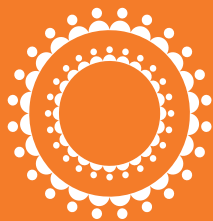


# FACILITATION GUIDE



GIVING CIRCLES FUND

## CONGRATULATIONS!

You have taken the first step in creating a circle of awesomeness also known as a **GIVING CIRCLE!**

We've put together this guide to walk you through how to make the most of your circle experience. We intend for this guide to help you, but feel free to deviate from our path to fit your group better. Don't be shy about reaching out to us with any questions, we're here to help! Any terms **bold and blue** are additional resources that can be found at the end of the guide.



## PART 1: SET UP YOUR CIRCLE

### STEP 1 RECRUIT YOUR GIVING CIRCLE.

Right now you may just be a giving point (or line or triangle or square). How do you make it a giving *circle*?

Start by visualizing your circle. Close your eyes, take a deep breath, and channel your inner **Euclid, the Godfather of Geometry**. If you have a clear understanding of who you want in your circle, skip down to Part 2. If not, start with Part 1.

**Part 1:** Brainstorm different groups you're a part of: book clubs, teams, alumni organizations, professional colleagues or some friends. All of these groups are potential giving circles. Think about how a giving circle could be incorporated into your group, and start with the one that makes the most sense, like your kickball team supporting youth sports or your book club supporting literacy efforts.

**Part 2:** Reach out! Email your friends. Pick up the phone and text, or \*gasp\* even **call** to let your buddies know what's up. We've found that the most effective way to get your friends to join is to reach out to them personally. There are sample emails included at the end of the guide that we encourage you to personalize. It's important to convey why you want to start a circle and why your friends should join. Let your passion shine through!



**Words from the Wise:** It might take some, or a lot of, extra nudging to get your friends to join, particularly if they have never been active in philanthropy before. We included a list of **FAQs about giving circles** to help explain how it works.

### STEP 2 MEETING #1: GET YOUR GROUP TOGETHER

Here's your chance to introduce the members of your circle to each other and get on the same page about your circle values and mission. If everyone in your giving circle is located in close proximity, try hosting in-person meetings whenever possible. Spread across the country? That's cool too! Use **Google Hangouts**, **Skype** or a **free conference line** to meet virtually.



**Words from the Wise:** Hosting a meeting can be tough! Here are some tips:

1. Start with hellos! It can be something formal like an **ice breaker** or **name game**, or you can keep it simple by going around the room and sharing a life update. If you're on a call, go down the list of attendees and ask people to share by name, it's a lot less awkward than waiting for someone else to talk or chatting at the same time. If you're meeting in person, you can schedule the first 15-30 minutes as hang out time before getting down to business.




2. Respect people's time. Set meeting times in advance and start and end on time.

3. Bring food! Low blood sugar = **grumpy people**. If you're meeting in person, snacks and drinks can go a long way to keeping everyone happy, especially if you're meeting around meal time.

## SAMPLE AGENDA

*Recommended timing: Before the first grant cycle. Remember to take notes or ask for a volunteer to help!*

- Introductions
  - » Who are your circle members? (Have everyone share some basic vitals, like name, career, why they joined the circle and a fun fact) Feel free to do an **ice breaker** or **name game**!
  - » Set ground rules, such as "respect each other's opinions," "stay on topic," "everyone contributes." Be creative, or check out **suggestions** online. You should also figure out how your group will make decisions for things other than grants (the website has grant voting built in.) Lay out this ahead of time – before it comes time to decide!
- Circle mission and values
  - » Suggested materials: **Find Your Passion** (Section 2 of the Philanthropy Curriculum) and **Giving Circle Worksheet 21/64** also has really great resources for identifying what means the most to each person, including their **Picture Your Legacy** and **Values** cards. Check out the **Picture Your Legacy app**!
  - » After each person has Found Their Passion – discuss! Find out the common interests your group shares.
  - » Use these passions to define the focus of your giving circle. Is it a specific theme, like education or health? Do you want to make it narrow or keep it broad?
  - » What types of nonprofits do you want to fund? Some priorities to ponder:
    - Organization size
    - Organization type (direct service, advocacy, etc) Check out the **Philanthropy Curriculum** for more information
    - Local, domestic or international?
    - Proven or innovative?
  - » Write your mission statement! This will go on your circle page. Here are some examples:
    - This circle will support organizations that enable freedom and opportunity for young people through mentorship, education, and experience, developing the "whole child," including social and emotional growth.
    - This circle's primary function is to raise money for groups supporting reproductive justice. We will focus on local organizations that have a broad outlook and are building capacity.
- Overview of the process:
  - » **Nominations:** Members can nominate an organization for a grant. Remind everyone to try to find organizations that fit the circle mission.
  - » **Assessments:** Each nominated organization should be assessed. There's an online form to fill out that all circle members can see, and an organization can be assessed by more than one person.
  - » **Voting:** Each person gets one vote and the organization with the most votes wins. Simple as that.
  - »  **Words from the Wise:** Make sure everyone understand that not every nominated organization will receive funding. This is ok! If one of your circle members is upset, encourage them to nominate the organization again.

## SAMPLE AGENDA (CONT.)

- Giving Circle Specifications
  - » **Grant cycle frequency:** The number of grant cycles per year: Quarterly, semi-annually, or annually.
  - » **Number of grants per cycle:** How many organizations will you fund each cycle? You can choose 1-5 but we recommend starting with 1.

Looking for guidance in terms of what to choose for number of grants and grant frequency? Get in touch with [Meredith!](#)



Don't be intimidated by the thought of facilitating a meeting! Here are some tips from us and [the pros](#):

- Silence is not a bad thing! Resist the temptation to fill a long pause with your voice. Someone will eventually speak up.
- Politely ask quieter participants to share their thoughts.
- Ask questions to guide discussion, but be sure not to invoke your own opinion. You want to “[be a guide not a boss.](#)”

## STEP 3 BUILD YOUR CIRCLE

If you haven't already, now is the time to **CREATE YOUR GIVING CIRCLE!**

Use the [Giving Circle worksheet](#) to guide you through building a circle.

Hear that faint cheering? That's us unable to contain our [excitement](#) that you're building a giving circle! Log in at [www.givingcirclesfund.org](http://www.givingcirclesfund.org) and click on “Build One” on the home page.

**Time Out!** *Did you already build your circle online? Totally cool! Worried because your circle's priorities different from what you initially set when you built your circle? Don't be! [Meredith](#) can help you change your circle settings.*

## STEP 4 NOMINATE AN ORGANIZATION

A grant cycle begins when a member of the circle submits the first nomination. You **MUST** nominate an organization to start your grant cycle. We require grantees to be 501(c)(3) organizations (the IRS designation for public charities). Not sure if yours is? [Check online](#). The Nominate and Assess phase is the first two-thirds of your grant cycle.

Encourage your circle-mates to nominate by sending a reminder email. Direct them to the [“Find Your Passion” section of the Philanthropy Curriculum](#) if they’re having trouble finding organizations to nominate.

You can find [sample emails](#) at the end of the guide.

## STEP 5 MEETING #2: NOMINATIONS AND ASSESSMENTS

Here’s your chance to go through the nominations as a group. Each person can give a quick pitch about the organization they nominated.

Next, get ready to assess. Explain assessments to your giving circle, and have members sign-up for which organization they want to evaluate. This is a good time to revisit your circle’s values and decide if there are any guiding criteria you will use in assessing.


### SAMPLE NOMINATIONS MEETING AGENDA

*Recommended timing: Midway through the Nominate and Assess phase*

- Hellos!
- Nominations
  - » Each person gives a summary of the organization they nominated or are planning to nominate (what the organization does, why it is a rockstar organization)
- Overview of assessment process
  - » Use the “Learn & Assess” section. There’s a button under each nominated organization on the site
  - » The Evaluate Section of the Philanthropy Curriculum will guide you through evaluating organizations.

#### **How to find the assessment section**

1. Log into the site
2. Click on your circle under “My Circles”
3. Click on a nominee
4. Click on “Learn and Assess” to access the Philanthropy Curriculum and the assessment form

- » After evaluating, use the online assessment form to share your findings with the rest of your circle
- »  Assessments cannot be edited once they are submitted, so you might want to draft it offline first
- Call to action: Sign up for assessments! If you have a small circle, almost everyone in the circle may assess an organization. If you have a large group, you may want to break into a small “Working Group” that is responsible for assessing all of the organizations and reporting back to the full circle.
- Send out a list of who has agreed to assess which organization and note the deadline for assessing. Once voting starts, you can’t submit an assessment!

## STEP 6 ASSESS THE ORGANIZATIONS

We developed a rockstar guide to take you through the ins and outs of assessing organizations. The [Evaluate Section of the Philanthropy Curriculum](#) walks you through how to critically look at an organization's leadership, mission, values and financials to determine if they are worthy of your donation.

Use what you find to complete the Assessment form online. It has a few basic questions to help you organize your thoughts and share your findings with the rest of your giving circle. Everyone in the circle will be able to read the assessments.

## STEP 7 MEETING #3: VOTING

Your final meeting should occur at the beginning of the voting phase. This is a time for your group to convene, share findings and debate the merits of each organization. Pitch your favorite organization. Pull a [Frank Underwood](#) and connive your way to some votes. Just kidding. However, this is the time to get down and dirty, ask questions, and be critical of each of the nominees.

The ultimate goal is to build consensus, but this might not always happen. Make sure everyone is heard and that circle members remain respectful.

### SAMPLE AGENDA FOR DISCUSSION AND VOTING

*Recommended timing: beginning of the voting phase*

- Hellos!
- Assessment overviews
  - » Each member gives a report-back on the organization they assessed
- Debate! Talk through which organization is most deserving of your funds. Go to bat for your favorite.
- Remind everyone to vote on the site
- Optional: If your circle meets IRL (that's In Real Life), you could also use this meeting to vote in person. However, please also vote online! You can vote from your phone, so include time in the meeting to have everyone take out their phones and vote.

## STEP 8 VOTE!

Each person gets one vote – so choose wisely. You won't be able to see who voted for which organization, but you can see the percent of members who have voted and the current standings.

If your circle is meeting in person, you could use the Step 7 meeting to vote in person. However, please also vote online! You can vote from your phone, so include time in the meeting to bust out those smartphones and vote.

## STEP 9 REMIND EVERYONE TO ROCK THEIR VOTE

The site will send an automated email to everyone in your circle one week before the end of voting reminding each person to vote. But your circle would rather hear from you so we encourage you to send a personal email, too.

## STEP 10 GRANT AWARDED!

**Woohoo** – you’ve reached the grand finale of the grant cycle: your grant is awarded!

At the end of voting, you will receive an email with the results and will have the option to let us know if you’d like to award your money in a way that is different from the voting results. From there, we double check to make sure that there are no legal red flags with the organization(s) your circle selected. Then we send a check to your grantee(s)!

## STEP 11 CELEBRATE! AND DEBRIEF

Congratulations! You and your circle members are philanthropists! Way to go at awarding your first grant and making a difference. Pop some bubbly, get some celebratory cupcakes, or volunteer with your grantee.

This is the time to reflect on your accomplishment and figure out what worked and what didn’t. Does your group want to change its focus or keep it the same? Your giving circle can constantly evolve. Don’t feel stuck in what you chose way back in Steps 2 and 3. You can do this step over email or host another short meeting.

We would love to hear how your grant cycle went! Let us know if you have any feedback and how we could be more helpful.

## STEP 12 DO IT ALL AGAIN.

When you’re ready to relive your giving circle glory, nominate a new organization and get the ball rolling again.



## A FEW WORDS FROM THE WISE:

1. You're going to have circle members with different levels of engagement! Don't be discouraged by people who are less involved, and continue to try to include them. Someone who is really busy this year might become super involved next year.
2. **Meredith** is here to help! She's a giving circle extraordinaire and would be extremely excited and happy to help you facilitate your giving circle!
3. We host quarterly giving circle facilitator trainings. Meredith will be in touch with information about the next one.
4. Circle members can update or change their donation any time on the site. It's located under "Account Settings"





## RECRUITING FRIENDS TO JOIN 1:

Dear friend,

I'm thinking about creating a giving circle to focus on \_\_\_\_\_ (insert issue area) and would love for you to be a part of it!

What's a giving circle, you ask? Giving circles are groups of people who pool their resources and decide together which nonprofits to support. Together, we can make a much bigger impact than we could alone.

I know you're also really passionate about \_\_\_\_\_ and thought you would be interested in helping me tackle this important issue. I invited more of our friends from \_\_\_\_\_ and know we can make a difference together. As a group, we can narrow our focus and decide exactly how we want to address the issue of \_\_\_\_\_/address issues in our community/etc.

I'd love to chat with you more about giving circles and answer any questions you may have!

You can check out more about giving circles at [www.givingcirclesfund.org](http://www.givingcirclesfund.org).

Best,

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## RECRUITING FRIENDS TO JOIN 2:

Dear Friend,

I was thinking it would be fun to start a giving circle for \_\_\_\_\_ (group of friends). It would be a way for us to stay in touch and come together to contribute to causes and organizations that we care about. Once it was set up, people would sign on to the site to invite friends to join the circle, nominate and vote.

Once we get rolling with general interest, I will organize a call/in person meeting as a way to connect and reach agreement about some of the finer points of the circle.

Please let me know if you have any questions and check out the giving circles site:

[www.givingcirclesfund.org](http://www.givingcirclesfund.org)

Best,

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## RECRUITING FRIENDS TO JOIN 3:

Dear Friend,

I recently started a giving circle and wanted to invite you to join!

What's a giving circle, you ask? Giving circles are groups of people who pool their resources and decide together which nonprofits to support. Together, we can make a much bigger impact than we could alone.

The giving circle I started will focus on \_\_\_\_\_. I've also invited our other **friends/colleagues** to join and know we can make a big difference together. Members of the circle donate at least \$\_\_\_\_\_ a month and it's an awesome opportunity to take on leadership roles and gain experience in donating money!

Here are instructions for how to join on the site:

1. Go to **[insert circle link]**
2. Click "Join This Circle"
3. Sign up with Facebook or your email address
4. Set your donation
5. Make sure you click "join this circle" after you review your donation. **You're not done until you see the congratulations screen with stars and fireworks!**

## WELCOME TO THE GIVING CIRCLE:

Dear \_\_\_\_\_,

I just saw that you joined our giving circle! Congratulations on joining and welcome to the group. I'm so excited that you're also passionate about \_\_\_\_\_ and can't wait to give with you.

**[Nominations phase]** Right now, we're in the nominations/assessment phase of our grant cycle, so if you know of a great organization that fits our circle's mission, nominate them for a grant. You can also use the Giving Circles Fund's resources to learn about evaluating nonprofits to assess an organization that has already been nominated.

**[Voting phase]** Right now, we're in the voting phase of our grant cycle, so please feel free to review the organizations and vote on which one you think is best.

**[Between grant cycles]** Right now, we are between grant cycles. If you know of a great organization that fits our circle's mission, nominate them for a grant, or hang tight while we regroup.

Feel totally lost? Let me know and I can try to help! Also, feel free to reach out to **Meredith** at GCF with any questions or problems you have with the site.

Best,

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## REMINDER TO NOMINATE ORGANIZATIONS 1:

Dear \_\_\_\_\_,

You might have seen it on our circle site, but there are only \_\_\_\_\_ days left to nominate and assess organizations! If you know of a great nonprofit that fits our circle's mission, you should nominate them for a grant. It's ok if you aren't super familiar with the organization; we will assess it as a group.

Wondering where to find organizations to nominate?

You can use websites like [greatnonprofits.org](http://greatnonprofits.org) or [charitynavigator.org](http://charitynavigator.org) to search for nonprofits by issue or geographic region. Or, if you want to do more digging, you can check out blogs like [Huffington Post's Impact](#), the [Washington Post's On Giving](#) or [NY Times' Fixes](#) for posts about different issues and what's being done to solve them.

To nominate, log on to your circle profile at [www.givingcirclesfund.org](http://www.givingcirclesfund.org) and scroll down to where it says "nominate an organization."

Let me know if you have any questions.

## REMINDER TO NOMINATE ORGANIZATIONS 2:

Hi Everyone,

I just received an automatic reminder that the nomination period for our giving circle ends on \_\_\_\_\_.

So, if you're interested and haven't already nominated an organization for this grant cycle, please take a few minutes to do so between now and \_\_\_\_\_ to nominate an organization! At this point, we have \_\_\_\_\_ nominations.

To nominate, log on to your circle profile at [www.givingcirclesfund.org](http://www.givingcirclesfund.org) and scroll down to where it says "nominate an organization."

I'll follow up later in the month to schedule a conference call / meeting for those that want to share information or learn about the organizations that were nominated.

If you need any support with this process, [Meredith](#) at GCF is a great resource.

Thank you!

## REMINDER TO VOTE:

Dear \_\_\_\_\_,

You might have seen it on our circle site, but there are only \_\_\_\_ days left to vote in our current grant cycle! This is your opportunity to make your voice heard about where our grant money will go. We are awarding \_\_\_\_ [number of grants] grants of \_\_\_\_ [amount of grants]!

Let me know if you have any questions.

Best,

\_\_\_\_\_

## FAQS ABOUT GIVING CIRCLES

**First things first, what is a giving circle?** A giving circle is a group of people who pool their resources together to make a larger impact collectively.

**How much money do I have to give to participate?** Members of the circle donate at least \$\_\_\_\_ a month

**What is the time commitment? I'm super busy!** Our circle will have a few optional meetings throughout the year, but your level of participation is totally up to you. I understand you're probably busy, and I'd love to have you participate any way you can!

**How do you pick the organizations to support?** All grantees are nominated and vetted by circle members.

**What if I have no experience?** This is totally ok! We understand that most people haven't given before and that the process sounds a little daunting. That's why we're here to guide you through the process.

# ••••• MAKE YOUR OWN CIRCLE •••••

## WHAT IS YOUR CIRCLE'S MISSION?

*Examples: We work hard to integrate awareness about racism, feminism, and trans\*gender issues into our daily work. This Circle will look to support organizations that enable freedom and opportunity for young people through mentorship, education, and experience.*

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## WHO IS IN YOUR CIRCLE?

*(It could be friends, family, coworkers, team, just to name a few possibilities.)*

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## GIVE YOUR CIRCLE A COOL NAME

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## CIRCLE YOUR CHOICES FOR THE OPTIONS BELOW:

**Number of grant cycles per year:**    1    2    4

**Number of grants per cycle:**    1    2    3    4    5

**Public**   or   **private**

**Minimum monthly donation:** \$ \_\_\_\_\_