERIENCE WITH THE RECIPIENT, THE DEGREE OF  
EXTERNAL OVERSIGHT BY OTHER PARTIES, AND THE SOPHISTICATION OF THE  
RECIPIENT'S ADMINISTRATIVE SYSTEMS.

PART II, LINE 1, COLUMN (H):

NAME OF ORGANIZATION OR GOVERNMENT: LONE STAR JUSTICE ALLIANCE

(H) PURPOSE OF GRANT OR ASSISTANCE: INNOVATION FUND PLANNING PHASE  
AWARD, AUSTIN OPPORTUNITY YOUTH COLLABORATIVE (AOYC) GRANT

NAME OF ORGANIZATION OR GOVERNMENT: SHINING HOPE FOR COMMUNITIES INC

(H) PURPOSE OF GRANT OR ASSISTANCE: TO PROVIDE ADVOCACY AND COMMUNITY  
ORGANIZATION AROUND COVID-19 PREVENTION AND VACCINES AWARENESS

NAME OF ORGANIZATION OR GOVERNMENT:

**Part IV Supplemental Information**

DETROIT EMPLOYMENT SOLUTIONS CORPORATION

(H) PURPOSE OF GRANT OR ASSISTANCE: OPPORTUNITY YOUTH FORUM (OYF) ANNUAL

ASSESSMENT STIPEND AND LEARNING GRANT FOR DETROIT COLLABORATIVE

Multiple horizontal lines for supplemental information.

**SCHEDULE J  
(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Compensation Information**

For certain Officers, Directors, Trustees, Key Employees, and Highest  
Compensated Employees  
Complete if the organization answered "Yes" on Form 990, Part IV, line 23.  
Attach to Form 990.  
Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

OMB No. 1545-0047

**2023**

Open to Public  
Inspection

Name of the organization

THE ASPEN INSTITUTE, INC.

Employer identification number

84-0399006

**Part I Questions Regarding Compensation**

**1a** Check the appropriate box(es) if the organization provided any of the following to or for a person listed on Form 990, Part VII, Section A, line 1a. Complete Part III to provide any relevant information regarding these items.

- |  |  |
|--|--|
| <input type="checkbox"/> First-class or charter travel             | <input type="checkbox"/> Housing allowance or residence for personal use   |
| <input checked="" type="checkbox"/> Travel for companions          | <input type="checkbox"/> Payments for business use of personal residence   |
| <input type="checkbox"/> Tax indemnification and gross-up payments | <input type="checkbox"/> Health or social club dues or initiation fees     |
| <input type="checkbox"/> Discretionary spending account            | <input type="checkbox"/> Personal services (such as maid, chauffeur, chef) |

**b** If any of the boxes on line 1a are checked, did the organization follow a written policy regarding payment or reimbursement or provision of all of the expenses described above? If "No," complete Part III to explain .....

**2** Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all directors, trustees, and officers, including the CEO/Executive Director, regarding the items checked on line 1a? .....

**3** Indicate which, if any, of the following the organization used to establish the compensation of the organization's CEO/Executive Director. Check all that apply. Do not check any boxes for methods used by a related organization to establish compensation of the CEO/Executive Director, but explain in Part III.

- |   |   |
|---|---|
| <input checked="" type="checkbox"/> Compensation committee              | <input type="checkbox"/> Written employment contract                                |
| <input checked="" type="checkbox"/> Independent compensation consultant | <input checked="" type="checkbox"/> Compensation survey or study                    |
| <input checked="" type="checkbox"/> Form 990 of other organizations     | <input checked="" type="checkbox"/> Approval by the board or compensation committee |

**4** During the year, did any person listed on Form 990, Part VII, Section A, line 1a, with respect to the filing organization or a related organization:

- a** Receive a severance payment or change-of-control payment? .....
- b** Participate in or receive payment from a supplemental nonqualified retirement plan? .....
- c** Participate in or receive payment from an equity-based compensation arrangement? .....
- If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III.

**Only section 501(c)(3), 501(c)(4), and 501(c)(29) organizations must complete lines 5-9.**

**5** For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the revenues of:

- a** The organization? .....
- b** Any related organization? .....
- If "Yes" on line 5a or 5b, describe in Part III.

**6** For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the net earnings of:

- a** The organization? .....
- b** Any related organization? .....
- If "Yes" on line 6a or 6b, describe in Part III.

**7** For persons listed on Form 990, Part VII, Section A, line 1a, did the organization provide any nonfixed payments not described on lines 5 and 6? If "Yes," describe in Part III .....

**8** Were any amounts reported on Form 990, Part VII, paid or accrued pursuant to a contract that was subject to the initial contract exception described in Regulations section 53.4958-4(a)(3)? If "Yes," describe in Part III .....

**9** If "Yes" on line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53.4958-6(c)? .....

	Yes	No
<b>1b</b>	X	
<b>2</b>	X	
<b>4a</b>		X
<b>4b</b>		X
<b>4c</b>		X
<b>5a</b>		X
<b>5b</b>		X
<b>6a</b>		X
<b>6b</b>		X
<b>7</b>		X
<b>8</b>		X
<b>9</b>		

For Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule J (Form 990) 2023

**Part II Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees.** Use duplicate copies if additional space is needed.

For each individual whose compensation must be reported on Schedule J, report compensation from the organization on row (i) and from related organizations, described in the instructions, on row (ii). Do not list any individuals that aren't listed on Form 990, Part VII.

**Note:** The sum of columns (B)(i)-(iii) for each listed individual must equal the total amount of Form 990, Part VII, Section A, line 1a, applicable column (D) and (E) amounts for that individual.

(A) Name and Title		(B) Breakdown of W-2 and/or 1099-MISC and/or 1099-NEC compensation			(C) Retirement and other deferred compensation	(D) Nontaxable benefits	(E) Total of columns (B)(i)-(D)	(F) Compensation in column (B) reported as deferred on prior Form 990
		(i) Base compensation	(ii) Bonus & incentive compensation	(iii) Other reportable compensation				
(1) DANIEL PORTERFIELD PRESIDENT & CEO	(i)	666,400.	0.	123,501.	43,120.	10,422.	843,443.	0.
	(ii)	0.	0.	0.	0.	0.	0.	0.
(2) ELLIOT GERSON EXECUTIVE VP	(i)	490,845.	0.	86,054.	49,500.	7,530.	633,929.	0.
	(ii)	0.	0.	0.	0.	0.	0.	0.
(3) DAVID LANGSTAFF EXECUTIVE VP	(i)	441,293.	0.	8,450.	47,215.	8,766.	505,724.	0.
	(ii)	0.	0.	0.	0.	0.	0.	0.
(4) CYNTHIA MCKEE EVP INSTITUTIONAL ADVANCEMENT	(i)	445,433.	0.	4,881.	33,000.	5,085.	488,399.	0.
	(ii)	0.	0.	0.	0.	0.	0.	0.
(5) ANDREW AXELROD EVP FINANCE & ENTERPRISE BUS DEV.	(i)	450,000.	0.	2,148.	7,615.	4,835.	464,598.	0.
	(ii)	0.	0.	0.	0.	0.	0.	0.
(6) STEPHEN PATRICK EXECUTIVE VP	(i)	368,437.	0.	2,516.	49,500.	10,355.	430,808.	0.
	(ii)	0.	0.	0.	0.	0.	0.	0.
(7) ANNE MOSLE VP, EXECUTIVE DIRECTOR	(i)	364,103.	0.	2,601.	49,500.	10,364.	426,568.	0.
	(ii)	0.	0.	0.	0.	0.	0.	0.
(8) JAMES SPIEGELMAN SENIOR ADVISOR	(i)	346,914.	0.	7,430.	49,500.	10,348.	414,192.	0.
	(ii)	0.	0.	0.	0.	0.	0.	0.
(9) MIECHA FORBES VP, PEOPLE AND CULTURE	(i)	369,508.	0.	878.	23,406.	10,360.	404,152.	0.
	(ii)	0.	0.	0.	0.	0.	0.	0.
(10) MARIA ACEBAL VP STRATEGIC DEV CORP SECRETARY	(i)	316,100.	22,291.	2,516.	37,323.	1,890.	380,120.	0.
	(ii)	0.	0.	0.	0.	0.	0.	0.
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							

**Part III** Supplemental Information

Provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 3, 4a, 4b, 4c, 5a, 5b, 6a, 6b, 7, and 8, and for Part II. Also complete this part for any additional information.

PART I, LINE 1A:

THE ASPEN INSTITUTE FOLLOWS A POLICY GOVERNING EXPENSE REIMBURSEMENT AND

COMPLIES WITH TRAVEL GUIDELINES APPLICABLE TO ALL EMPLOYEES.



**SCHEDULE M  
(Form 990)**

**Noncash Contributions**

OMB No. 1545-0047

**2023**

Open to Public Inspection

Complete if the organizations answered "Yes" on Form 990, Part IV, lines 29 or 30.  
Attach to Form 990.

Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

Department of the Treasury  
Internal Revenue Service

Name of the organization: **THE ASPEN INSTITUTE, INC.**  
Employer identification number: **84-0399006**

<b>Part I</b>	<b>Types of Property</b>	<b>(a)</b> Check if applicable	<b>(b)</b> Number of contributions or items contributed	<b>(c)</b> Noncash contribution amounts reported on Form 990, Part VIII, line 1g	<b>(d)</b> Method of determining noncash contribution amounts
1	Art - Works of art				
2	Art - Historical treasures				
3	Art - Fractional interests				
4	Books and publications				
5	Clothing and household goods				
6	Cars and other vehicles				
7	Boats and planes				
8	Intellectual property				
9	Securities - Publicly traded	X	43	9,436,141.	FMV
10	Securities - Closely held stock				
11	Securities - Partnership, LLC, or trust interests				
12	Securities - Miscellaneous				
13	Qualified conservation contribution - Historic structures				
14	Qualified conservation contribution - Other				
15	Real estate - Residential				
16	Real estate - Commercial				
17	Real estate - Other				
18	Collectibles				
19	Food inventory				
20	Drugs and medical supplies				
21	Taxidermy				
22	Historical artifacts				
23	Scientific specimens				
24	Archeological artifacts				
25	Other ( )				
26	Other ( )				
27	Other ( )				
28	Other ( )				

29 Number of Forms 8283 received by the organization during the tax year for contributions for which the organization completed Form 8283, Part V, Donee Acknowledgement ..... **29**

	Yes	No
30a During the year, did the organization receive by contribution any property reported in Part I, lines 1 through 28, that it must hold for at least 3 years from the date of the initial contribution, and which isn't required to be used for exempt purposes for the entire holding period? .....		X
b If "Yes," describe the arrangement in Part II.		
31 Does the organization have a gift acceptance policy that requires the review of any nonstandard contributions? .....	X	
32a Does the organization hire or use third parties or related organizations to solicit, process, or sell noncash contributions? .....		X
b If "Yes," describe in Part II.		
33 If the organization didn't report an amount in column (c) for a type of property for which column (a) is checked, describe in Part II.		

For Paperwork Reduction Act Notice, see the Instructions for Form 990. Schedule M (Form 990) 2023

**Part II Supplemental Information.** Provide the information required by Part I, lines 30b, 32b, and 33, and whether the organization is reporting in Part I, column (b), the number of contributions, the number of items received, or a combination of both. Also complete this part for any additional information.

SCHEDULE M, PART I, COLUMN (B):

THIS COLUMN REPRESENTS THE NUMBER OF ACTUAL CONTRIBUTIONS, NOT THE NUMBER OF ITEMS CONTRIBUTED.

SCHEDULE M, LINE 32B:

THE INSTITUTE HAS A WRITTEN GIFT ACCEPTANCE POLICY. IF A DONOR WANTS TO GIVE A GIFT OUTSIDE OF THAT POLICY, IT WILL BE REVIEWED BY SENIOR MANAGEMENT AND, IF NECESSARY, REFERRED TO THE BOARD OF TRUSTEES.

**SCHEDULE O  
(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Supplemental Information to Form 990 or 990-EZ**

Complete to provide information for responses to specific questions on  
Form 990 or 990-EZ or to provide any additional information.  
Attach to Form 990 or Form 990-EZ.  
Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.

OMB No. 1545-0047

**2023**

Open to Public  
Inspection

Name of the organization

THE ASPEN INSTITUTE, INC.

Employer identification number

84-0399006

FORM 990, PART I, LINE 1, DESCRIPTION OF ORGANIZATION MISSION:

FOR A BETTER WORLD. WE DRIVE CHANGE THROUGH DIALOGUE, LEADERSHIP, AND  
ACTION TO HELP SOLVE THE GREATEST CHALLENGES OF OUR TIME IN SERVICE OF  
A MORE FREE, JUST, AND EQUITABLE SOCIETY. WE DO THIS BY FACILITATING  
DIALOGUE AND CURATING CONVENINGS, DEVELOPING LEADERS AND LEADERSHIP,  
AND ENABLING SOLUTIONS.

FORM 990, PART III, LINE 1, DESCRIPTION OF ORGANIZATION MISSION:

THE ASPEN INSTITUTE IGNITES HUMAN POTENTIAL TO BUILD UNDERSTANDING AND  
CREATE NEW POSSIBILITIES FOR A BETTER WORLD. WE DRIVE CHANGE THROUGH  
DIALOGUE, LEADERSHIP, AND ACTION TO HELP SOLVE THE GREATEST CHALLENGES  
OF OUR TIME IN SERVICE OF A MORE FREE, JUST, AND EQUITABLE SOCIETY. WE  
DO SO BY CONVENING A BROAD SPECTRUM OF PEOPLE, WITH A FOCUS ON  
DIALOGUE, COMMUNITY BUILDING, AND CREATIVE COLLABORATION; CREATING  
TRANSFORMATIONAL EXPERIENCES THAT ENABLE DIVERSE LEADERS TO DISCOVER  
AND REFINE THEIR APPROACHES; AND ENABLING POWERFUL, PRACTICAL, AND  
APPLICABLE SOLUTIONS THAT ACCELERATE PROGRESS, EMPHASIZING CO-CREATION  
AND PARTNERSHIP. THE ASPEN INSTITUTE IS HEADQUARTERED IN WASHINGTON,  
DC, AND HAS A CAMPUS IN ASPEN, COLORADO, AS WELL AS AN INTERNATIONAL  
NETWORK OF PARTNERS.

FORM 990, PART III, LINE 4D, OTHER PROGRAM SERVICES:

OTHER RESTRICTED PROGRAMS, ASPEN GLOBAL LEADERSHIP NETWORK AND  
INNOVATION FUNDS, YOUTH AND ENGAGEMENT, AND SEMINARS

EXPENSES \$ 27,217,962. INCL GRANTS OF \$ 1,553,181. REVENUE \$ 3,529,661.

For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ.

Schedule O (Form 990) 2023

LHA 332211 11-14-23

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FORM 990, PART VI, SECTION B, LINE 11B:

THE FEDERAL FORM 990 OF THE INSTITUTE IS PREPARED BY AN EXTERNAL ACCOUNTING FIRM USING INFORMATION OBTAINED FROM INSTITUTE'S STAFF. ONCE THE INITIAL DRAFT IS PREPARED, IT IS REVIEWED BY SR. FINANCE/ACCOUNTING STAFF. IF NECESSARY, CHANGES ARE MADE AND ANOTHER DRAFT IS ISSUED.

THE SECOND DRAFT FORM 990 IS REVIEWED BY AN APPOINTED MEMBER OF THE AUDIT COMMITTEE ALONG WITH THE EVP FINANCE & ENTERPRISE BUSINESS DEVELOPMENT. IF NECESSARY, CHANGES ARE MADE AND ANOTHER DRAFT IS ISSUED.

THE FINAL DRAFT FORM 990 IS PROVIDED TO ALL MEMBERS OF THE AUDIT COMMITTEE, WHICH INCLUDES THE CHAIR OF THE BOARD OF TRUSTEES. ONCE APPROVED, COPIES ARE THEN DISTRIBUTED TO ALL BOARD MEMBERS BEFORE THE RETURN IS FILED WITH THE INTERNAL REVENUE SERVICE.

FORM 990, PART VI, SECTION B, LINE 12C:

ALL ASPEN INSTITUTE TRUSTEES AND EMPLOYEES ARE REQUIRED ANNUALLY TO COMPLETE AND SIGN A DISCLOSURE AND ACKNOWLEDGEMENT FORM RELATED TO THE INSTITUTE'S CONFLICT OF INTEREST POLICY. SPECIFICALLY, ALL TRUSTEES AND EMPLOYEES ARE REQUIRED TO ACKNOWLEDGE THAT THEY HAVE READ, UNDERSTOOD, AND ARE COMMITTED TO ABIDING BY THE INSTITUTE'S CONFLICT OF INTEREST POLICY, AND TO MAKE CERTAIN DISCLOSURES ABOUT THEIR ACTIVITIES OUTSIDE OF WORK AND FINANCES TO HELP IDENTIFY POSSIBLE CONFLICTS OF INTEREST. ALL EMPLOYEE FORMS ARE SUBMITTED TO THE HUMAN RESOURCES DEPARTMENT, WHICH REVIEWS THEM AND HAS DISCRETION, IN COORDINATION WITH THE GENERAL COUNSEL AND SENIOR MANAGEMENT, TO MAKE RECOMMENDATIONS OR RAISE CONCERNS WITH AFFECTED INDIVIDUALS AS APPROPRIATE. ALL TRUSTEE FORMS ARE SUBMITTED TO THE OFFICE

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OF THE CORPORATE SECRETARY, WHICH REVIEWS THEM ALONG WITH THE GENERAL COUNSEL. MAJOR CONFLICT OF INTEREST ISSUES INVOLVING TRUSTEES AND/OR SENIOR MANAGEMENT ARE REFERRED TO THE AUDIT COMMITTEE OF THE BOARD OF TRUSTEES FOR RESOLUTION. THE CORPORATE SECRETARY, GENERAL COUNSEL AND SENIOR MANAGEMENT REGULARLY CONFER WITH THE CHAIR OF THE AUDIT COMMITTEE REGARDING THE INSTITUTE'S CONFLICT OF INTEREST POLICY AND ANY CONFLICT OF INTEREST ISSUES.

FORM 990, PART VI, SECTION B, LINE 15:

THE INSTITUTE CONTRACTS WITH AN EXTERNAL COMPENSATION FIRM TO PERFORM A MARKET ANALYSIS TO SET THE SALARY RANGES FOR ALL OF OUR POSITIONS ANNUALLY. THE COMPENSATION FIRM ANALYZES SALARIES FROM LIKE ORGANIZATIONS TO DETERMINE THE APPROPRIATE SALARY RANGE FOR EACH POSITION IN THE INSTITUTE. THE INSTITUTE'S COMPENSATION PHILOSOPHY IS THAT WE GENERALLY TARGET THE 50TH PERCENTILE OF THE MARKET FOR OUR POSITIONS.

IN ADDITION TO THE ANNUAL MARKET ANALYSIS FOR ALL POSITIONS, WE CONTRACT WITH AN EXTERNAL COMPENSATION CONSULTANT BI-ANNUALLY TO CONDUCT AN IN-DEPTH ANALYSIS FOR OUR PRESIDENT/CEO AND EACH OF OUR EXECUTIVE OFFICERS. EACH EXECUTIVE'S TOTAL COMPENSATION IS BENCHMARKED AGAINST SIMILAR POSITIONS IN COMPARABLE ORGANIZATIONS IN LABOR MARKETS IN WHICH THE INSTITUTE COMPETES FOR EXECUTIVE TALENT. THE RECOMMENDATIONS OF THE CONSULTANT ARE PRESENTED TO THE EXECUTIVE COMMITTEE OF THE BOARD FOR THEIR REVIEW AND ENDORSEMENT. THE PRESIDENT/CEO'S SALARY IS THEN PRESENTED TO THE FULL BOARD FOR FINAL APPROVAL.

FORM 990, PART VI, LINE 17, LIST OF STATES RECEIVING COPY OF FORM 990:

AL, AK, AZ, AR, CA, CO, CT, FL, GA, IL, KS, KY, ME, MD, MA, MI, MN, MS, MO, NH, NJ, NM, NY, NC, ND

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OH, OK, OR, PA, RI, SC, TN, UT, VA, WA, WV, WI

FORM 990, PART VI, SECTION C, LINE 19:

THE DOCUMENTS ARE ALL PUBLISHED ON OUR WEBSITE AND MADE AVAILABLE BY  
REQUEST.

FORM 990, PART IX, LINE 11G, OTHER FEES:

CONTRACTED SERVICES:

PROGRAM SERVICE EXPENSES	2,946,020.
MANAGEMENT AND GENERAL EXPENSES	1,561,155.
FUNDRAISING EXPENSES	0.
TOTAL EXPENSES	4,507,175.

CONSULTANTS:

PROGRAM SERVICE EXPENSES	16,072,037.
MANAGEMENT AND GENERAL EXPENSES	3,722,539.
FUNDRAISING EXPENSES	0.
TOTAL EXPENSES	19,794,576.

MODERATOR AND SPEAKER:

PROGRAM SERVICE EXPENSES	983,834.
MANAGEMENT AND GENERAL EXPENSES	4,400.
FUNDRAISING EXPENSES	0.
TOTAL EXPENSES	988,234.

CONTRIBUTING WRITERS AND RAPORTEURS:

PROGRAM SERVICE EXPENSES	238,999.
MANAGEMENT AND GENERAL EXPENSES	0.

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FUNDRAISING EXPENSES 0.

TOTAL EXPENSES 238,999.

TEMPORARY SERVICES:

PROGRAM SERVICE EXPENSES 321,426.

MANAGEMENT AND GENERAL EXPENSES 383,289.

FUNDRAISING EXPENSES 0.

TOTAL EXPENSES 704,715.

CONTRACTUAL INTERNATIONAL STAFF:

PROGRAM SERVICE EXPENSES 1,748,825.

MANAGEMENT AND GENERAL EXPENSES 0.

FUNDRAISING EXPENSES 0.

TOTAL EXPENSES 1,748,825.

TRANSPORTATION AND SECURITY SERVICES:

PROGRAM SERVICE EXPENSES 695,647.

MANAGEMENT AND GENERAL EXPENSES 6,071.

FUNDRAISING EXPENSES 0.

TOTAL EXPENSES 701,718.

PHOTOGRAPHY:

PROGRAM SERVICE EXPENSES 277,817.

MANAGEMENT AND GENERAL EXPENSES 3,734.

FUNDRAISING EXPENSES 0.

TOTAL EXPENSES 281,551.

ART INSTALLATION:

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PROGRAM SERVICE EXPENSES 60,466.

MANAGEMENT AND GENERAL EXPENSES 10,675.

FUNDRAISING EXPENSES 0.

TOTAL EXPENSES 71,141.

IT SUPPORT SERVICES:

PROGRAM SERVICE EXPENSES 415,643.

MANAGEMENT AND GENERAL EXPENSES 3,126,391.

FUNDRAISING EXPENSES 85,243.

TOTAL EXPENSES 3,627,277.

EQUIPMENT/VEHICLE RENTAL:

PROGRAM SERVICE EXPENSES 7,209.

MANAGEMENT AND GENERAL EXPENSES 414,658.

FUNDRAISING EXPENSES 956.

TOTAL EXPENSES 422,823.

AUDIO VISUAL/DIGITAL SERVICES:

PROGRAM SERVICE EXPENSES 2,808,382.

MANAGEMENT AND GENERAL EXPENSES 115,642.

FUNDRAISING EXPENSES 0.

TOTAL EXPENSES 2,924,024.

PROMOTIONAL EXPENSE:

PROGRAM SERVICE EXPENSES 262,940.

MANAGEMENT AND GENERAL EXPENSES 21,467.

FUNDRAISING EXPENSES 0.

TOTAL EXPENSES 284,407.



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TOTAL OTHER FEES ON FORM 990, PART IX, LINE 11G, COL A 36,295,465.

FORM 990, PART XI, LINE 9, CHANGES IN NET ASSETS:

REFUNDED GRANTS 312,233.