Giving 2.0 Giving Circles Programming

Each of your Giving 2.0 Giving Circles will engage in the Giving 2.0 Giving Circle Program and will receive 11 guides that will lead your giving circle through the giving circle process. The Giving Circle Program is your opportunity to get a hands-on experience with philanthropy in your community. It will empower you to maximize your time, skills and fundraised dollars to create real and meaningful social impact. The process will be rigorous and you should be prepared to adapt and evolve your activities over the course of the experience. However, it’s important to remember that by the end of each year of the Giving Circle Program, you will have created tangible, strategic change for both the nonprofit and the people it serves.

The Giving 2.0 workshop guides are based on decades of experience and knowledge shared by author, educator and philanthropist, Laura Arrillaga-Andreessen in New York Times best selling book Giving 2.0: Transform Your Giving and Our World and her recent Stanford/Coursera online course, Giving 2.0: The MOOC. Her book and online course provide practical guidance to develop your knowledge of strategic philanthropic practice that will spur thoughtful discussion and stimulating learning within your giving circle. Giving circle members will watch the designated week of videos prior to the corresponding workshop, as each week’s content will allow group discussions and deliberations to be informed and grounded in shared understanding. You can find all of the videos at laaf.org/project-u/

The sections below provide guiding questions that will help you and your leadership team think through and articulate your strategic and operational plan for this coming year. As always, feel free to reach out to the Giving 2.0 Giving Circles team with any questions, concerns or ideas you may have at givingcircles@laaf.org.

Giving Circle Participation Guidelines

It is important for your leadership team to determine the participation guidelines for your giving circle’s process. Some questions to consider are, feel free to include general members in this discussion:

- Are there different levels of engagement for what it to means to be a member? For example, will some members only attend some events or will all members be required to participate in the entire process?
- What are attendance requirements and how will they be enforced?
- Can new members join the giving circle throughout the year (vs. only at the beginning of the year)?
- What are your decision-making policies? How do you plan to come to a decision on your selected grantee?
- Who will be the facilitator of the workshops? Note taker? Will these roles change or be constant?
- Where will you meet?
- How often?
Timeline/Pacing

Each of the 11 guides walks you through an important part of the giving circle process and will entail significant discussion, research and iteration. The 11 workshops will not be the entirety of your giving circle meetings - we encourage you to have additional planning and strategy meetings in which you discuss fundraising, event planning and other matters. It is essential, however, that you plan ahead when you will have each of these workshops. Topics for the Giving Circle workshops will include:

- Introduction and Logistics
- Issue Area Selection
- Issue Area Focus
- Theory of Change
- Selection Criteria
- Volunteering and Nonprofit Focus
- Fundraising and Nonprofit Analysis
- Taking Stock of Resources
- Final Selection
- Crafting Metrics and Next Steps
- Evaluation and Reflection

Some questions to consider are:

- When will you have finished finding members and have your final member roster for the year?
- By what point in the year would you like to select a nonprofit grantee?
  - Do you wish to fundraise before or after a nonprofit is selected?
- How much time would you like between each of the workshops?

Once you’ve discussed these considerations with your leadership team, please outline your milestone deadlines. This will help you coordinate and stay on track as the year goes on.

Fundraising

Fundraising (often referred to in the nonprofit sector as “development”) is a critical skill for all social change leaders. Understanding fundraisers’ needs and perspectives is also important in order to be an effective philanthropist.

Please see the attached fundraising guide for tips and guidelines. Your giving circle leadership team and members should discuss what you want your fundraising strategy to be, and how you as a giving circle will implement it.

Each giving circle will outline when you wish to engage in fundraising during the year and how this compares with your plans for engaging in the nonprofit selection process. Will you fundraise before you select a nonprofit so that you know how much money you have to give away? Will you start fundraising after nonprofit selection to provide potential donors with more information? We embrace innovation and in turn we encourage you to innovate on our model depending on what works best for your giving circle and your community.
Goals:
1. Understand the mechanics of being a strategic philanthropist.
2. Design and implement an effective fundraising strategy.

1. Workshop components

- **Workshop Objectives:** These include your giving circle member learning objectives as well as key workshop goals related to chapter development, grantmaking and fundraising.

- **Discussion Section:** Discussion questions will encourage your giving circle members to share personal thoughts, feelings and experiences with giving as well as explore lessons learned throughout the giving circle process.

- **Action Section:** This section includes specific giving circle learning exercises and outlines key processes for decision-making related to grantmaking and fundraising.

- **Next Steps**
  This section includes important action items that you and your giving circle will complete before the next workshop. Tasks are individual responsibilities, unless noted otherwise, but may be delegated where appropriate.
  - **Research:** Research is a requirement of strategic giving. After each workshop, you will have specific items to research and will bring new knowledge to enhance the next workshop’s discussion and exercises.
  - **Watch:** Most weeks will ask you to watch a week of videos from Giving 2.0: The MOOC.
  - **Suggested Readings:** Weekly reading recommendations have been provided. Readings do not exceed a single book chapter and will enhance your ability to make informed decisions throughout your giving circle’s grantmaking process and in your personal giving life.
  - **Reflect:** Take time to reflect individually about what you are learning and what questions you have about giving. It will help make your time with the group more meaningful.
2. how to use these guides

- **Preparation**
  - Read through the workshop guide. Research or ask the LAAF team (givingcircles@lAAF.org) for clarification if necessary prior to leading the workshop with your giving circle.
  - Send out an email at least three days prior to the workshop recapping action items from the previous week and highlighting expectations for the upcoming workshop. For example, list items that require research and/or analysis. Clearly indicate the fundraising and grantmaking goals that will be met at the upcoming session.
  - For each meeting, we recommend bringing dry erase markers (if a whiteboard is available) or a large sketchpad and markers to capture discussion points and decisions.

- **Facilitation/Execution**
  - One or two individuals will facilitate each workshop. It could be the same individuals for every workshop or your giving circle could choose to rotate through your giving circle’s members. It is important to prepare for the session and be aware of a workshop’s specific goals and expectations. In addition to the workshop facilitator, you will also identify a scribe and timekeeper.
  - The length of each workshop will vary significantly, depending on how many participants attend, whether or not your members choose to do some research during the workshop and how quickly your giving circle can make decisions. However, regardless of the total workshop length, the facilitator will set the pace for the discussions and activities.
  - The facilitator has the opportunity to guide the discussion and move it along when it veers off track.
  - Also, the facilitator should be aware of who is speaking often and who is more reticent. One method to engage people who are shy or nervous is to break the group up into pairs and encourage the quieter individuals to share their “team’s” insights.

- **Follow-up/Feedback**
  - At the end of every workshop, the facilitator will recap the key decisions made and articulate exactly what everyone’s responsibilities are for the following week. The scribe will document these decisions and next steps. How you choose to designate the responsibilities for the upcoming workshop is up to you so long as your giving circle addresses all necessary components.
  - Following each workshop, please communicate (via email, internal blog, etc.) to the entire chapter about the key decisions your chapter made, upcoming action items and due dates.

Questions? Ideas? Feedback? Please contact the LAAF team at givingcircles@lAAF.org.

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Workshop Objectives:
1. Share your personal motivations and goals for the year.
2. Reflect on what makes giving meaningful to you.
3. Determine your giving circle’s guiding principles, operations and governing structure.

1. discussion

- **Personal Motivations**
  - What inspired you to join this Giving 2.0 Giving Circle?
  - What do you hope to achieve by participating?
  - What are your personal philanthropic passions and why?

- **Grantmaking Process**
  - Have you ever completed a formal grantmaking process before?
  - If so, what was your experience like? How could it have been improved?
  - What do you believe are the components of a successful grantmaking process?

- **Evaluation**
  - How will you incorporate continuous feedback and improvement into your giving circle?

2. action

- **Participation**
  - What is your giving circle members’ expected time commitment, including workshop attendance?
  - What are your members’ roles and responsibilities? Will the roles rotate?
  - What is your decision-making process? What are your voting procedures (if applicable)?

- **New Members**
  - How do members sign up for the giving circle?
  - Is there an application process?
  - Will you accept members on a rolling basis?
• **Workshop Structure**
  - Go over the full plan for the year so all of your members know what to expect.
  - When will each of the workshops take place? We recommend setting these dates early on and sharing them on a group calendar.
  - Will you have giving circle meetings outside of the workshops? These will likely be helpful to discuss details around fundraising or to conduct additional research.
  - When and where will workshops be held?
  - Determine who will be the workshop facilitator, timekeeper and scribe. Will these roles rotate?
  - Will you delegate program components to different groups, such as a fundraising or research committee?

• **Communication**
  - Who is in charge of communicating workshop logistics? Communicating with nonprofits? We recommend one point person for each of these responsibilities.
  - How will your giving circle members stay informed of giving circle activities, decisions and organizational developments? Will you have a giving circle website, email list or Facebook group?

• **Group Photo**
  - Take a picture of your Giving Circle

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3. **next steps**

• **Research**
  - Research the most pressing public needs in your community, nationally or globally. A responsibility of effective philanthropists is to balance your personal passions with public needs. This research will inform your giving circle’s issue area discussion at the next workshop.
  - Be prepared to recommend a social issue that your giving circle’s grantmaking will address. Your issue can be relatively broad (e.g. education, health care, homelessness) as you will refine your giving circle’s selected issue to a specific grantmaking focus in Workshop 3.

• **Watch**
  - Week 1 of Giving 2.0: The MOOC.

• **Suggested Reading**
  - “Introduction” and “Chapter 1: Giving Yourself,” *Giving 2.0: Transform Your Giving and Our World*.

• **Reflect**
  - Take a few minutes to think about an experience, an individual or an event that inspired you to give. What was one of the most powerful inflection points that shapes your giving attitudes and behaviors today?
Workshop Objectives:
1. Identify key success factors from past giving experiences.
2. Select a social issue area for the chapter’s grantmaking project.

1. **discussion**
   - **Discuss members’ past giving successes and failures.**
     - What are individual lessons your chapter can apply to make your chapter’s giving more successful?
     - Discuss what a meaningful gift means to you.
   - **Issue Area Discussion**
     - On a poster or white board have each member contribute what they are most passionate about and what they think the world’s greatest needs are.
     - Have a group discussion about how you might be able to combine your members’ varied interests and the world’s needs.
     - Consider the following questions in your discussion:
       - What values influence your motivation to give?
       - What moves, delights or troubles you when you hear of local, national and world events and why?
       - What do you believe are some of the most pressing needs of society?
       - What changes in society do you want to contribute to?
       - Do these passions stem from a concern, an intellectual interest, an emotional response or a personal connection?
       - Who are the people you want to help?
       - Is there a particular “sweet spot” where your personal passions intersect with society’s most pressing needs?

2. **action**
   - **Select the social issue area that your giving will address.**
     - Use your giving circle’s decision-making process to select the social issue that you will focus on. The issue area selected (e.g. public health, education, urban poverty, environment, etc.) can be high level, as you will select a narrower focus at your next workshop.
     - Assemble a list of questions your giving circle has about the issue that can inform your research.
3. next steps

- **Research**
  - Research the key stakeholders and the sub-issues that influence your selected social issue. To guide this research, we recommend reading “Cultivate Your Ecosystem,” an article written by Paul Bloom and Gregory Dees in the 2008 Winter *Stanford Social Innovation Review*. You can read the article here: [http://www.ssireview.org/articles/entry/cultivate_your_ecosystem](http://www.ssireview.org/articles/entry/cultivate_your_ecosystem)
  - Invite a local expert to speak about the social issue at your chapter’s next workshop.

- **Suggested Reading**
  - “Chapter 2: Connecting The Drops,” *Giving 2.0: Transform Your Giving and Our World*.

- **Reflect**
  - How might you narrow down your social issue given your enhanced understanding of the surrounding ecosystem? What criteria are important when choosing a specific grantmaking focus?
1. discussion

- Host a local expert to speak about your chapter’s target social issue.
- Based on your research and the guest speaker’s presentation, create a list of at least 10 specific challenges or opportunities that exist within your chapter’s social issue ecosystem.
- What might be the root cause(s) of each challenge and opportunity? With unlimited time, money and resources, how might you create possible solutions to improve your chapter’s select social issue?
- Considering the resources (fundraising goals, expertise, time and skills) you currently have at your disposal, where do you believe your chapter can have the greatest impact?

2. action

- Determine your chapter’s specific grantmaking focus within your selected social issue.
  - Narrowing down your grantmaking focus allows you to better compare potential grantees’ relative effectiveness.
  - For example, if your chapter has selected education as your social issue, determine the level of education, type of educational program and geographic region you will target with your grantmaking. A sample funding focus may be local K-5 English literacy for immigrants or grades 5-8 STEM (Science, Technology, Engineering and Math) education for girls.
- Discuss various strategies that exist within your grantmaking focus.
  - For example, you might focus on increasing teacher retention in public schools, attracting talent to superintendent roles or increasing access to educational technology tools. Each of these strategies has different costs, requirements, risks and potential outcomes.
  - Which strategies are the highest leverage and lowest risk based on your chapter’s resources and ecosystem? This may require some additional research. Discuss and assess the risks and benefits associated with each.
Research

- Research organizations that are effectively creating change within your grantmaking focus. What information can you publicly access about these nonprofits? What type of content do you find to be the most informative? What data appear to be the best indicators of a high-quality potential grantee?
- Research one nonprofit organization (any region or issue area) and find its theory of change.
- Is the theory of change grounded in a strong hypothesis? Does it have a viable implementation strategy? What assumptions does it make? What are specific ways to improve this theory of change?
- Be prepared to share your example with your giving circle at the next workshop.

Watch

- Week 2 of Giving 2.0: The MOOC.

Suggested Reading

- “Chapter 3: Charting a Course,” Giving 2.0: Transform Your Giving and Our World.
- “SI-63 The William and Flora Hewlett Foundation,” a case study from Project U at laaf.org.

Reflect

- Please study the Giving 2.0 Nonprofit Online Research guide. Review nonprofit evaluator websites and reflect on how they differ in their methodology. How might you use these resources to gather valuable information about potential grantees?
Workshop Objectives:
1. Develop an understanding of “Theory of Change.”
2. Gain an understanding of your giving circle’s goals.

1. Discussion

- **Mission Statement**
  - Given your issue area focus, discuss and craft your giving circle’s one-sentence mission statement.
  - It may be helpful to think about the questions:
    - Under what conditions would you feel comfortable saying, this problem is solved?
    - What would your issue area look like in a perfect world?

- **Theory of Change**
  - Share your sample theories of change and analyze them as a group. What are the strongest elements of the theories of change and what components could be improved upon?
  - On a whiteboard or large sticky notes, list your learnings (both strengths and weaknesses) about each of the theory of change components including external conditions, inputs, activities, outputs, outcomes and impact.
  - As a group, reflect on what you learned about theories of change from your research. What seem to be the most critical components? What are the most challenging components to research and develop?
  - Build your group’s Theory of Change.

2. Action

- **Publish your Mission Statement and Theory of Change**
  - After discussion, draw your theory of change and your mission statement.
  - Take a picture and send it to all members. If you have a Facebook page, website or other online group, post the picture publicly.
  - Bring the drawings to all of the following workshops.
  - Brainstorm other ways to constantly be reminded of your giving circle’s mission and theory of change.

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3. next steps

- **Research**
  - Find 10 nonprofits that fit your mission statement and theory of change by using the Online Nonprofit Research guide and some of the techniques from Week 2 of Giving 2.0: The MOOC. Pick a nonprofit that you would want to volunteer with.
  - Think about how at least two of the nonprofits you found are unique using the following criteria:
    - Geography/Population
    - Scale
    - Risk
    - Another criteria you come up with.
  - Think about which criteria are the most important to you and your giving circle.

- **Watch**
  - Review Alexa Cortes Culwell and Paul Brest’s guest speaker videos from Week 2 of Giving 2.0: The MOOC

- **Suggested Reading**
  - “Chapter 4: Determining A Destination,” *Giving 2.0: Transform Your Giving and Our World.*

- **Reflect**
  - Review and reflect on your giving circle’s mission statement and theory of change several times before the next workshop.
Choose a nonprofit to volunteer with
- From the nonprofits members have sourced, ask for recommendations of possible nonprofits to volunteer with.
- In your discussion think about whether all members could volunteer together, how much the giving circle could learn from the opportunity and what members are most passionate about doing.
- At the end of the discussion, you should have a ranked list of organizations to reach out to for a volunteer opportunity.

What specific criteria will inform your grantee selection?
- Will you focus on:
  - A particular geographic area?
  - A particular budget size?
  - A particular stage of growth and development?
  - A particular strategic approach for addressing a social problem (e.g. for education, smaller class sizes vs. district governance vs. teacher performance)?
  - What additional criteria might help you further refine how you make your decision?

Grantmaking
- How are you going to identify nonprofits that fit your selection criteria? Please identify your members’ roles and responsibilities.

Volunteer Outreach
- Appoint someone to reach out to the nonprofit you have chosen and plan a volunteer activity.
3. next steps

• **Research**
  - Research the organization you are going to volunteer with. Prepare respectful and curious questions to ask the nonprofit.
  - Based on your chapter’s selection criteria, research the nonprofits you sourced before this meeting and identify the best nonprofit that could be a high-impact grantee. Come to the next workshop prepared to share your decision-making process and recommendation with your chapter.

• **Suggested Reading**
  - “Chapter 5: Game Changers,” *Giving 2.0: Transform Your Giving and Our World.*

• **Reflect**
  - Think about how you can approach the volunteer activity with respect for the nonprofit and an open and curious mind to learn as much as you can.
Workshop Objectives:
1. Reflect on your volunteer opportunity.
2. Select your top nonprofits.

1. Discussion

- Volunteer Reflection
  - What did you learn from volunteering? This could be about the issue area, about yourself, nonprofits broadly, this nonprofit specifically or anything else you gained from the experience.
  - Are there any parts of your mission statement, theory of change or selection criteria you would want to alter from your experience?
  - Would you like to continue volunteering, either as a group or individually, with this organization or another similar organization?

- Nonprofit Research Reflection
  - What factors did you consider when researching potential grantees?
  - Are there any “deal breakers” (e.g. related to leadership, operations, programs, governance, etc.) that would prevent a potential grantee from being a recipient of your giving circle’s gifts.

2. Action

- Write a thank you note to the nonprofit you volunteered with.
- Review the Giving 2.0 Giving Circle Nonprofit Assessment and Grantmaking Recommendation Note.
- How will you gather the information to answer the Nonprofit Assessment and Grantmaking Recommendation Note questions?
  - What information can be found online and what must be gathered through external research?
3. next steps

- **Research**
  - Evaluate each potential nonprofit in-depth using the Giving 2.0 Giving Circle Nonprofit Assessment and Grantmaking Recommendation Note.
  - Note - you can also use the “What to Ask Nonprofits You Want to Fund” questions located in Chapter 3 (pp. 95-98 in Giving 2.0) to thoroughly assess the nonprofit’s organizational health and history.

- **Watch**
  - Week 3 of Giving 2.0: The MOOC.

- **Suggested Reading**
  - “Chapter 6: Something Ventured,” *Giving 2.0: Transform Your Giving and Our World*.
  - Giving 2.0 Fundraising Guide.

- **Reflect**
  - Think about the similarities and differences among the potential nonprofits.
  - Think about potential fundraising ideas that you believe would be fun and effective for your chapter.
Workshop Objectives:
1. Further evaluate your chapter’s final grantee candidates.
2. Assess your fundraising status and adjust your strategy if necessary.

1. Discussion

- **New Insights on Potential Grantees**
  - Present your group’s analysis of your final candidate. Please include your assessment of the following organizational components: leadership, program strategy, competitive positioning, financial health, social impact, knowledge sharing and continual improvement.
    - How do each of these nonprofits effectively address your chapter’s target social issue?
    - Assess and compare each nonprofit’s organizational strategy. What are the strengths and weaknesses of each strategy?
    - How does each nonprofit intend to achieve impact and how will it evaluate its progress along the way?

- **Fundraising**
  - What is your annual fundraising goal?
  - Will your members each raise and/or contribute a specific amount?
  - Will you establish a fundraising committee?
  - Create an estimated timeline for fundraising (include your chapter’s target fundraising amount).
  - Key questions to consider include:
    - Will your members pool funds from personal resources and family?
    - Will you host a large fundraising event?
    - Will everyone be responsible for raising the same amount?
    - What would be the most feasible and effective fundraising strategy for your chapter?
  - Review the Giving 2.0 Giving Circle Fundraising Guide and discuss what types of fundraising activities may be most exciting and effective for your chapter.

2. Action

- **Fundraising Milestones**
  - Based on your selected strategy, determine at least two or three key milestones (including target amount and date) to inform whether or not you are making progress towards your goal.

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3. next steps

- **Research**
  - Research “SWOT Analysis” and Social Return on Investment (SROI) for nonprofits.
  - Answer any lingering questions about the potential nonprofits.

- **Watch**
  - Week 4 of Giving 2.0: The MOOC.

- **Suggested Reading**
  - “Chapter 7: Changing Minds,” Giving 2.0: Transform Your Giving and Our World.

- **Reflect**
  - Continue to reflect on the potential nonprofits. Follow them on Twitter or Facebook (if possible).
  - Brainstorm and think creatively about the resources you have that you can use to create any kind of social or environmental impact.
**Workshop Objectives:**
1. Prepare a SWOT analysis for your potential nonprofits.
2. Discover all the resources at your giving circle has.
3. Review your fundraising progress and clarify next steps.

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### 1. Discussion

- **SWOT (Strengths, Weaknesses, Opportunities, Threats) Analysis**
  - As a giving circle, create a SWOT Analysis for each nonprofit and compare the three organizations.
  - What are the organizations’ strengths?
  - What are the organizations’ weaknesses?
  - What external factors (opportunities) will support the organizations’ future success?
  - What external factors (threats) may pose a risk to the organizations’ future success?

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### 2. Action

- **Fundraising**
  - Review your chapter’s fundraising progress and compare it to your original plan.
  - What progress have you made towards your goals? How might you improve your plan to meet or exceed your fundraising goals?

- **Take Stock of Your Resources**
  - Take three pieces of poster paper. Write “Skills” on the first, “Networks and Connections” on the other and “Other Resources” on the last one.
  - Brainstorm all of the resources each of your giving circle’s members have and what resources your giving circle’s has.
  - Think about how you could combine different members’ resources to create more impact than any individual could create by themselves.
  - Discuss how you could leverage your giving circle’s resources to create opportunities for your issue area and nonprofits.
3. next steps

- **Research**
  - Seek to answer any final questions about your potential nonprofits.
  - Discover stories of how different people have used different resources to create social impact.
  - Find ways to expand your network, in real life and on social media.

- **Watch**
  - Week 5 of Giving 2.0: The MOOC.

- **Suggested Reading**
  - “Chapter 9: In the Trenches,” *Giving 2.0: Transform Your Giving and Our World*.

- **Reflect**
  - Reflect on all you have learned about your final potential nonprofits.
  - Think about all the other members in your giving circle and how you might be able to use your resources with theirs. Feel free to connect with people to discuss further before the next workshop.
Workshop Objectives:
1. Select the nonprofit you will fund.
2. Find all the ways you can support your chosen nonprofit.

1. **action**
   
   - **Grantee Selection**
     - Have any final discussion on the potential nonprofits, if necessary.
     - As a giving circle, use your decision-making process to decide which nonprofit will receive your funding.
     - Publicize your selection through social media or however your giving circle has chosen to communicate to each other and to the greater community.
   
   - **Put your collective resources to use**
     - Bring out the posters used last workshop to review all the resources your giving circle has.
     - Discuss how you can use all of your resources to create impact for your chosen nonprofit.
     - If your giving circle has resources you might not be able to apply to the chosen nonprofit, discuss how you can use those resources for some of the final nonprofits or in other ways to expand your social impact.

2. **next steps**
   
   - **Research**
     - Identify the key metrics your chosen nonprofit uses. What are some key metrics your giving circle could use to measure your effectiveness, especially given your unique resources?
     - What are the specific indicators that would demonstrate that the nonprofit is achieving its desired impact? What specific evaluation processes will the nonprofit need to have or create to capture these results?
   
   - **Watch**
     - Week 6 of Giving 2.0: The MOOC.
   
   - **Suggested Reading**
     - “Chapter 8: Family Matters,” Giving 2.0: Transform Your Giving and Our World.
Reflect

- What did you learn about grantmaking over the past several workshops?
  - What were the three most valuable lessons you learned throughout this process?
  - What were the most challenging components of the grantmaking process? How could your giving circle improve these components next year?
  - What were the most rewarding parts of the process and why?
- How has this collaborative giving experience influenced your personal philanthropic goals?
Workshop Objectives:
1. Figure out the metrics your giving circle will use to measure the impact of your gifts.
2. Understand the next steps you will take to ensure that all of your resources are put to use.

1. discussion

- Metrics
  - Brainstorm different metrics your giving circle could use to measure the impact of your gifts.
  - Discuss the pros and cons of using different metrics.
  - Choose only a select few (5 or less) to use to measure your impact.

- Next Steps
  - Discuss how each member and your giving circle as a whole will stay engaged with your chosen nonprofit and how you can hold each other accountable to continue working with the nonprofit.

2. action

- Create Individual Work Plans
  - Each member should create a work plan to structure how they are using their philanthropic resources to create maximum impact for the nonprofit.

3. next steps

- Research
  - Research other giving circles to compare with your experience.

- Suggested Reading
  - “Epilogue: The Time is NOW,” Giving 2.0: Transform Your Giving and Our World.

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• **Reflect**
  • Reflect on the year you have had. Think about your giving circle’s processes, issue area, mission statement, theory of change, chosen nonprofit, and the experiences you have had together.
  • Think about the following questions: What did you enjoy? What would you change? What are some different things you might want to try next year? What do you need from your fellow members?
Workshop Objectives:
1. Celebrate what you have accomplished.
2. Share and document lessons learned from participating in the Giving 2.0 Giving Circle.
3. Discuss future plans for your giving circle.

1. Discussion

• **Reflection**
  - What valuable lessons did you learn from the grantmaking process?
  - What could you do differently next time to improve the process?
  - Which were the most difficult and most rewarding parts of the process and why?
  - How has participating in the Giving 2.0 Giving Circle changed your perception of giving?
  - What skills have you gained by participating in the Giving 2.0 Giving Circle?
  - How has this experience influenced your individual philanthropic goals?
  - Did you achieve your personal goals for participating in this giving circle? If so, how? If not, what can you do next year to ensure that you meet them?

• **Improvement**
  - Assemble and discuss a list of concrete changes to make for the next iteration of your giving circle and assign responsibilities to ensure these changes are made.

2. Action

• **Celebrate yourself, your fellow members and your giving circle’s accomplishments.**
• **Distill and document your most important lessons learned.**
• **What will the future of your chapter look like? Create an action plan to begin next year’s giving circle.**

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When researching nonprofits (potential grantees), it is important to assess a number of organizational components to ensure the nonprofit is meeting high standards of organizational health and accountability.

- Look for high levels of transparency in the ways funds are managed and the way achievement is tracked and measured.
- Ensure operations are well organized and appropriately supported, finances are used responsibly and programs are designed strategically and managed efficiently.
- Additionally, confirm that progress towards outcomes are effectively monitored and reported with thoughtful understanding for how this impact is achieved.

There are a number of online charity rating sites that can be useful tools when researching nonprofits. Make sure to review the sites’ “methodology” pages to understand how to interpret the various ratings. (The research methodology can also be helpful to better understand why an organization may not be included in a site’s records.)

A few online charity rating sites to explore:

- **Guidestar**, founded in 1994, was the first website to make financial and programmatic data on nonprofits easily available to the public. Guidestar provides access to nonprofits’ 990 tax forms that include information about a nonprofit’s mission, finances and programs.
  
  www.guidestar.org

- **Charity Navigator** rates nonprofits by evaluating two broad areas of performance, their Financial Health and their Accountability & Transparency, in order to show givers how efficiently the organizations will use their support today.
  
  www.charitynavigator.org

- **Great Nonprofits**, a Yelp for nonprofits, features more than 17,000 user-generated reviews based on the experiences of a client who has received services, a volunteer, a donor or board member.
  
  www.greatnonprofits.org

- **Philanthropedia** provides access to nonprofit recommendations based on the input of seasoned industry experts, offering valuable insight on impact and organizational strengths that would not be available otherwise.
  
  www.myphilanthropedia.org

- **GiveWell** examines hundreds of nonprofits to identify the top performing nonprofits that will be strong social investments today. GiveWell conducts deep levels of research to find evidence of real impact and understand what organizations are positioned to make the best use of your next dollar.
  
  www.givewell.org
Giving 2.0 Giving Circles
Nonprofit Assessment and Grantmaking Recommendation Note

Organizational assessments and funding recommendations are complex and critical processes in strategic philanthropy. Within any organizational assessment, your giving circle should consider a myriad of organizational, financial and potential impact issues as a basis for analysis.

I. Organizational Overview
   1) Agency Description:
      a. Date Founded
      b. Mission
      c. Geographic Area of Service
      d. Target Population
      e. Programs/Services Offered
      f. History of Service Provision to Target Population
      g. History/Accomplishments of Agency
      h. Reputation

II. Organizational Capacity
   1) Staff:
      a. Is the necessary leadership/management in place?
      b. If you are funding a specific program/project, who specifically will oversee the program/project?
      c. Do the skills of the staff match the needs of the organization and the program/project?
   2) Board
      Assess the following:
      a. Credibility
      b. Support
      c. Strength
   3) Infrastructure
      a. Does the organization have the systems in place to successfully use your funds?
   4) Mission
      a. Is the organization currently meeting its other objectives successfully and efficiently?
   5) Strategy
      a. Does the organization have a viable strategic plan for its size and human capital?
   6) Evaluation
      a. Does the agency have evaluation mechanisms/processes already in place for both their organizational effectiveness and their service provision?
      b. If yes, are they successful evaluative means?
      c. If no, why not and how will the agency meet evaluative requests?
III. Financial Analysis
1) Is the agency financially healthy overall?
   a. Has the organization lost money in recent years?
   b. Does the agency’s cash exceed its debts?
   c. Are there any unusual or noteworthy budgetary items that should be explored further?
2) Does the budget clearly delineate how the grant dollars would be allocated?
3) Does the budget logically support the time frame and scope of the project/program?
   a. Are the salaries and costs reasonable?
4) Does the size of the program budgets match the potential for successful implementation?
5) How do the program/project budgets fit into the overall organizational budget?
6) How does the agency measure the costs/benefits of the proposal?
7) Are the plans for additional income realistic?
8) What are the agency’s plans for future funding?
9) Would increased funding enable increased service provision without taxing organizational capacity?
10) Are all budget items necessary to the program/project and organizational success?
11) Could the agency get equal results with less expense?
12) Does the organization have clearly demonstrated needs for this funding?

IV. Leverage and Impact
Assess the following:
1) Strategic insight of agency in organizing/planning their programs.
2) Potential of the agency to successfully fulfill its proposed program/project objectives.
3) Potential impact of their programs/projects on the community.
4) Sustainability of their projects:
   a. Funding
   b. Staffing
   c. Need
5) Potential upcoming opportunities or changes for the agency.
6) Potential challenges (and solutions to those challenges) that may arise.
7) How will you know if your funding was successful?
   a. What are the outcome assessment metrics specific to your gift?

V. Program Analysis (if funding a specific program/project)
1) Does the proposal have clear objectives?
2) Are the objectives significant?
3) Are the objectives feasible?
4) Does the proposal reveal an in-depth understanding of the need/population being served by the grant?
5) Does the agency view the program/project as a priority?
6) Is the program/project an organizational or community need?
7) How will the target goals of the program/project benefit the organization/community?
8) Is the program/project the best way/vehicle by which to meet that need?
9) Is there a plan/potential for collaboration with other agencies?
10) Is this program/project a service duplication?
11) What is the agency's plan to self-evaluate the program/project?
12) Are there any potential unintended effects of the grant investment (positive or negative)?

VI. Funding Recommendation
Based on the analysis conducted in the nonprofit assessment, please provide your giving circle's final recommendation on whether or not to fund this nonprofit.
**GIVING 2.0® Giving Circles**

**FUNDRAISING GUIDE**

Becoming a strategic philanthropist is spectacularly rewarding when you understand how your grant dollars are tangibly touching and transforming both high-impact nonprofits and the individuals that they serve. But, how do you get those grant dollars in the first place? The Laura Arrillaga-Andreessen Foundation (LAAF) believes that the only thing you need to have to be a philanthropist is generosity, and everyone with generosity has the ability to effectively raise funds, empower others and inspire action. Where to start, however, may be a bit daunting.

LAAF has created a plan to help guide your giving circle’s fundraising efforts. Feel free to reach out to the Giving 2.0 Giving Circle email, givingcircles@laaf.org, if you have additional questions, want to innovate collaboratively or are jumping out of your seat to share your giving circle’s idea with others! Remember that what we create when we work together is always greater than what we can create when working alone.

**Steps**

1. **Set Your Goals**
   a. How much money does your giving circle want to raise? Be ambitious and set intermediate goals (weekly, monthly, quarterly) for your giving circle to achieve along the way.
   b. What is your fundraising timeframe?
      i. Give yourself as much time as possible to plan your fundraising strategy and potential events. Ensure you hold your event with ample time to make up any disparity between your actual and projected goals.
   c. Monitor your progress as you raise money. If a particular strategy is not working, it is important to re-evaluate and possibly change course. If giving circle members are each fundraising individually, we recommend creating a shared spreadsheet that tracks how much each member has raised to date (and you can include annual goals). Alternatively, you can create a spreadsheet that outlines each of your fundraising events with delineated goals and money raised.

2. **Fundraising Sources**
   a. Direct donation campaign: List potential donors or pledges (friends, family members, colleagues, local businesses) and approach them for support by suggesting a range of donation options ($100, $50, $25, $5). Make sure to always include other as an option. Discuss with your giving circle how you will present this giving opportunity to your potential donors. What is your value proposition (e.g. why should people give to your particular giving circle’s nonprofit over other nonprofits)? We suggest developing a 90 second “elevator pitch” for all giving circle members to use in their fundraising efforts.
   b. Product-based fundraisers: Raise money by hosting an auction or a raffle for items or experiences donated in-kind by a local organization (e.g. have a local store donate a gift certificate, a local restaurant donate a dinner or a music group offer to serenade someone at dinner).
c. Event fundraisers: Create and host an exciting event (e.g. concert, an all-night movie marathon, TED-style speaker event) where participants donate a suggested amount that will support your philanthropic cause.

3. Finding Volunteers
   a. Depending on your giving circle’s size, you might need additional people to help volunteer to support your fundraising efforts.
   b. Volunteers can come in many different shapes and sizes:
      i. Have an organization or community member donate something you can raffle or sell.
      ii. Have a local business expert help market an event you are hosting.
      iii. Assign different roles to volunteers based on their skills and interests (e.g. baking vs. letter writing vs. community outreach).

4. Publicize Your Campaign
   a. Build awareness about your fundraising plan any way you can — email blasts, fliers, local newspaper, website or Facebook event. Get as many people as possible to know about your fundraising efforts and the cause for which you are raising money.
      i. When describing the social impact of a particular program or nonprofit, it can be helpful to explain how many, how deeply and how much.
         1. How many people is the program/nonprofit serving?
         2. How deeply is it touching and transforming their lives?
         3. How much does the program cost?
      ii. Engage their heart and their minds. Share real stories that humanize the cause and data that demonstrates past and potential future impact.
   b. Spread news of your fundraiser by word of mouth. Tell friends and family and have them share information on the fundraising campaign or event with their networks as well.

5. Manage Your Money
   a. Establish a giving circle treasurer and potentially a finance committee that will help manage the giving circle’s operating and philanthropic funds.
   b. Diligently account for all money raised.
      i. Be transparent with how funds will be used and managed.
      ii. If your giving circle plans to use some money raised at events to cover event costs, ensure you are transparent with your donors about that and let them know exactly what percentage of their donation will go directly to the nonprofit. If possible, it is always best to get space and resources donated so that 100% of the donation can go directly to the cause.
   c. Decide whether the funds will go to your giving circle’s pool of funds or directly to the nonprofit you have chosen. Tax-deductible donations are only possible through a direct gift to a 501(c)(3) nonprofit, but by asking donors to give directly it can be harder to track your fundraising, understand your impact and be able to direct your funds to specific programs or operations.
6. Manage Donor Relations
   a. Make sure to thank all of your donors for their generous support.
      Sending handwritten letters can be a thoughtful and powerful way to
      strengthen donor relations.
   b. Create a formal feedback loop with your donors informing them exactly
      how their money was invested and what specific impact it created.

Ideas to Fuel your Giving Circle’s Fundraising Brainstorms

- SOCIAL MEDIA & CROWDFUNDING: As you will discover through Giving 2.0:
  The MOOC and your giving circle workshops, technology provides great tools
  nonprofits can use to increase their impact — and so can you!
  
  o Utilize social networks to reach a broad diversity of potential donors and
    build your giving circle’s philanthropic funds through a social media-
    fueled crowd-funding platform.
  
  o These different crowdfunding platforms provide a homepage for your
    giving circle to share your target social issues and goals and invite
    others to contribute to your fundraising. By sharing information and
    group updates, outside community members can become more involved
    in your work and are more likely to help you reach your fundraising
    goals.
    
    ▪ Some great crowdfunding sites to check out are:
      ∙ Causes — create a “cause” Facebook page for your giving
        circle and spread the word about your issue area and
        collect donations.
        o http://www.causes.com
      ∙ FundRazr — a fundraising app for Facebook that allows
        you to turn a Facebook page into a place where you can
        raise funds for your giving circle’s grantmaking efforts.
        o https://fundrazr.com
      ∙ Crowdrise — a fundraising site that allows anyone to
        create an online fundraising campaign and raise money
        and awareness for your cause.
        o www.crowdrise.com

- SELL GOODS & SERVICES: In-kind donations of goods and services can turn
  into real donation dollars to be granted into the future. You can host a wide
  range of “sales” with handmade and donated gifts for people to “purchase” and
  contribute to your philanthropic pool.
  
  o Make sure to always include donation jars on-site and provide
    information for how people can make online donations to your giving
    circle’s cause.

  o Specific ideas include:
    ∙ Garage Sales: Ask community members to donate unwanted
      items and compile them together for one large garage sale. Make
      this into a bigger event and sell baked goods, refreshments or
      even entertain with a local band.
- Bake and Craft Sales: Have local artists and cooks donate products to sell. Tap into your giving circle members’ talents and make other unique items to sell (e.g. paintings, photography prints, knit hats, jewelry, etc.).

- RAISE FUNDS
  - “Instead of” resource pooling: Identify fun ways your giving circle can pool your own money by shifting away from things you would have otherwise spent money on and pooling them for your charitable cause. For example, instead of going out to dinner or a movie one night of a week, have the group get together and cook a cheaper dinner and rent a movie. Then have everyone put the rest of the money they would have spent on a restaurant dinner and theater movie in your charitable pool. You’ll be surprised how this can jumpstart your fundraising. Doing this type of activity twice over the course of your program can raise over $600!
    - Each member of a 15-person giving circle pays $5 for dinner (pasta or make your own pizza) and a movie instead of $25 going out gives each person $20 to donate twice over the program period.
  - Direct letter writing campaigns: Send out letter campaigns (and/or follow up with phone calls) to people in your network. Explain your needs, your goals and invite people to support this philanthropic effort at whatever level is comfortable for them (always provide an “other” category).
    - Ideas for people you could ask:
      - Your family and friends
      - A family for which you babysit or tutor
      - Your roommates and housemates
      - A company (or colleagues) with which you intern or work
      - Your local hair salon, dentist or doctor
      - People at your place of worship
  - Utilize crowdfunding to bring donors to one online location and provide an easy way to pool funds and stay up to date with progress and impact. Even if you write letters directly to your network, you may also direct them to your giving circle’s fundraising website where they can easily get more information and donate with a click.

- EVENTS & CONTESTS
  - Put on a concert featuring a band and have attendees donate to get in or donate for drinks and food.
  - Have a car wash.
  - Host a party where attendees make a contribution to your cause as their “cover” fee — get a local DJ to play.
  - Host a meal. Have a pizza party, late night breakfast, Sunday brunch, ice cream social, wine tasting or any other event where community members buy tickets before hand and come and have a lovely social meal while raising money for your great cause.
  - Host a contest. The options are almost limitless. This could include anything from a 5k run to a volunteering (total hours) competition among friends or an obstacle course competition.
Be creative! Think outside the box about what community members would enjoy and how you can maximize the potential impact of all of your community's collective resources.

Guidelines

- **Keep your purpose and goal clear**, even in the midst of all the planning. Make sure your fundraising and philanthropic goals — as well as participant expectations — are clear to everyone partnering in your events or giving donations.
  - Describe the work you are doing and the strategies and analysis you are utilizing to ensure your grant is invested in a high-impact organization. Highlight the philanthropic issue area you will be addressing and explain how you will contribute to an organization addressing that social problem in a strategic and innovative way.

- **Don’t be afraid to ASK and aim high**! If you are looking for donors and know they might be capable of making a large donation (of time, money, intellect, etc.), explain why you are raising such capital and ask for their support. Donors may want to give in a variety of ways. You might ask if they could help your giving circle develop a fundraising event, spread the word or provide some other goods or services you can use in your giving circle’s fundraising efforts.

- **Thank your donors**! This is an essential element of successful fundraising. No matter how little or how much a donor gives, no matter what form (time, money, skills, networks), it is always important to thank those who invest in your cause with a kind letter. Make sure that you always follow up and update donors on how much money your giving circle raised, what nonprofit you selected to receive the grant and how their resources translated into specific impact.

- **Be detailed with your planning** and make sure to include fundraising expenses along with the net amount you plan to grant to your select nonprofit.
  - Tip: Try to find local businesses that might donate some of their overhead costs (e.g. stamps, stationary, envelopes, paper and other supplies) you need for your event and fundraising campaign.

- **Try something new**. Make sure not to step on the toes of other groups that might be hosting fundraising events. Evaluate your community and make sure you are not replicating an already existing event or initiative. However, you could talk to other groups that host fundraising events with similar missions and see if you could team up, share ideas for success, and make the event bigger and divide up the proceeds in a fair way.

- **Work to get the word out** about your fundraising event in any way you can.
  - Blog, tweet, create a Facebook page or event, distribute an email or print newsletter.
Fundraising Letters

- Keep them short but informative. With busy schedules people don’t want to read a novel but they do want to be informed about what you are doing, how it is important and how it will have an impact.
- Introduce yourself and include a personal anecdote about why you joined a Giving 2.0 Giving Circle and what you are learning.
- Describe your giving circle’s goals.
- Let them know about the issue area you will be donating to and how you are doing so in an intentional, measurable way.
- Give them multiple ways they can donate — online, check, cash, etc.
- Here are some resources to check out:
  o http://www.fundraisingtips.com/letters.htm
  o http://www.teamintraining.org/sj/fundraisingsupport/letters/