

# Giving Circle Essentials

A Guide for Jewish  
Giving Circles



The Jewish Giving Circle Movement

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“We make a living by what we get,  
but we make a life by what we give.”

WINSTON CHURCHILL

“*Tzedakah* (charity) is equivalent to all the  
other commandments combined.”

BABYLONIAN TALMUD, BABA BATRA 9A

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## SECTION I

# Introduction

“Just as in a coat of mail each and every scale joins the others to form one large piece of armor, so every small coin given to charity combines with the rest to form a large sum....Just as in a garment each and every thread unites with the others to form a whole garment, so every small coin given to charity unites with the rest to form a large sum.”

BABYLONIAN TALMUD, BABA BATRA 9B

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## So You Want to Start a Giving Circle. Great!



➤ As the quote that starts this section shows, even the rabbis of the Talmud realized more than a thousand years ago that giving collectively can exponentially increase the impact of your giving – on both you and the recipients of your donations.

Giving circles are a simple but powerful way to bring people together to give. They provide anyone, at any giving level, in any place, giving to any kind of cause, with a way to come together to share and leverage the group's money, skills and creativity. Your circle might be made up of your friends, colleagues, family, or neighbors – anyone who joins together to make a difference for their community or cause. A giving circle takes your mind, talents and financial abilities seriously, and makes giving a collaborative, social experience.

At Amplifier: The Jewish Giving Circle Movement, we believe that giving enriches both recipients and givers. When people think about philanthropy, giving, or *tzedakah*, they often think about the impact it has on worthy organizations and social entrepreneurs. We know that giving can also inspire, educate, engage and build community for the givers themselves.

That's what happens in giving circles. They create caring, generous communities of people who think deeply and act intentionally, thoughtfully, and strategically - together.

As someone who is creating or joining a Jewish giving circle, you are now part of an amazing movement, one that is defining a new age of philanthropy.

Welcome - we're delighted to have you with us.

## Message from Felicia Herman, Executive Director, The Natan Fund

➤ In 2004, my husband and I joined The Natan Fund, a New York-based Jewish giving circle then launching its second year of grantmaking. We joined for different reasons. He was interested in delving deeper into Jewish philanthropy, and doing that within a network of his professional peers appealed to him. For my part, although I was already working at a Jewish foundation, I wanted to learn more about the kinds of organizations that Natan supported – small, innovative, and often brand-new Jewish and Israeli organizations. We were both immediately hooked, and we’ve been at Natan ever since. (I became Executive Director in 2005, and he is a longtime member of one of Natan’s grant committees.) It was stimulating, inspiring, and fun to sit around a grantmaking table with smart people whose varied approaches, questions, and opinions enriched our own.

Natan’s mission is to inspire people to give Jewishly, which we do by engaging young (and young-ish) professionals in a giving circle that funds Jewish and Israeli social innovation. Like all giving circles, Natan has its own “flavor”: certain kinds of people coming together with certain amounts of money to fund certain kinds of things. The beauty of the giving circle model, however, is that *anyone can do it*, with *any* group of people, at *any* level of giving, focused on any kind of causes or organizations. What makes Natan successful with its members is exactly what makes other giving circles successful with theirs – the opportunity to leverage one’s money, time and energy with that of others, and to engage in a transparent, hands-on giving process that educates, inspires, and reflects your values.



After over a decade, Natan has decided to expand its own impact by creating Amplifier: The Jewish Giving Circle Movement to encourage *other* people to start the giving circles that work best for them, and to build a network that can sustain and strengthen this growing field. We’ve partnered with our friends and colleagues at the Charles and Lynn Schusterman Foundation and with dozens of organizations across the Jewish philanthropic landscape to build Amplifier in a truly collaborative fashion. We’re all working to build the resources and infrastructure to make starting and operating a giving circle as efficient and effective as possible.

On behalf of all of us at Amplifier and Natan, let me say how excited we are that you have picked up *Giving Circle Essentials* and want to create or strengthen your own giving circle. After a decade of being part of a giving circle, I can tell you that it will change your life. You will build a community of fellow travelers who care about making the world a better place; explore your own personal values and priorities around giving; and be inspired by countless people who are devoting their lives to making change in their communities. You will learn more than you ever thought possible, and you’ll have a tremendous amount of fun while doing it. Good luck, and be in touch with us at [Hello@AmplifierGiving.org](mailto:Hello@AmplifierGiving.org) if there is anything we can do to help you!

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## About Amplifier: The Jewish Giving Circle Movement



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➤ Amplifier is a global network of giving circles motivated by Jewish values and inspired by changemakers around the world. We catalyze, connect and counsel Jewish giving circles through hands-on guidance and a growing suite of tools:

1

*Giving Circle Essentials* is part of an ever-expanding Resource Library that provides everything you need to know to start, operate, and sustain a Jewish giving circle.

3

We connect giving circles to volunteer coaches and/or professional facilitators - giving circle experts who can guide circles as they grow and develop.

2

Our web platform ([www.AmplifierGiving.org](http://www.AmplifierGiving.org)) helps circles manage essential grantmaking and administrative functions and connect to other circles. The site hosts a Giving Circle Directory, Organizational Directory, and Common Grant Applications from nonprofit organizations around the world that all giving circles registered on the platform can access.

4

We host regional and national convenings, in-person trainings and webinars where giving circle leaders can network with and learn both from each other and from philanthropic and issue-specific experts.

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## Acknowledgements

➤ *Giving Circle Essentials'* general editor is Felicia Herman, with substantive and invaluable contributions by Elaine Gast Fawcett, Jacob Appel, and Aviva Stampfer. We are also indebted to many colleagues and giving circle incubator members who reviewed earlier versions of this document: Nancy Astor Fox, Lily Goodman, Sarah Indyk, Morlie Levin, Kate Rosenberg, Ruthie Rotenberg, Sari L. Raskin, Siggy Robinson, Julie R. Sissman, and Etay Zwick.



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SECTION II

# About Giving Circles

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## What is a Giving Circle?

> A giving circle is a group of people who pool their charitable donations and decide together where to allocate their money. A *Jewish* giving circle focuses on giving to Jewish and/or Israeli causes, and/or on giving that is explicitly inspired by Jewish values.

That's all there is to it!

## Benefits of Giving Circles

> Giving circles are a powerful way for small groups to make big change: to give together proactively and strategically, to build community with each other, and to connect to excellent potential grant recipients who are changing the world in a variety of ways. Recent research<sup>4</sup> has shown that giving circle members give more money, give more strategically, and engage more deeply in their communities than non-giving circle members. They are also more likely to tell other people about the organizations their giving circle supports (rather than their own personal charitable donations) – thereby creating ripple effects that go far beyond the circle itself. Giving circles are:



### ACCESSIBLE

Anyone at any giving level, at any age, in any place, with any funding interest, can start a giving circle. There's no minimum contribution level, and no barriers to entry.



### COLLABORATIVE

Members make decisions together in a democratic process, as equals and peers.



### EMPOWERING

Members leverage their dollars to do something bigger – and perhaps better – than they could on their own.



### EDUCATIONAL

Members learn about the needs of their community or focus area, and can be intentional and proactive about how they give to the causes they care about.



### HANDS-ON

In addition to active engagement with philanthropic decision-making, some giving circles also offer members a chance to volunteer with or provide *pro bono* professional assistance to grantees.



### COMMUNAL

Members connect with each other and with their communities, building meaningful relationships with each other and with those they are supporting.



### FUN!

Giving circles bring people together to accomplish some serious good in a joyful way. It's a social experience: In addition to giving together, members often share food, share stories, and share their lives together in meaningful ways.

<sup>4</sup> Angela Eikenberry and Jessica Bearman, "The Impact of Giving Together: Giving Circles' Influence on Members' Philanthropic and Civic Behaviors, Knowledge and Attitudes," Forum of Regional Associations of Grantmakers, 2009. Available online at: [http://www.philanthropy.iupui.edu/files/research/2009givingcircles\\_fullreport.pdf](http://www.philanthropy.iupui.edu/files/research/2009givingcircles_fullreport.pdf)

## Jewish Giving Circles

➤ Because we care about Jewish philanthropy, *Giving Circle Essentials* has some content that's specific to Jewish giving circles. While most of the material here is universal and would be useful to anyone who hopes to start a giving circle, the Jewish piece is important to us, and we want to share why.

First, we believe that Judaism, Jewish texts, and Jewish culture and experiences offer profound and meaningful ideas for shaping a life rich with meaning, with a strong emphasis on making the world a better place *right now*, through your everyday actions. It doesn't matter to us how you practice, if you practice, or what you believe – you don't even have to be Jewish! Our goal is just to ensure that everyone who wants to bring Jewish wisdom into their lives feels empowered to do so in ways that are meaningful to them. The Jewish conversation began thousands of years ago, and it continues to this day as new voices (including yours) ask new questions, raise new issues, and create new interpretations of ancient values and precepts.

We also believe that Jewish wisdom around charitable giving is particularly important and inspirational. Take, for example, the very words that Jews use to talk about giving. The Hebrew word *tzedakah* has a very different connotation than the English notion of “charity.” Where charity refers to voluntary acts of kindness, benevolence, and generosity, *tzedakah* is related to the Hebrew words for righteousness and justice, and Jewish tradition considers it obligatory.

We also believe that Jewish wisdom around charitable giving is particularly important and inspirational.

*Tzedakah* is so essential to human existence that even the poor are required to give, because everyone has a role to play in creating a just world. (Amplifier's resource library offers a wealth of resources for learning more about Jewish values around giving, developed both by Amplifier and by our many partners in the Jewish philanthropic sector.)

For us, a Jewish giving circle is simply one that is explicitly and seriously inspired by Jewish values, whether or not it gives to Jewish initiatives.

Another of Amplifier's goals is to introduce people to the exhilarating, diverse, and ever-growing universe of creative and effective Jewish organizations and social entrepreneurs. It used to be the case that “Jewish giving” typically meant giving to synagogues, Federations, and Israel. These are good things to support. But we are also living in the midst of a true renaissance of Jewish life around the world: that most givers still know little about, we now have Jewish organizations working with arts and culture, environmental sustainability, new forms of spirituality, groundbreaking learning initiatives, cutting-edge new media, social justice, and the list goes on. We think Jewish giving circles can be a great way to connect givers to the wealth of excellent Jewish projects around the world.

More on Next Page ➔

## JEWISH GIVING CIRCLES // CONTINUED

Finally, we believe in Jewish giving circles because getting together to give is a great way to experience what being in a Jewish community *of your own making* is all about. We believe that individuals should be empowered to create their own communities; to be inspired by real and substantive learning; to discover the many needs in the world and to mesh that with what they care most about. Amplifier's focus on empowering grassroots communities to make their own Jewish experiences parallels many other trends in the 21st century Jewish community. What independent *minyans* and *chavurot* have done for Jewish religious life; what Moishe House does for creating grassroots living communities; and what Kevah is doing for Jewish learning, giving circles can do for Jewish giving. Giving circles are a great way to *create your own Jewish community* – whatever that means to you – and to connect it to Jewish communities throughout time and around the world.

<sup>1</sup> Learn more about independent minyans, [Moishe House](#), and [Kevah](#).

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## Things to Look Out For

➤ Although no two giving circles are the same, they share some common challenges. As you start your giving circle, consider these important tips:

1

### Recruit people who are fans of group decision-making.

Not everything each member likes will get funded, and not everything that gets funded will have unanimous or universal support. Members need to trust the group and its process and know they may not get their way 100% of the time. They should be happy (or at least willing) to engage in the give-and-take and compromise that comes with being part of a team.

2

### Stay on the lookout for new members.

Your group's membership can turn over: people move, priorities change, life intervenes. Both leaders and members should always be thinking about recruiting new members, as well as creating an open culture of dialogue within the group that can keep current members engaged and happy.

3

### Giving circles take time.

Time for planning, meeting, reviewing applications and voting. Some giving circles will add more time for site visits, events, networking, and celebrating. Make sure everyone is aware of the time commitment and agrees to do their best to show up consistently.

4

### There's a cost of doing business.

Like any organization, as your giving circle grows, so will its costs. Bigger events lead to a need for more food, and thus to higher expenses. Or maybe you want a website, or to hire staff. Even if your circle starts off small and members share or trade responsibility for expenses, keep in mind that you may one day need to raise money (from members or others) not only to make grants, but also to operate your circle.

5

### Be realistic, stay humble, and respect everyone's time.

Manage expectations about what your circle can accomplish, given the amount of money and time everyone is contributing. Respect your members' time, as well as that of your grant applicants and recipients. Shape what you ask of members to meet their expectations and goals, and right-size what you ask of grant applicants for what you are potentially giving them.

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SECTION III

# What Kind of Giving Circle Are You Creating?

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## Introduction

➤ Giving circles are truly a choose-your-own-adventure: they come in all shapes and sizes, and there's no single way to run one. Some giving circles prefer to keep it simple, creating a low-key member experience and staying nimble in their giving. Others operate more like small foundations, setting out strategic outcomes for their grants, creating rigorous decision-making processes, and measuring the impact of the grants on recipient organizations. And then there's everything in between!

Amplifier designed *Giving Circle Essentials* for people who want to start a giving circle or strengthen one that already exists. Our goal is to provide inspiration as you create and grow an intentional, meaningful, and effective giving circle. No matter what type of circle

it is, we want to offer some advice, tools, and common practices you might consider adopting, and highlight some pitfalls to avoid. We don't tell you where to give – that's up to you.

You'll see that we consciously use the language of philanthropy throughout this and other Amplifier materials. No matter how much you give, we want to encourage you to think about yourself as a philanthropist: someone who uses his or her resources to improve the human condition. Even small donations, made with intent and thoughtfulness, can make big change. We just want you to think big, to aspire to use your giving to change the world.



## What Kind of Circle Are You Creating?

➤ The more thinking you can do at the outset about what kind of giving circle you're creating, the easier it will be to navigate through *Giving Circle Essentials* to the pieces that are most relevant to your circle.

As your giving circle develops, "form follows function" should be your mantra. You'll design your circle around your intended purpose and goals – what your members want to get out of the experience, what they bring to it, and what you all hope to achieve with your giving.

We've given you two ways to think some of this through: a checklist and by the number of meetings you want to hold.

## One Way to Decide: A Checklist

Tally your answers below.



No. of As



No. of Bs



No. of Cs

1

What kind of member experience do you want to create?

- A. Your main goal is to get a group of people together to do some good, learn about an issue or about innovative organizations, build a community of your friends/peers, and have some fun in the process. You prefer keeping the experience low-key and low-intensity (especially in terms of time commitment).
- B. You prefer some level of structure to keep things running smoothly. You may want to invite experts to educate members about philanthropy or issue areas; you want members to take substantive steps in their giving journey. You expect that members will approach this experience relatively seriously in terms of their time commitment and depth of engagement in the grantmaking process.
- C. You need systems, structure, policies and a governing board to manage the circle and meet your goals. You may need a number of committees to get all the work done, and you want to complement your giving with events through the year. Members are extremely serious about the grantmaking, and their experience is analogous to sitting on the board of a grantmaking foundation. You might need professional staff.



To help you think about the kind of giving circle you want to create, and to help you navigate *Giving Circle Essentials* accordingly, we've devised a checklist that can help you place your circle into one of three big, broad categories. These are general guidelines; you should feel free to pick and choose among them, and to change your answers over time as your experience grows and your members' interests and giving priorities evolve.

2

Which best describes your goals regarding grantmaking?

- A. You want to support some causes and organizations that you care about.
- B. You want to support specific issue areas in a proactive way.
- C. You want to create change across a system, group or demographic.

3

What size feels right for your circle, given what you want to accomplish?

- A. 20 members or less
- B. 20-50 members
- C. 50 or more members

4

What will you ask members to contribute in terms of dollars?

- A. \$180-\$1,800 (or less) a year
- B. \$1,800-\$5,000 a year
- C. \$5,000 or more a year

5

What geographic reach will you aim for in your grantmaking?

- A. Local only
- B. City, county or statewide
- C. National or international

6

Which of these sounds closest to the grantmaking process you envision for your circle?

- A. An informal, simple grant process (potentially using the Common Grant Applications on the Amplifier site or the descriptions in Amplifier's Organizational Directory) that doesn't ask much from grant applicants and is intended as a fairly low-intensity experience for members
- B. More attention paid to the grant process (potentially using the Common Grant Applications on the Amplifier site or the Descriptions in Amplifier's Organizational Directory), with some due diligence on the potential grant recipients, and perhaps the opportunity to connect personally with grant applicants
- C. Substantial time spent on forming the group and understanding members' values, interests, and the group's mission; a more rigorous grant decision-making process (potentially adding custom questions to the Common Grant Applications on the Amplifier site, using the descriptions in Amplifier's Organizational Directory, or issuing a Grant Opportunity to solicit new applications to the platform)

See Results on Next Page →



## If you chose...

### MOSTLY A'S

## Loose Network

Look for sections marked with ●

“Loose networks typically consist of a core group of people who do the ongoing organizing, planning and grant decision-making for the group and then individuals, who may or may not be considered members, branch off from that group, often participating intermittently. ‘Members’ tend to gather around a specific event like a potluck dinner or other fundraiser. Individual participants can make funding recommendations but typically do not make funding decisions. There is little or no staff support within these groups. Rather, loose networks are characterized by their flexibility, organic nature, low cost to operate and lack of bureaucracy. There is typically no minimum fee to participate and decision-making often occurs in an ad hoc fashion in response to the needs of individuals. The activities of these groups are primarily social, with less emphasis put on educating members about the community. Many see their participation in the group as an alternative to volunteering.”

### MOSTLY B'S

## Small Group

Look for sections marked with ●

“Small groups consist of a small number of people who pool their resources and then decide together where to give these away. The amount of funds pooled by each member tends to be in equal amounts ranging from \$50 to \$5,000, though there are several small groups where the amount paid into the fund is left to the discretion of the individual. Because the group is small, leadership is often shared and all are able to participate in the decision-making process. About half of small group giving circles use a consensus decision-making process. The two major foci of small group giving circles seem to be social and educational activities, with the social aspects often taking precedence. The social aspect is emphasized through informal group interaction and discussions. The educational aspect is also relatively informal, taking place through the grant making process, site visits, meetings with nonprofit staff, and information sharing among group members. Several small groups have some staff support to help with administration or fiscal management.”

### MOSTLY C'S

## Formal Organization

Look for sections marked with ●

“Formal organizations are more formal in their structure and decision-making processes, looking very much like a traditional membership organization structure with a board or lead group at the top, committees, members, and frequently professional staff support. They are also larger in size of membership than other giving circles and the cost to participate tends to be high compared to small groups and loose networks; the modal amount being \$5,000 and \$5,500. The grant decision-making process typically involves committees or investment teams making grant decisions directly or making recommendations for a full membership vote. The major activities of formal organizations are education and engagement. Most formal organizations have some kind of educational programming in addition to grantmaking and other informal educational opportunities. There is also a strong emphasis on direct engagement with nonprofit organizations. About half of formal organizations provide opportunities for members to volunteer with nonprofit organizations. In most cases, members volunteer their expertise at the administrative level rather than through direct service.”

<sup>2</sup> Giving charitable donations in multiples of 18 is a fun and subtle way to harken back to Jewish values. In Hebrew, every letter also has a numerical value. The numerical value for the word *chai*, life, is 18 - and thus to give in multiples of 18, the tradition goes, blesses the recipient with a good long life, and expresses the hope that the giver will also be blessed with life and prosperity.

<sup>3</sup> Angela Eikenberry and Jessica Bearman, “The Impact of Giving Together: Giving Circles’ Influence on Members’ Philanthropic and Civic Behaviors, Knowledge and Attitudes,” Forum of Regional Associations of Grantmakers, 2009. Available online at: [http://www.philanthropy.iupui.edu/files/research/2009givingcircles\\_fullreport.pdf](http://www.philanthropy.iupui.edu/files/research/2009givingcircles_fullreport.pdf)

## Another Way to Decide: How Many Meetings Do You Want to Have?

I WOULD LIKE TO HOLD

### 1 Meeting

Look for sections marked with ●

➤ Your circle can decide ahead of time how many meetings it wants to hold – from the first time you get together to celebrating the grant decisions – and work backwards from there. Just keep in mind that once you get started, you might decide that you need more. And that’s a good thing! Amplifier’s *Giving Circle Essentials* and the *Giving Circle Building Blocks* offer step-by-step instructions for leading conversations about all the steps of circle-forming (Values, Mission, Vision and Focus Areas) referenced below.

Use the *Giving Circle Express* for a concentrated version of the entire giving circle experience in one night. This is more a “taste” than a substantive giving experience, but if you’re not quite convinced about the giving circle model, it’s a fun and extremely low-commitment way to try it out.

I WOULD LIKE TO HOLD

### 3 Meetings

Look for sections marked with ●

#### OPTION ONE: 2 Circle-Forming Meetings and 1 Grant Review Meeting

1: Members get to know each other, discuss circle logistics, decide on the circle’s Values.

2: Members decide on the circle’s Mission, Vision and Focus Areas.

*Homework:* Members browse Amplifier’s Common Grant Applicants and nominate organizations for consideration by their circle; they may also conduct additional due diligence using publicly-available information (websites, IRS Form 990s).

3: Discuss applications/nominations, make grant decisions & celebrate!

#### OPTION TWO: 1 Circle-Forming Meeting and 2 Grant Review Meetings

1: Members get to know each other, discuss circle logistics, Values, Mission, Vision, Focus Areas.

*Homework:* Members browse the Common Grant Applications for potential grant recipients and nominate organizations for consideration by their circle; may also conduct additional due diligence using publicly-available information (websites, IRS Form 990s).

2: The circle narrows the nominees down to a handful of finalists.

*Homework:* Members meet/interview the applicants or conduct other due diligence, possibly even site visits.

3: Finalists present to the group – or members present on behalf of finalists they are most closely connected to at this point. Make grant decisions & celebrate!

I WOULD LIKE TO HOLD

### 6 Meetings

Look for sections marked with ●

#### OPTION ONE: Using existing applications on the platform (potentially with additional custom questions)

1: Members get to know each other, discuss circle logistics.

2: Decide on Values.

3: Develop Mission, Vision and Focus Areas.

4: Grantmaking process discussion. The circle walks through the Amplifier platform

More on Next Page ➔

## ANOTHER WAY TO DECIDE // CONTINUED

together and makes decisions about whether to use existing applications and nominations, or to add custom questions and invite organizations to submit answers. If the circle decides to ask custom questions, the circle decides on those questions.

*Homework:* If there are no custom questions: members search the Amplifier platform for potential grant recipients and nominate organizations; do any additional due diligence. If there are custom questions: circle leader/administrator creates a Grant Opportunity with specific additional questions with a deadline, and the circle waits for responses and then reviews them.

**5:** Discuss the first round of potential grant recipients; whittle down the list and select finalists.

*Homework:* Members or circle leader/administrator conducts additional due diligence (site visits; more research; talk to leadership, other funders).

**6:** Finalists present to the group – or members present on behalf of specific finalists they are most closely connected to at this point. Make grant decisions & celebrate!

**OPTION TWO:** Essentially a Request for Proposals process, where a circle solicits new applications to the platform through a Grant Opportunity and issues custom questions to organizations with existing Common Grant Applications on the platform

**1:** Members get to know each other, discuss circle logistics.

**2:** Decide on Values.

**3:** Develop Mission, Vision and Focus Areas.

**4:** Circle leader or members use the Amplifier platform to craft custom questions and discuss how to reach out to organizations they don't yet know of. What are the best avenues for dissemination of the circle's Grant Opportunity?

*Homework:* Circle leader/administrator creates the Grant Opportunity and custom questions, with deadline for submissions, and disseminates it through the Amplifier platform. All members help spread the word through their own networks. Once all applications have been received, leader/administrator may conduct a cursory review to determine eligibility. All members then review the eligible responses.

**5:** Discuss the initial submissions and select finalists.

*Homework:* Members conduct additional due diligence (site visits, more research, talk to organizational leadership).

**6:** Finalists present to the group – or members represent for specific finalists they are most closely connected to at this point. Make grant decisions & celebrate!

## I WOULD LIKE TO

## Add More Meetings

Be in touch with us! Additional meetings could include educational events, multi-stage grant application processes, collaboration with other circles, site visits...the sky is the limit.

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SECTION IV

# Starting Your Giving Circle

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## Before You Begin

➤ As a giving circle founder, you may want to set a few parameters in advance before you recruit other members. Think through these *Giving Circle Startup Questions* (also available as a [standalone document](#)) and decide what you can answer now versus what you want the group to decide together.

### PARAMETER 1

## Membership

- ➔ Who will you invite to join the giving circle? Who will recruit them, and how?
- ➔ What's the minimum viable number for launching the group, and what's your ideal maximum size? (We suggest 5-20 for a startup giving circle, but it really comes down to what you hope to achieve, what your financial goals are, and how many different voices you can successfully include.)
- ➔ What will members be expected to contribute: money, time, professional expertise, leadership? How much of each?

### PARAMETER 2

## Logistics

- ➔ Where will you convene for your first meeting? How often and where do you plan to convene the group after that?
- ➔ What time of day and week is best for the people whom you want to recruit, and how long should the meetings last?
- ➔ Will you only get together for grantmaking, or will you also hold events (speakers/educational events, social events, community service)?
- ➔ Can you make the arduous task of coordinating calendars easier? ([MeetingWizard](#) and [Doodle](#) are two great group scheduling tools.)
- ➔ Who is in charge of bringing snacks and any materials you may need to the first meeting?
- ➔ How will decisions be made? Consensus? Voting? See [Making Decisions: Some Approaches](#) for a few basic decision-making options.
- ➔ Who will facilitate the meetings – or at least the first one? If it's a circle member, how will their opinions be included in the group's decisions fairly?

More on Next Page ➔

BEFORE YOU BEGIN // CONTINUED

## PARAMETER 3

## Financial Logistics

- How much money will each member give? Will you have one giving level for everyone or tiered giving (based on ability or desire)? Who will know how much others give – is this public information, or does only the leader(s) know?
- Where will the group’s grantmaking money be housed? Will your members want their contributions to be tax-deductible? Will members make contributions to the giving circle, which will then distribute the money to grant recipients; or will members write individual checks to the grant recipients?
- How will the circle cover its administrative expenses (e.g. food for meetings, materials, even staff)? If you anticipate significant expenses that members will want to cover with tax-deductible contributions, will you seek out a fiscal sponsor or host organization? See [Collecting & Handling Money](#), below, and [Donor-Advised Funds and Fiscal Sponsors](#) for more information.

## PARAMETER 4

## Grants

- Do you already know what you want the group to give to? *Giving Circle Essentials* and our [Giving Circle Building Blocks](#) can offer suggestions for eliciting the group’s philanthropic values and priorities. If you are starting a circle already focused on a specific cause/issue, geographic location, or even a particular institution, you should articulate that to potential members as you recruit them.
  - Do you plan to make frequent grants based on publicly-available information? Or are you interested in a more in-depth review process that includes grant applications and due diligence – and that will extend over a few meetings? (In either case, Amplifier’s Organizational Directory and Common Grant Applications can help you learn more about potential grant recipients.)
- Do your members have something other than money that they can
- contribute to the grantees, such as professional skills, volunteer time, or connections to other funding sources? If so, how will you “account” for these contributions? Will they come alongside financial contributions or in lieu of them? How will you ensure that the grantees want and need what you have to offer? See the [Map Your Assets: The 3Ts / 3Ws](#) for more information.

## Recruiting Members



### TIP

Use our [Sample Giving Circle Recruitment Letter](#) as a template when recruiting new members, and our [Giving Circles FAQ](#) to answer questions from prospective members. You may also want to reach out to some (or all) with personal phone calls.

➤ Chances are you are starting your giving circle alone or with a few friends or colleagues. Most giving circles grow by word of mouth, and yours may, too. In the beginning, you will likely invite others whom you know and think would be interested. Just by looking at your network alone, you might be able to engage enough people to create a robust startup circle. We recommend a minimum of 5-15 members to get it off the ground.

You may find over time that you want to expand beyond your own network into members' networks, different demographic or professional groups, etc. It helps to come up with some thoughtful criteria for the types of people you want to join. Form follows function: Who would be the best kinds of people to help you meet the needs of your circle, including *both* your grantmaking objectives and your goals for creating a strong and robust member community?

The donation amount you set in advance will also naturally attract or deter some people. So too will the giving focus you determine. Think about whether you're willing to adapt those (and other criteria) to meet the needs and interests of new members. Some giving circles are like amoebas that are continually reshaping around new members' interests, while keeping core values consistent over time; others are much more set in terms of focus, and new members opt in (or not) depending on how much their interests align with that focus. Some of the criteria you might think about when recruiting are:

### Stage of Life

Do you want individuals only, couples, families including children? (Will the children play a role? At what age?)

### Focus Area Experts

Some circles intentionally create diverse groups of people, with some members contributing financial capital and others contributing professional or subject-specific knowledge related to the issues the group wants to fund.

### Specific Demographics

Will you have age, gender, geographic, professional criteria? Will your circle include Jews and non-Jews? Some groups like to stay relatively homogeneous; others embrace diversity. There's no right answer, so ask yourself again: What are you trying to achieve with and for the community of people that joins your circle?

### More than Money

Some people have social capital and bring you access to networks you want to be connected to; some have particular professional skills your group or your grantees need; others may be high-profile leaders who will attract other members; some might be willing to assume the responsibility of administering the circle itself. Remember there are many ways that members can add value to the group beyond financial contributions. (See the [Map Your Assets: The 3Ts / 3Ws](#) for more information.)

More on Next Page ➔

## RECRUITING MEMBERS // CONTINUED

Giving circles range in size. Some keep membership to less than 20 members, while others grow their circle over time to 50, 100 or more. It's difficult to get solid, participatory decision-making done with more than 15 or 20 people at a table, so many circles larger than that divide members into different committees.

Recruiting more members often results in more money to give away, but bigger doesn't necessarily mean better. A bigger giving circle (more than 20 members, say) may require more structure (multiple committees, more elaborate reviewing and voting procedures, a governing board), more operational costs, and maybe even paid staff. Again, form follows function: think carefully about what kind of community you want to create and about the strengths and weaknesses of growing your membership.

The most successful giving circles provide multiple kinds of value to members.

Be prepared to share with potential members a brief description of what a giving circle is, information about your giving circle specifically and what you hope to achieve, and answers to their most important questions, which likely are:

- How much, and how often, will I have to give?
- How much time is involved (per month, per grant cycle or per year)?
- How long a period of involvement will I need to commit to?
- What will I learn or gain from joining? (This could include learning about the community or a particular issue area, gaining philanthropy experience, expanding social or professional networks, etc.)

The most successful giving circles provide multiple kinds of value to members: the ability to do good in the world; to learn new things; connect with people they want to be with; provide access to experts, leaders, and local philanthropists; and more. The more value you can envision and articulate, the easier recruiting will be.



## Collecting & Handling Money

➤ Something you'll want your circle to discuss as soon as possible is money, since it's what makes the "giving" part of your circle possible. There are giving circles that require as little as \$10 a month, and others where people give over \$100,000 a year. Research shows that most giving circle members in the U.S. give about \$1,000 per year; the average member contribution across all of the giving circles surveyed a few years ago was \$2,800.

In addition to the dollar amount of donation, there are other questions to consider:

- ➔ Does everyone give the same amount, or are there tiered levels of giving?
- ➔ Do members give once annually, or at set times throughout the year?
- ➔ Must members give their own money, or can they raise it from other sources?
- ➔ Can members contribute together with another person (e.g., spouse or family member) and share a vote – or contribute double the amount and have two votes?
- ➔ Will giving be anonymous among circle members? Who will know who is giving what?
- ➔ Will a portion of each donation go toward funding the operations of the giving circle (events, food, supplies, financial institution fees, even staff)? Or, if you have operating expenses, will you ask members to contribute above and beyond the base donation as an administrative fee?
- ➔ Is there the possibility that another institution, such as a foundation, community foundation, or even a corporation, might offer matching gifts to match member donations and expand the grant budget?


More on Next Page ➔

<sup>5</sup> Jessica E. Bearman, "More Giving Together: The Growth and Impact of Giving Circles and Shared Giving," Forum of Regional Associations of Grantmakers, 2007.

COLLECTING & HANDLING MONEY  
// CONTINUED

Once you’ve decided how much money you will collect, you need to figure out where to keep it. There are many ways that giving circles hold and distribute their money. Depending on the country where your circle is located and/or makes grants, there will be different legal, tax, and financial implications for different structures. Here are the most common choices, from the simplest to most complex, primarily relevant for American circles - and see [Where Should We Keep our Money?](#) for more information.

- One member is in charge of collecting cash or checks, and then writes a group check to the grantees. This is simplest from an administrative perspective, but only the member writing the check will be eligible for a charitable tax deduction.
- Each member writes individual checks directly to grantees after making grant decisions. You’ll just need to ensure that everyone actually writes and sends their checks.
- The circle opens a “collective giving” account at a donor-advised fund. A “collective giving” account is just like a bank account, but contributions into it are tax-deductible and account funds may be disbursed only to registered charities. Each member contributes into the account and thus all members receive the charitable tax deduction. The group gives the money away when it’s ready. Donor-advised funds typically charge a fee, so your circle will have to decide how it will pay that fee.
- In addition to (or beyond) a donor-advised fund, you may also decide that your administrative expenses are significant enough for you to find an organization to act as a fiscal sponsor for the giving circle. Fiscal sponsorship is a formal arrangement in which a 501(c)(3) organization sponsors a project (in this case a giving circle) that doesn’t have tax-exempt status so that all contributions to the project – even those intended to pay administrative expenses – are tax-deductible for the donors. Often for a fee the fiscal sponsor handles the finances – housing the money, writing checks to staff and vendors, managing the bookkeeping, and tax and legal reporting.

**TIP**

Some giving circles share operating expenses (such as food for meetings) across the membership in an informal, as-needed way; other giving circles raise operational expenses from their boards or from outside sources; and some have administrative “hosts” that cover these costs.

If you expect to have many of the following types of expenses, you should consider getting a fiscal sponsor:

							
Bank, credit card, financial institution fees	Office supplies and related expenses	Print and PR materials, letterhead and business cards	Catering and venue rentals for meetings and/or events	Speakers' fees and travel expenses for events	Travel fees for grantee site visits and conferences	Website development, hosting, and maintenance	Staff and/or administrative support salaries

## Establishing Committees

// OPTIONAL



➤ The more you grow your giving circle in size, the more structure you will need. It takes a certain amount of volunteer (or paid staff) time to make sure the work of the giving circle is getting done. There are many ways to divide the responsibilities.

- Small giving circles may choose to distribute the workload across the membership without committees. This kind of structure can create unity and focus, yet requires effective leadership and commitment from every member. In some smaller circles, a member might even volunteer to handle the administrative responsibilities in lieu of a financial contribution.
- Larger, more formal giving circles often create committees, typically for:
  - ➔ Grants (sometimes separate committees for different grant areas)
  - ➔ Membership (including both recruitment and retention)
  - ➔ Education/events (programming for members, such as speakers, workshops)
  - ➔ Communication/marketing (internal and external)
  - ➔ Governing board

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## SECTION V

# Values, Mission & Vision

“To give away money is an easy matter, and in any man’s power.  
But to decide to whom to give it, and how large and when, and for what  
purpose and how, is neither in every man’s power – nor an easy matter”

ARISTOTLE

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## Introduction

➤ Deciding how to give money away effectively is challenging, but it also tremendously rewarding. Articulating your circle's values, its vision for a world affected by its giving, and the ways in which it hopes to support the creation of that world, can serve as a kind of compass to guide your circle's actions. Once your circle begins its grantmaking, you will be faced with many great ideas and organizations to support. The more you can narrow in on your vision and goals now, the easier it will be to make final decisions.

Amplifier's *Giving Circle Building Blocks* provides step-by-step instructions and exercises for facilitating conversations about your group's values, mission, and vision. *Mission, Vision and Values: Worksheet and Samples* provides examples drawn from Jewish and non-Jewish foundations, Federations and giving circles.

## Starting a Values Conversation

➤ Values are the core principles that guide your circle. Ideally, the members in your giving circle will share a common bond based on values. The trick is finding a way to express those common values so that everyone feels connected as a group. Whether those values focus on the Jewish values of *tzedakah* or *tikkum olam*, or on principles like inclusiveness, equality and respect, articulating your values together helps create your group's identity and culture, forming the grounding upon which all of your decision-making can rest.



### TIP

To help facilitate the values conversation among giving circle members, consider using one of the tools that philanthropic advisory services have created for this purpose. Instructions for using each are in our *Giving Circle Building Blocks*.

#### 21/64'S MOTIVATIONAL VALUES CARDS

Each card has a written value (Justice, Compassion, etc.) that drives a personal and philanthropic decision.

#### 21/64'S PICTURE YOUR LEGACY

This card deck has 52 colorful images designed to spark discussion on philanthropic identity and aspirations.

ROSE COMMUNITY FOUNDATION'S JEWISH PHILANTHROPIC VALUES CARDS  
Features 18 values related to giving that are drawn from Jewish texts.



## Giving Jewishly

➤ “Jewish giving” can have a variety of meanings:

- 1: Using Jewish values to inspire giving of any kind.
- 2: Supporting primarily Jewish and/or Israeli causes that serve all people.
- 3: Supporting primarily Jewish and/or Israeli causes that primarily support Jews and/or Israelis.

Many of Judaism’s values and teachings about giving have become core to the way that Western society understands giving, and can provide inspiration for anyone wanting to give thoughtfully. You don’t even have to be Jewish!

Regardless of where your circle lies on the Jewish spectrum, your values inform the spirit of your work and will be what keeps you and the other members inspired over time. Here are some examples of the ways different Jewish giving circles define “Jewish giving”:

- ➔ *HEKDESH, the giving group of alumni of the Dorot Fellowship in Israel, is a “philanthropy collective that inspires members to be increasingly intentional and generous with their charitable donations by exploring the traditions and practice of tzedakah.... [and] organizes unique learning opportunities...to deepen people’s commitment to tzedakah...”*
- ➔ *Natan’s mission is to transform the Jewish world through funding Jewish and Israeli social innovation, and thus it gives almost exclusively to Jewish and Israeli nonprofit organizations that have Jews or Israelis (of all religions) as the “end users” of the organizations’ services.*
- ➔ *The Rose Community Foundation’s Rose Youth Foundation and Roots and Branches Foundation must make grants that are “primarily Jewish,” the definition of which they decide for themselves after studying Jewish texts on giving. For example, one year, one of RCF’s groups decided to fund anti-sex trafficking organizations because they were inspired by the Jewish value of pidyon sh’vuyim – redeeming the captive. In other years, they have supported programs for refugees in their city, inspired by ahavat ger, to love the foreigner as yourself, because Jews themselves were foreigners in the land of Egypt.*



### LEARN MORE

See [Selected Jewish Texts on Giving](#).

Rose Community Foundation’s Jewish Philanthropic Values Cards feature 18 values relating to giving that are drawn from Jewish tradition. The [Giving Circle Building Blocks](#) includes an abbreviated version of an exercise for using the cards, or you can access [the full exercise](#) from the Rose Community Foundation in Amplifier’s Resource Library.



## Creating Mission and Vision Statements

➤ Giving circles offer a wonderful opportunity for individuals to decide together the good they want to bring into the world. They serve the giving circle members themselves, who have the benefit of learning, growing and collaborating; and they serve the community – the beneficiaries of the giving circle’s support.

Articulating a vision and a mission are important for a circle’s self-understanding and its ability to explain to others – especially grant applicants and prospective members – what it is trying to accomplish in the world, with its grants and/or its members.

### Vision

Vision describes what you aspire to for the future – what a better world will look like if your circle is successful, whether for your members, your grant recipients, or the issues and populations the grants address.

### Mission

Mission describes your purpose – what you do and how you do it (e.g. a “to” statement - “our mission is to promote Jewish educational excellence and affordability”; “our mission is to inspire young professionals to give guided by Jewish values”).

Try to strike a balance between being too narrow and too broad.

Some groups craft generic, broad mission statements so as to be able to support a wide variety of organizations and causes – but this can make it hard to compare potential grant recipients and to make final decisions. Others narrow their focus to be able to develop expertise in a particular area and to make a deeper impact in that area – but this can lead to fewer funding options and will limit the number of people interested in becoming members of the circle. Try to strike a balance between being too narrow (“we will fund chemistry labs for 12 year olds in Atlanta public schools”) and too broad (“we want to improve education for girls in Israel”).



#### TIP

It can help to have someone facilitate these conversations – perhaps someone outside the giving circle membership who can bring objectivity to the process. If you don’t have an outside facilitator, designate someone within your group to serve as facilitator, and check out [Group Dynamics, Safe Space, and Facilitation](#) for advice.



#### LEARN MORE

The [Giving Circle Building Blocks](#) includes an exercise for determining shared group mission and vision; see also [Mission, Vision and Values: Worksheet and Samples](#).

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SECTION VI

# Grantmaking Focus

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## Strategic Philanthropy



### TIP

While the next few pages outline the basic principles for identifying a focus, Amplifier's *Giving Circle Building Blocks* provides step-by-step instructions and exercises for facilitating conversations about your group's grantmaking focus.

➤ Strategic philanthropy can mean many things. To us, strategic philanthropy simply means that a giving circle is proactive, rather than reactive, in its giving. It means the circle starts by asking, “what are we trying to achieve?” and then develops a funding strategy to match its goals. People come to giving circles specifically because they want this kind of proactive giving: they want an alternative (or a complement) to answering friends’ requests to give to “their” organizations, or something more intentional than giving episodically, inspired by emotional responses to moving stories in the news. They also want the collaborative experience of learning about issues and philanthropy with others and the learning opportunity that a more formal philanthropic structure can provide. The core questions of strategic philanthropy are:

- ➔ What are we trying to achieve?
- ➔ What are the most effective and efficient ways to accomplish those goals?
- ➔ Where are the bright spots (best organizations/programs/people) in the landscape working on these issues?
- ➔ What impact do we want our grantmaking to have on the issues and organizations we care most about? (And perhaps: How will we measure that impact?)

It's important to note, however, that the very form of the giving circle can limit its strategic potential. Giving circles constantly balance the need to create meaningful and engaging experiences for members with the principles of strategic giving. It's not just about making “the best” grants – although that an important goal. It's also about making sure your members have a satisfying, fulfilling and enjoyable learning experience in the process. Giving circle's focus can shift as members join or leave, reforming as new opinions and ideas enter the mix. This makes it hard to develop and execute a single strategy over time, since it's challenging to transmit previous learning to new members.

You and your circle will decide how to balance these two factors in a way that reflects your members' interests and the overall trajectory of the group. You might prioritize membership growth over strategy, or you might commit to a strategy that deepens over time but could limit the chances that new members will join.

## Grantmaking Choices: What Will Your Circle Fund?



### TIP

Deciding on a grant focus is another conversation that can benefit from thoughtful and even perhaps professional facilitation. See [Group Dynamics, Safe Spaces, and Facilitation](#) for suggestions on facilitating conversations to ensure that all voices in the room are heard.

➤ Perhaps the most important thing to remember is that there's no single "right" answer to the question of what your circle will fund. So first, take the pressure off yourself to figure out the "perfect" funding area. You can always change or adapt your grant focus over time, and the world is full of so many important causes and organizations worthy of your support.

You may already have identified some funding areas through your values, mission and vision conversations. If so, your next steps are to articulate that focus in your grant application materials and weave it through your grant review process. The more you can narrow your focus, the easier the process will be on both prospective applicants and the giving circle members who nominate organizations or review applications.

### TASK 1

## Identify Member Interests

Ask yourselves: *What issues are most important to us to support through our giving circle? Where is there most alignment and overlap between our individual interests?*

There are many ways to slice the question of how to focus your circle's grants. All depend on where there is the most alignment between individual members' interests and goals. [Grant Focus Areas](#) provides examples of issue areas and other ways of narrowing your group's focus, including:

- ➔ Issue areas (education, health, environment, gender)
- ➔ Geographic focus (local, regional, national, global)
- ➔ Target audience (children, young adults, families, seniors)
- ➔ Organizational life cycle (startup, post-startup, established organization)

Keep in mind that if your circle is most interested in "seeing the impact" of its grants, then local, smaller, and newer organizations might be the best grant recipients – especially if your grant awards are relatively small. New organizations need new sources of support, and a little money can go a long way. (On the other hand, established organizations may have refined their programs over time or amassed evidence of their effectiveness.)

More on Next Page ➔

## GRANTMAKING CHOICES // CONTINUED

## TASK 2

## Map Your Assets

Ask yourselves: *How much money do we bring to the table? What else do we have to offer to grant recipients – connections to other sources of funding, professional expertise, volunteer time?*

There are many ways to achieve impact, no matter how much money your circle can contribute. Even a small sum, creatively and strategically deployed, can accomplish a great deal. If your group is risk-tolerant, for example, you could give to new programs that established funders aren't yet comfortable supporting and that may need very little to start up. You can also talk to organizations about their "wish lists" of small-but-critical things they need to improve their performance. Just stay realistic and humble about the impact you expect to have on a particular organization or an issue area. No matter how much your circle is contributing, remember to scale your requests of grant applicants to the size of the award you can offer. Smaller grants call for short application processes and small time commitments from applicants. With larger grants, you can ask more of applicants. Organizations shouldn't have to invest more resources in staff time completing their applications than they could win in a grant!

Your circle and its members might also have more to offer than just money. *Map Your Assets: The 3Ts / 3Ws* and The Center for Effective Philanthropy's report "*More Than Money: Making a Difference with Assistance beyond the Grant*" can help you think through other types of support your circle could provide to organizations that inspire you.

## TASK 3

## Assess Community Needs &amp; Assets

Ask yourselves: *What does our community actually need and want? How can we do the most good?*

Good philanthropy is a balance between communal needs and the philanthropist's interests. Before you set your grantmaking priorities, assess your community or issue area. What resources does the community already have? Where are the gaps in service and resources? What new or neglected issue might you be able to elevate in the community's consciousness by selecting it as a funding area? What new ideas are working in other places that you could bring to your community? To answer these questions, you may need expert perspectives – from other funders, community organizations or field experts, community leaders, or from local newspapers, websites and social sector reports.

More on Next Page →

## GRANTMAKING CHOICES // CONTINUED

## TASK 4

## Grant Types &amp; Sizes

To decide on the size of grants you intend to make, the duration of those grants, and the types of expenses you are willing to support, consider the following questions:

- Based on our total pool of member contributions, what amount will we give to each grantee? What minimum/maximum amounts will we set for grant requests?
- How many grants will we give per year or grant cycle?
- What time horizon are we working with? Do we expect to see results in a few months or a year, or can we provide “patient capital,” investing in longer-term, harder-to-measure change?
- Will we give multi-year grants or one-year grants?
- Do we want to support general operating expenses or program expenses?



## TIP

Multi-year grants are a philanthropic best practice: they spare nonprofits the burden of reapplying every year and fit the reality that many programs don't show results in year-long (or shorter) time frames. Such grants won't work without similarly extended commitments from your circle's members; but if they're game to consider multi-year donations, you should consider multi-year grants. If you do, make sure to think about the experience that “next year's” members will have in supporting organizations that “last year's” members chose.



## LEARN MORE

See [One Year vs. Multi-Year Grants](#) for more information on this key distinction, including benefits and drawbacks for both kinds of grants.

See [Program Grants vs. General Operating Support & Eight Tips to Being a Good Donor](#) for more information on this key difference, as well as a few tips for being a good donor.

Watch Dan Pallota's acclaimed TED Talk, [“The Way We Think about Charity is Dead Wrong.”](#)

General operating support (also called an “unrestricted” grant) is used to support an organization's overall activities, including overhead expenses; and it may be used at the grantee's discretion. Program, project, or “restricted” grants are earmarked toward one specific project or outcome. Philanthropic best practice is to provide general operating support whenever possible, and this is what most grantees prefer as well. Organizations need this critical support to pay salaries and keep the lights on. An unrestricted grant is a vote of confidence that you believe in the recipient's mission and trust them to use donated funds effectively. Many funders (including many established foundations) prefer to make restricted program grants, however, because it is often easier to measure the tangible results of the grants, and sometimes within a shorter time horizon.

## Right-Sizing Members' Expectations

➤ A giving circle is about intentional grantmaking *and* members' experiences – and it's often tricky to keep the needs and agendas of both in balance. Grantmaking is the “program” by which giving circles engage, educate, inspire, and empower their members; yet this program can impose substantial costs on the very organizations the circle hopes to support. Giving circles should *both* right-size their expectations of how much their grant money can achieve at any particular organization, *and* right-size their grant application process to minimize burdens on applicants.

One of the key advantages of the giving circle model is that it enables anyone, at any level of giving, to engage in philanthropy in a more meaningful way than just writing a check. In a giving circle, a \$100 giver can have the same experience of giving that someone on a major foundation board can have: articulating values, setting goals, learning deeply about organizations, making intentional funding decisions. Longer grant applications, a more in-depth grant review process, site visits, applicant interviews, extensive due diligence, grant reports and evaluations – all of these help giving circle members become engaged and strategic donors.

And yet: this work can potentially tax grant applicants significantly. Applicants need to ensure that they are spending their precious resources as effectively as possible, including the time and staff (or hired consultants) needed to apply for grants. From the nonprofit's perspective, the ideal grant is likely one that takes the least amount of time to apply for and offers the most amount of money – with as few strings attached as possible. Indeed, some organizations may decide it's not worth their staff time to apply for small grants from giving circles, especially ones where the members put excessive demands on applicants.

Giving circle members  
(and all philanthropists)  
should aim to be as  
humble, realistic,  
generous, and respectful  
as possible of grant  
applicants' time.

The key to balancing these dynamics is to set realistic expectations about what the circle's grants can accomplish. Giving circle members (and all philanthropists) should aim to be as humble, realistic, generous, and respectful as possible of grant applicants' time.

Amplifier's web platform has been designed with just this issue in mind. Nonprofit organizations can fill out Common Grant Applications, parts of which create entries in the public Organizational Directory. Their application lives on the Amplifier site, for all registered giving circles to see. These resources save grant applicants precious time and staff resources, since they can potentially receive grants from multiple circles based on just one Common Grant Application. They also enable giving circles of all sizes to access the same information, and to customize members' experience of grantmaking without necessarily putting undue burdens on grant applicants.

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SECTION VII

# Grantmaking Process

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## Introduction

➤ Now that you know what your circle will and won't fund, the next step is to find eligible grant applicants. Keep in mind what we've already said: form follows function; right-size according to what you are offering to grant recipients; keep your expectations reasonable; and stay humble. Be vigilant about balancing both members' and grantees' interests and needs, and respect everyone's time.

## Finding/ Nominating Organizations

➤ Typically, giving circles members either find and nominate grant applicants to the circle, or they solicit applications from organizations that fit their criteria. One of our goals in creating Amplifier was to enable giving circles of any size, in any location, and with any grant focus, to find excellent grant applicants as simply as possible. As such, this section is tailored to circles that are utilizing Amplifier's online resources (though there are lessons here for any giving circle).

No matter what process or technology your circle is using, there are a set of core questions you should ask about all grant applicants:

- ➔ Does the applicant meet our basic eligibility requirements?
- ➔ Are the applicant's mission and target population aligned with our grantmaking goals?
- ➔ Do the organization and its programs address a clearly identified and compelling need?
- ➔ Is the organization's program model innovative and/or effective?
- ➔ Do the backgrounds, qualifications, and/or experience of the organization's leadership (staff and board) seem suited to the task at hand?
- ➔ Does the organization's budget make sense, given what it is trying to accomplish?
- ➔ Is the money being used wisely and effectively?

Amplifier's Common Grant Application is a short, generic application that enables nonprofits to briefly describe their mission, goals, leadership, and financials – saving them the time and energy of submitting separate applications to multiple giving circles. Especially when potential grant awards are not large, this ensures that grant applicants don't spend more applying for grants than they stand to receive by winning them.

More on Next Page ➔

## FINDING/NOMINATING ORGANIZATIONS // CONTINUED

Giving circles registered on the Amplifier web platform can:

- Browse existing Common Grant Applications, searching by keywords, geographic focus, demographic focus, particular issue areas, budget size, etc., and “nominate” applicants that they want other circle members to review.

Members might also conduct additional research about applicants online via their websites, social media presence, the IRS Form 990 that most American nonprofit forms fill out each year (available at [Guidestar.org](https://www.guidestar.org)) and even reviews (e.g. at [GreatNonprofits.org](https://www.greatnonprofits.org)). This research aims to determine if an organization is in good standing financially, and if its mission and activities are a good match for your giving circle’s goals.

**PROS AND CONS:** Nominating applicants keeps the process simple and usually limits the number of proposals you’ll review, since the list is self-generated. It usually does not involve direct contact with the grant applicants, but it can: a giving circle may decide, for example, to interview shortlisted organizations or to conduct site visits with finalists. Using existing publicly-available information to nominate organizations can also narrow the range of organizations and issues you learn about, and you may find that the Common Grant Application doesn’t provide all the information you need to make a decision – or that the information provided isn’t tailored to the specific questions your circle has.

- Reach out to applicants already in the Amplifier system to ask them to fill out up to 5 custom questions relevant to their giving circle.

**PROS AND CONS:** This augments the Common Grant Application with questions that are specific to your giving circle’s interests. You might ask whether an applicant runs programs in the geographic area or with the demographic group you care about, or you might have additional questions about impact, measurement, and what the organization would do with the specific amount of money you have to award. This still involves a fairly limited time commitment on the part of the organization and limited additional reading time for your members. Having requested special information, your circle will now be in a deeper relationship with applicants. Whether or not you choose to grant their request, they will expect to hear from you regarding your decision.

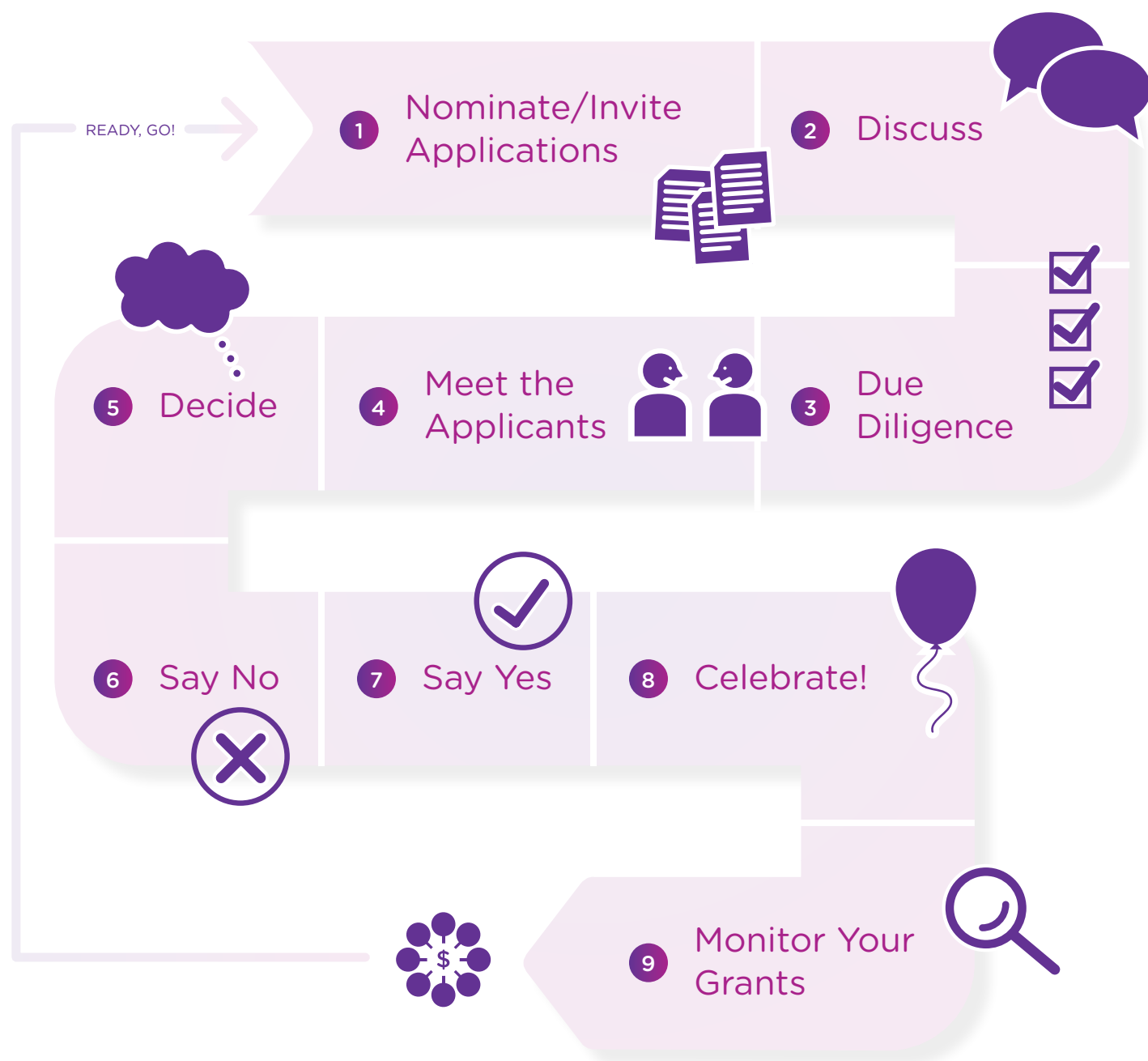
- Create a Grant Opportunity and invite organizations not yet on the system to submit Common Grant Applications and (perhaps) additional custom questions - issuing what is, in essence, a public “Request for Proposals.”

**PROS AND CONS:** Depending on how focused your Grant Opportunity is, you might receive a lot of responses. (“We are interested in funding innovative Jewish educational organizations in North America” might receive hundreds of responses, whereas “we are interested in funding food programs for low-income Holocaust survivors in Toledo” will not.) This is exciting, but also requires a lot of review time for members. On the other hand, you will receive responses tailored to your circle’s specific interests, and you may uncover new organizations and projects that other circles are not yet funding. Moreover, by catalyzing new organizations to submit Common Grant Applications, you’ll be helping the whole giving circle field, since other giving circles will now have more organizations to consider for funding!



## 9 Steps of Grantmaking

> We've boiled the grantmaking process down into 9 Steps. Your giving circle should find its own way through these steps – taking as much or as little time for each as you wish, and deciding how much you will rely on Amplifier's common resources vs. adding additional steps to your process. Below the detail on these steps are some sample grantmaking processes from existing giving circles. Before you start, make sure your circle has determined its Values, Vision, Mission and Grant Focus Areas



## 9 STEPS OF GRANTMAKING // CONTINUED

## STEP 1

## Nominate/Invite Applications

Now that your giving circle knows its Values, Mission, Vision and Grant Focus, it's time to find out which organizations can best help you accomplish your goals.

At this stage you'll need to discuss the criteria you'll use to decide between applicants.

*What criteria are most important to circle members: leadership, track record, measurable outcomes, innovation, financial structure?* This can take some time to figure out. Some of these questions, but not all of them, will be addressed in the Common Grant Applications that organizations can submit to Amplifier. Now is the time to decide whether you have additional, custom questions that you want to add to the Common Grant Application.

If your circle has decided to review existing Common Grant Applications, then this step is ● simple: give your members a timeframe in which to finish their nominations, perhaps a set number of organizations they can nominate, and ask them to do any additional research (of websites, 990 forms, etc.) that the circle requires.

If you're issuing a more public Grant Opportunity, [asking new organizations to submit](#) ● ● [Common Grant Applications](#) and/or [asking organizations with existing Common Grant Applications to submit answers to your custom questions](#), then you're going to need to promote your Opportunity. The Amplifier platform will notify organizations registered on the platform about your Opportunity, and it will allow you to share your Opportunity through your Facebook and Twitter accounts. You might also want to publicize your Opportunity through your email contacts, through other funders, and – if your grant awards are sizable – through public philanthropy resources like [The Chronicle of Philanthropy](#), [the Foundation Center](#), or [eJewishPhilanthropy.com](#). You can also encourage your members to actively distribute the Opportunity to their networks and contacts.

Make sure to acknowledge all of the applications you receive. Grant seekers work hard to get their proposals to you by your deadline. Make sure to respond to applicants' submissions, letting them know their proposals have been received. If the proposal is eligible and up for consideration, you might also want to explain the next steps and timeline for your review process.

Next Step →

## 9 STEPS OF GRANTMAKING // CONTINUED

## STEP 2

## Discuss

This step is a big one, and can take many different forms. It might even lead to further application rounds. (See the [Grantmaking Process Samples](#) at the bottom of this section.) Your basic tasks are these:

**Screen initial applicants for eligibility, and remove applicants that are definitely not eligible for funding from your circle.** The leader or grant committee chair(s) might do this just to reduce the reading load for everyone else. Perhaps organizations don't work in the areas you identified, or don't align with your circle's values. Or perhaps they're too large or too small for your circle; too old or too young; or there are clear conflicts of interest with certain members. Just make sure that whomever is empowered to make this first "cut" has a strong grasp on what the circle overall wants to accomplish, and that s/he can separate personal opinions from the basic question of whether a given applicant is technically eligible for your grants.

**Review and discuss the eligible applications.** Generally, a good applicant presents a need, problem or opportunity in the community and outlines a strategy for addressing it. The application demonstrates that the organization is sound, its plans are feasible, its goals are attainable, and its leaders are able to perform their responsibilities with excellence. The best proposals are clear and thoughtful and convey energy and some level of expertise and commitment. There's also an emotional component to these discussions that you should not ignore. Do your members like the organizations, their projects, and their leadership? Grantmaking is like matchmaking: the organizations you select need to "feel right" for your circle and its mission. Many organizations do incredibly good work on incredibly important issues – but if that work doesn't move, inspire, and intrigue you, then it's not a good fit for your grants. You don't want to be guided entirely by emotion, but don't ignore the importance of feeling good about where your circle's money is going.

**Decide how much additional research you are going to do.** Do you have enough information to make your grant decisions? If so, skip to Step 5. If not, then your ● ● ● circle needs to discuss how you're going to get the additional information you require. Some of it can be done on your own (Step 3), while some of it will also require interviewing the applicants you're most interested in and/or doing a site visit, if that's feasible (Step 4). You might also decide that you want further information in writing from the grant applicants – a larger proposal, more financial information, etc. Again, right-size: the answers to these questions all depend on how much time your members want to invest in the process, and how much you can reasonably and respectfully ask of applicants.



## LEARN MORE

See Evaluation Rubric and Evaluation Questions in Natan's [Sample Grantmaking Process Documents](#) for an extensive list of questions you might ask at this point.

Next Step →

## 9 STEPS OF GRANTMAKING // CONTINUED

## STEP 3

## Due Diligence

The next step is to do some legwork to learn more about the eligible applicants. Even before you reach out to the applicants themselves (in Step 4), there are ways to gather data on whether they are financially healthy, capable of achieving their goals, doing good and effective work, and are a good fit for your circle's funding interests. This is part of the "due diligence" process.

For some giving circles, due diligence is as simple as reviewing the Common Grant Applications. Others may include additional research through publicly available information like websites and 990 forms (see Step 1). Talking to other funders of the organization is another great way to glean information. You'll be able to see from the Amplifier platform whether other Amplifier giving circles have supported this organization, and even who some of the other major funders of the organization are. Most funders will be happy to share their thoughts on why they support an organization and what their experience has been like.

## STEP 4

Meet the Applicants:  
Site Visits & Interviews

## TIP

From Jackie Fishman, Assistant Director of The Natan Fund: *"Natan's staff – and sometimes grant committee members – spend a lot of time helping grant finalists to prepare for their interviews. We tell applicants how much time they will have, suggest they split their presentation between a quick overview of their application and time for questions from the members, and we give them a heads-up about the issues we think the members will be most interested in. If they're presenting by video, we do a lot of prep around the technology. There's also a personal element to this – we know it can be daunting for an applicant to walk into a Natan grant committee meeting, so we try to give them a sense beforehand of who the members are, what the culture of the committee is like, and how it will 'feel' to be in the room. We want them to put their best foot forward and we do all we can to help make that happen."*

Site visits or phone/video interviews are an opportunity to look beyond a written proposal and to gain a deeper understanding of a potential grant recipient. While not all giving circles take this step, many of those who do say it's the most informative, interesting and fun part of the funding cycle. It's a chance to connect with people who are doing great and inspiring work, and to gather nuanced insights about the applicant's work, perspective, challenges and opportunities. Keep in mind: visits and interviews take up an applicant's – and your members' – valuable time. Before you ask an applicant to spend time with you, consider how your visit or interview will affect the organization's daily operations. As always, right-size your request to the size and purpose of the grant you are giving, and make sure applicants know that a visit or interview doesn't guarantee a grant.



## LEARN MORE

For tips on thoughtful site visits, see [Guide to Site Visits and Site Visit Summary Form](#).

If you're doing site visits or interviews, you'll need to decide ahead of time which of your members will participate. If the entire circle participates, then the applicant will be representing itself to the circle. If only

one or two members conduct the site visit or interview, then those members will need to represent the applicant in your circle's decision-making meeting. They'll need to prepare for that presentation, thinking about how to represent the applicant fairly while also sharing their own views and opinions. Your circle might also decide to interview finalists in a "finalist presentation meeting," either in person or by phone or video. This is a great step to add if your grants are sizable, and/or if there are other advantages to the organization of meeting in person with your members. If so, you should prepare the finalists for what the meeting will be like. Many groups combine finalists' presentations with the decision-making meeting.

Next Step →

## 9 STEPS OF GRANTMAKING // CONTINUED

## STEP 5

## Decide

Your next step is for the circle as a whole to decide which organizations it wants to support with its grants. This is the fun part – this is why you started a giving circle!

Make sure everyone is prepared for the discussion – that everyone has a copy of the grant applications under consideration and any other research or background information that members have collected so far. Your tasks at this stage are fairly simple to name, but challenging (in a good way) to accomplish. You need to:



## LEARN MORE

See *Group Dynamics*, *Safe Spaces*, and *Facilitation* for advice on leading this important conversation.

**Review and discuss the applications, ideally one at a time.** Using the agreed upon criteria for evaluating the organizations, examine the merits and weaknesses of each and how well each one fits your funding criteria and interests. Try to discuss each application so that every organization that spent time applying gets a hearing. Also, if you're going to provide feedback to applicants later on, you'll need to be able to convey what circle members liked or didn't like about each application.

**Review the amount of funds available to distribute.** The leader should come to this meeting knowing how much money members have given to the circle. You can always decide to add more to the pot that night if you're especially inspired, or you can decide not to give your full grant budget away if you're not sufficiently compelled by the applications.



## TIP

From Will Schneider, Executive Director of the Slingshot Fund: *"Even in your decision-making meetings, don't lose sight of the multiple purposes of your circle. Just remember that the grants are the product, not the purpose. If a meeting is 100% about grant decisions, it is likely to be dull and not memorable. You need to build in moments for discussion, because that's what sticks with people. Not just what decisions were made, but why they were made. You could design an amazing grant-making process with the goal of making the best decisions you can, but completely fail at the goal of building community or drawing in new members."*

**Reach a consensus on which organizations to support.** There are a lot of different ways to do this. See *Making Decisions: Some Approaches*, which summarizes a few different decision-making processes.

**Decide how much each grant will be.** If you've established ahead of time that all grants are for the same amount of money, great! You're done. If not, then deciding the amount of the grant is a balancing act between your goals and resources on the one hand and the grantees' needs on the other. Will you fulfill the applicants' full request? This may limit how many organizations you can support. However, if you fund less than what grantees asked for, it may limit their ability to accomplish their goals. Will your grant awards reflect your level of enthusiasm for certain organizations (e.g., giving the biggest grants to the organizations you like the most)? Will you distribute the money equally among all the grant recipients? How do you feel about giving smaller, even "token" grants to organizations, more as a seal of approval than a financial support?

Next Step →

## 9 STEPS OF GRANTMAKING // CONTINUED

## STEP 6

## Say No

We've put "saying no" in our list before "saying yes" because declining applicants' requests is one of the hardest parts of the process, but also one of the most important. This is an excellent opportunity to demonstrate *menschlichkeit*: integrity, honor, kindness.

Jewish texts have a lot of wisdom to offer on this topic. The great medieval Jewish scholar Maimonides, for example, taught that

"It is forbidden to speak harshly to a poor person or to raise your voice in a shout, for his heart is broken and crushed...Rather, let him be like a father to him, in compassion and in words, as it is said (in Job 29:15) 'I was a father to the needy.'"

MISHNEH TORAH, LAWS OF GIFTS TO THE POOR, 10:5

Whether the applicant is technically "poor" or not is irrelevant: this teaching speaks to the value of being kind to those who are in need. How much more so to those whose request for assistance you are declining!

Similarly, the authors of Avot d'Rabbi Natan, a collection of sayings and stories written around the time of the Talmud, wrote beautifully on this topic:

"Greet every person with a pleasant countenance." [Pirkei Avos 1:15 - Teaching of Shammai] What does this mean? It teaches us that even if a person gives someone the most precious gifts in the world but his face is gloomy, then the Torah considers it as if he gave nothing.

But one who greets his friend with a pleasant countenance is considered to have given the best gifts in the world, even if he did not actually give any gifts at all.

AVOT D'RABBI NATAN, CHAPTER 13

How you deliver your disappointing news to grant applicants is just as important, if not more so, than the news about the grant itself.

Saying no is especially hard when you're declining qualified applicants that just aren't a fit for your group, or that you don't have enough money to support. With limited funds, it's simply not possible to support all the deserving, worthwhile organizations out there. The clearer you can be about your circle's goals and criteria, the easier this will be. Again, grantmaking is like matchmaking or applying to college: an applicant [or a potential date] may be objectively exceptional, but if they don't meet your subjective interests and needs, then it's not a good fit.

More on Next Page →

## 9 STEPS OF GRANTMAKING // CONTINUED

**LEARN MORE**

See Grantcraft's "[Saying Yes, Saying No: Strengthening Your Decision Giving Skills](#)."

Ask us for copies of *The Slingshot Fund's Saying No Worksheet* and *Talking Points for Decline Phone Calls*.

You might also think about other ways you can be helpful to the applicant, especially if you like the organization but just don't have the resources to support it. Could you make introductions for the organization to other potential donors, partners or volunteers? Is there non-financial support your circle could provide? Taking the conversation in this direction makes both sides feel better and can provide real value to the organization (sometimes even more than your grant would have).

Email is the fastest and easiest way to decline grant applicants; however, some people feel it's too impersonal. If applicants have invested considerable time, participated in a site visit or interview, you may decide that it's more respectful to call them personally. This also depends, of course, on the number of applicants you have and how many members are splitting up the work.

## STEP 7

**Say Yes**

Now comes the most fun part of all: saying yes! This is what you and the other members have been waiting for, a chance to make change happen.

It can be most rewarding to start with a personal call to the organization, letting them know they were chosen. It's a good idea to rotate this job among members so that everyone has a chance to be the bearer of good news.

Follow up the phone call with a written confirmation—either an email or hard copy letter—giving them the official announcement. Finally, make sure to finish the grant review process on the Amplifier web platform. This will ensure that you don't accidentally leave an expired Grant Opportunity open, that your circle's grant totals are up to date, and that your circle is officially listed as a supporter of your grantees. It will also help other circles learn from your decisions. At this point, you are ready to make the award.

● **Option A:** Send the check; end of story. This works if you don't have expectations for how the grant is going to be spent, or if you don't need to follow up to see whether your expectations were met.

● **Option B:** Send the check; stay in contact with the grantee; ask for a brief mid-grant or end-of-grant report. As we've said many times, you want to be sensitive about how much you are asking grant recipients to do for your circle. That said, reports from grant recipients are both an important way for members to see what their grants are accomplishing and an opportunity for the grant recipient to build a relationship with your circle, its new funder. See Step 9 if you decide to ask for reports.

More on Next Page →

## 9 STEPS OF GRANTMAKING // CONTINUED

● **Option C:** Create a grant agreement, perhaps a payment schedule, and reporting process. Depending on how much the grant is for and what reporting requirements you make of grantees, you might consider creating a grant agreement. Your grant agreement and any attendant requirements should correspond with the size and scope of the grant you are giving. It's reasonable to require more from a grantee for a larger grant (especially over \$10,000); however, for a small grant, it's best to keep your requirements to a minimum.

A grant agreement sets forth your giving circle's expectations of the grantee. It makes it clear to them:

- The amount and purpose of the grant
- A payment schedule—when they will get the money  
*Sooner is usually better for the grantee. You may decide, however, to hold a final payment until the middle or end of the grant period, after you've received a report on the grantee's activities.*
- The grant reports and/or evaluation metrics you require
- A provision that if the grantee's charitable tax-exempt status is changed or revoked during the grant period, that they notify your giving circle immediately, and the grant may be terminated
- An agreement that if the grantee doesn't abide by the terms of the grant agreement, the giving circle may terminate the grant  
*Terminating a grant should only occur in the extremely rare circumstance where a grantee is grossly negligent.*
- If and how the giving circle would like the grantee to publicize the grant

See Step 9 for guidance on setting up grant reports.

**LEARN MORE**

See Natan's sample grant agreement and grant report form in the [Sample Grantmaking Process documents](#).

Next Step →



## 9 STEPS OF GRANTMAKING // CONTINUED

## STEP 8

## Celebrate!

Completing a grant cycle is an excellent reason for your giving circle to celebrate! This is why you came together in the first place: to give money away, together, to worthy causes. Consider having a gathering or party to announce grant awards and acknowledge the giving circle members for their contributions of money, time and energy.

Some giving circles send out a press release announcing their grant awards to local papers or online communities (e.g., eJewishPhilanthropy.com). Whether you publicize your awards or not will depend on how public your giving circle wants to be. It can be a great additional support to your grantees – free advertising for them about how great you think they are!

## STEP 9

## Monitor Your Grants

Not every giving circle will want to keep in touch with grantees after they've made the grant. Again, your choices should reflect the amount of time and money you have to give and what you can reasonably ask of grantees. Grant monitoring means staying in touch with grantees as they implement the grant you've given them. Some giving circles ask their grantees to submit at least one or two reports throughout the grant period – at most mid-way and at the end of the period (which is often a year). Grant reports can (and should) be simple and short, with a list of specific questions you want answered. Keep your questions to what you need to know, and what will inform your work going forward. Set a limit – we suggest two to three pages. Sample questions might include:






- How were your intended goals met? What has changed, improved, or happened as a result of your efforts? (1 paragraph)
- How were the funds spent in comparison with the proposed budget? (1 paragraph)
- What did you learn most about the project or the work? (1 paragraph)
- How will this inform the way you accomplish your work in the future? (1 paragraph)
- Are there any photos, testimonials, or other materials you would like to share?
- Beyond funding, are there ways we might possibly be helpful to your organization or project in the future? (2-3 sentences)
- Is there anything else you would like us to know? (2-3 sentences)



## LEARN MORE

See the sample Grant Report Forms in Natan's [Sample Grantmaking Process Documents](#).

## Grantmaking Process Samples

					
MEMBERSHIP DEMOGRAPHICS	Families; Philadelphia	Alumni of Dorot Fellowship in Israel; global membership	Young professionals; New York City	25 to 40 year olds; Denver	Next gen funders; national membership
FINDING APPLICANTS	Acharai distributes LOI (Letter of Inquiry) in 4 grant areas (determined each year by fund members). Deadline for proposals is 6 - 8 weeks from posting.	After a conversation with the broader membership, the Grantmaking Committee sets the core criteria for organizations for the year and opens up the nominations process.	Natan distributes a public Request for Proposals in several different grant areas; deadline for submission is about 1 month from the date the RFP is sent out.	Members develop a grant priority or priorities and determine grantmaking approach, usually a Request for Proposals; ~two month window for organizations to apply	The Slingshot Guide is the applicant pool for the Slingshot Fund. The guide is created by professionals and released in the fall for a springtime giving circle.
RECEIVING APPLICATIONS	All organizations complete LOI and submit accompanying materials (financials, etc).	Any HEKDESH member can nominate up to 2 organizations that meet the core criteria.	New applicants respond with initial Letters of Inquiry. (Returning grant recipients skip this step.)	Organizations submit full grant proposals including ~4 page narrative response to questions on financials, leadership, etc.	Organizations are asked to write a cover letter to the fund, which is attached to their application to the guide.
FIRST REVIEW	Acharai members conduct financial review and those organizations that “pass” are then reviewed by committees for each grant category.	The Grantmaking Committee reviews nominations, conducts due diligence according to set evaluative criteria, and selects 5-7 semifinalists for members to vote on.	Grant committee co-chairs, any interested committee members, and staff review the LOIs and selects semifinalists.	All members read all proposals, select finalists (by consensus) to receive site visits, generate site visit questions.	Members split into reading teams to read proposals and do first cuts.
SECOND REVIEW	Sub-committees select 4-5 semifinalists and prepare specific questions for each.	Every member has 6 votes to put towards the semifinalists in whatever way they choose.	Semifinalists are invited to submit Full Proposals; deadline for submission about 1 month away.	Members divide into small groups to conduct site visits with key staff at each finalist organization.	Each second round organization is visited by 2 members. Members fill out a site visit sheet and report back to the group.
DISCUSS	Committee members meet to review responses and select 2 finalists.	The 3 organizations with the most votes become finalists.	Committee members review Full Proposals and select finalists.	Site visit teams report back and each proposal/site visit is discussed.	Second cuts are made after the site visits
MEET THE APPLICANTS	Finalists prepare “home-made” videos to show why they should receive Acharai grant (virtual site visit).		Finalists present to the committee in person or by video (1-2 meetings, depending on number of finalists).		Finalist orgs are invited in to present to the full group.
DECIDE	All Fund members gather to view videos and vote for “winners” in each category. Videos also available on private Youtube channel if members cannot attend.	Each member receives \$18 chips that correspond to his/her contribution. Members then allocate their chips however they choose across the Finalists.	Committee makes grant decisions, usually on the same night as the last finalist presentation.	Final grant decisions are made (by consensus).	Final decisions are made.

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SECTION VIII

# Creating a Learning Community

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## Educating, Engaging and Inspiring Members

➤ Giving circles don't have to stop at giving. Many venture into the roles of educating and connecting their members through events and learning – either in person or by phone, webinar, or group video sessions.

As your circle is getting off the ground, you might want to hold a recruitment event or two that combine social and educational elements. You can also use events to fill in the gaps in your collective knowledge, to build a sense of community among your members, celebrate holidays together, and get inspired by speakers who can tell you about great philanthropy and nonprofit work around you.

Events and learning opportunities have many benefits for members and the giving circle overall. They can:

- ➔ Educate and inspire members about the grant areas they've been funding or new areas of interest
- ➔ Connect members with Jewish tradition (broadly understood!) and ways it can be relevant for the giving circle's mission and members
- ➔ Offer members a chance to learn more about philanthropy, and different philanthropic models, perhaps from experienced philanthropists
- ➔ Introduce members to inspiring community leaders, academics, and visionaries
- ➔ Serve as a forum for recruiting new members
- ➔ Build a sense of community among members – giving them a chance to be with each other outside of grantmaking business-as-usual. This is especially important if your circle is big enough to split into various committees – events can bring *everyone* together.
- ➔ Give members a reason to celebrate the good work they've done

More on Next Page ➔

## MEMBER EDUCATION &amp; EVENTS // CONTINUED

**Types of Events**

Events can be anything from facilitated panels to focus groups, lectures to listening sessions, luncheons to happy hours – and the list doesn't stop there! Below are some specific types of events that your giving circle might consider – please feel free to reach out to [Hello@AmplifierGiving.org](mailto:Hello@AmplifierGiving.org) for more examples or to brainstorm particular speakers or events:

**Philanthropy events:** Help members become more effective philanthropists by bringing philanthropic leaders or advisors to talk about anything from a high-level look at philanthropic trends to a discussion on strategic grantmaking or ethics, to a more practical workshop on topics like reading organizational budgets or meeting facilitation techniques. Local and even national philanthropists are often willing to speak to groups like giving circles to share their approach to philanthropy and hear about new givers' experiences. You can also start conversations with your members about the ways Jewish texts on *tzedakah* can be relevant and meaningful for contemporary giving. Bring in a Jewish educator to help your group with this, or use the many resources on Jewish texts on the Amplifier website.

**TIP**

Asking grant recipients to speak to your group can build a sense of connection and partnership. However, think carefully if and when you invite grantees to events, and be sensitive to the power dynamics inherent in the grantee/grantor relationship. Remember that grantees may have a hard time saying “no” to an invite from a funder. Let them know you value their time and that their attendance is optional.

**Grant-focused events:** Learn about particular grant areas through events such as: a community leader speaking to the needs of a certain populations or issues; grantees talking about their work in more depth than can happen in an application process; academics or other topic-area experts.

**Community service events:** This could include members volunteering together with a grantee organization or at another community service organization. Choose a reputable community service partner and make sure that your volunteer activity will actually benefit the people you want to help.

**Celebratory events:** Some giving circles hold year- or grant-cycle-end parties where they present the grants they've made. These are festive and social events that are great to invite grantees to, as well.

**Jewish events:** Celebrate Shabbat or Jewish holidays together, feature a Jewish communal or Israeli leader, learn about Jewish texts and traditions, watch a Jewish film, etc.

**Family events:** When some or all of your members have kids, you can get creative about how to include them. Some giving circles have “family giving days” where they teach kids a boiled-down version of the giving circle model. Or you might do something more social, such as a family picnic or a pizza party.

## Building a Community

➤ **People work better together if they have time to develop relationships, to get to know and trust one another.** This is equally, if not more, true for groups meeting virtually rather than in person. Research has shown that Americans (maybe more so than others?) tend to jump right into the “task” part of a meeting, skipping the important “getting to know and trust each other” step. Your circle is *both* about the member experience and the “task” at hand (i.e. the grantmaking). Build a strong circle by starting every meeting, whether in person or not, with a short, informal “check in.” This might be about something important happening in members’ personal lives, or it might be a chance for members to reflect on how they’re feeling about the circle and its process. Members may have come initially for the content of the giving circle, but in the end, they will stay for the community the circle is building.

**Make sure members feel seen and heard.** As a giving circle leader, you will want to have a way to communicate with members on an ongoing basis. Ask them how they’re doing and for feedback about their experience in the circle. You can do this in person, by phone or email, or in more formal ways, such as feedback surveys. No matter how you

do it, it’s important to stay attuned to the experiences and needs of individual members. Make sure to keep feedback loops open.

**Respect members’ time.** If you schedule a two-hour meeting, don’t go over on time to two-and-a-half hours. Start and end on time, always.

**Never underestimate the importance of food!** Almost every giving circle we talked to includes a meal or snacks at meetings and events. Whether it’s potluck style, a catered affair, or just some snacks to keep on the table, make sure to have drinks and food to nosh on.



// NATAN FAMILY PURIM PARTY

**A lot of member engagement is trial and error.** Try different tactics to engage your members over time, and see what works well. And remember that you can’t please everybody all the time.

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You've reached the end of  
Giving Circle Essentials  
- but your journey has just begun!

The only thing left to do is to get started. No matter what choices you make about your circle's structure, mission, focus, or grants, we're excited to hear about your experience in collective giving – stay in touch!

We also welcome your feedback on the Giving Circle Essentials. Please send your thoughts to [Hello@AmplifierGiving.org](mailto:Hello@AmplifierGiving.org).

Happy Giving!

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The Natan Fund, Charles and Lynn Schusterman Family Foundation and dozens of partners contributing to this effort all believe in the power of collective giving to engage, educate and inspire givers. We share the common goal of strengthening and expanding the Jewish giving circle field.



The Natan Fund is a giving circle that inspires young philanthropists to engage actively in Jewish giving by funding innovative projects that shape the Jewish future. Natan believes that educated, engaged, and entrepreneurial philanthropy can transform both givers and nonprofit organizations.

After growing as a giving circle for over a decade, The Natan Fund is partnering with dozens of organizations across the Jewish philanthropic landscape to create Amplifier: The Jewish Giving Circle Movement.



Amplifier is supported in its pilot phase by the Charles and Lynn Schusterman Family Foundation, a global organization that seeks to ignite the passion and unleash the power in young people to create positive change in their communities and strengthen the Jewish future.

Amplifier is part of the foundation's broader efforts to build identity, community and global connectedness amongst young Jews and ensure a vibrant future for Jewish philanthropy.

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[www.AmplifierGiving.org](http://www.AmplifierGiving.org) // [Hello@AmplifierGiving.org](mailto:Hello@AmplifierGiving.org)