



FACILITATION GUIDE

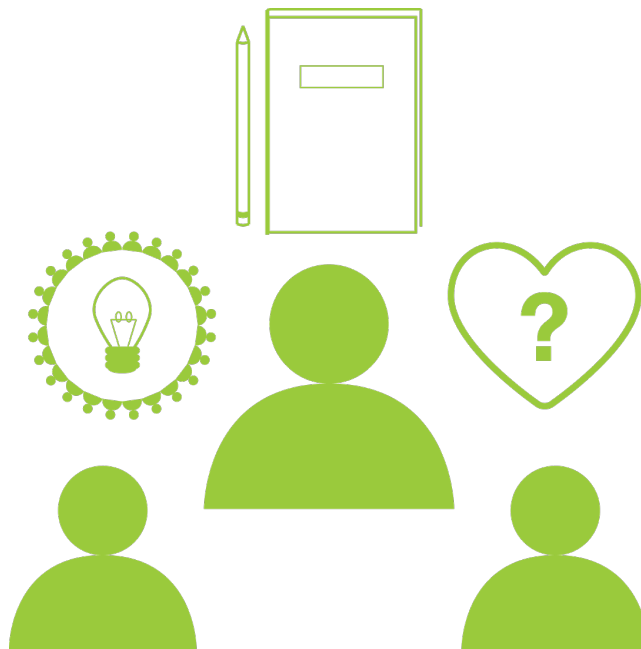


Giving Circles Fund is an initiative of the Laura Arrillaga-Andreessen Foundation, a philanthropic innovation lab dedicated to helping individuals elevate their giving through educational resources and programs.

Introduction:

Congratulations on creating a giving circle! This guide is designed to help you and your circle brainstorm and execute a strategic plan to make the most of your giving. While the sections below provide a structured approach to creating and sustaining a giving circle, they are simply suggestions—the most successful circles are creatively tailored to meet the needs and interests of their participants.

Giving Circles Fund is an initiative of the [Laura Arrillaga-Andreessen Foundation \(LAAF\)](#). We have attached several additional LAAF resources (underlined and in green) throughout the guide. For more in-depth advice on creating a giving circle, see the [Giving 2.0 Giving Circle Guide](#) based on decades of experience shared by author, educator and philanthropist [Laura Arrillaga-Andreessen](#). Feel free to reach out to the Giving Circles Fund Team at any time at info@givingcircles.org.



CREATE YOUR CIRCLE



Step 1: Recruit Your Giving Circle

Brainstorm different groups you participate in that could be interested in giving. Book clubs, teams, alumni organizations, members of your congregation, civic clubs, retirement communities, family members, professional colleagues and friends are all a great starting point for potential giving circles. Think about how easily a giving circle could be incorporated into your group's existing activities, interests and values. For example, your book club could form a circle to support literacy efforts or your kickball team could support youth fitness and wellness.

The most effective way to get members to join is to reach out to them personally. Reach out to your network via email, text message, phone call or in-person. Reflect on your reasons for starting a giving circle and how you can best convey this excitement to others. Who can say no to the power of collective passion and generosity?



Pro Tip: When you invite people to join your giving circle, you may be asked, “What is a giving circle?” Here are some basic facts:

- A giving circle is a group of people who pool their resources together to make a larger impact collectively.
- The level of participation can vary, as can the level of financial commitment. Anyone, regardless of age, income or background can be a philanthropist.
- Giving Circles Fund will help you effectively maximize your impact as we guide you through the process of vetting organizations and making grants.



Pro Tip: A great way to recruit members, especially those who are new to philanthropy, is to share information about the wonderful benefits of giving together. Here are some key points:

- According to a [UnitedHealth Group study](#), giving leads to positive increases in both physical and emotional health.
- Just like food, water and other human necessities, giving activates [pleasure circuits in the brain](#) that directly produce happiness and satisfaction.
- Giving can help you bond with others who share your passions, build concrete skills and networks beneficial to your professional life, connect you with interesting events and most importantly, grow a sense of fulfillment in the positive change you are creating in our world.

Meeting #1

We have suggested three meetings for each grant cycle, but you can meet as frequently or infrequently as you would like based on the needs and commitment of your circle.

The first meeting introduces the members of your circle to each other and establishes your circle's mission and values. Before the first meeting, choose a facilitator for the first grant cycle to take the initiative in communicating with members and leading meetings. If everyone in your giving circle is located in close proximity, try hosting in-person meetings whenever possible in order to build community. If you are unable to meet in person, you can use Google Hangouts, Skype or a free conference line to meet virtually.

We recommend you meet before the first grant cycle begins. Remember to take notes on the meeting or ask someone to serve as secretary.



Pro Tip: Hosting effective meetings can take some careful thought and planning. Here are some thoughts:

- Start with introductions. If you are on a call, ask all attendees to share their name to prevent confusion and interruptions. If you are meeting in person, you can schedule the first 15-30 minutes as social time before beginning official discussion.
- Respect people's time. Set meeting times in advance and start and end on time.
- Bring food. If you are meeting in person, snacks and drinks can go a long way to keeping everyone engaged and focused, especially if you meet around meal time.

Sample Agenda: Initial Meeting

I. INTRODUCTIONS

Who are your circle members? Have everyone make brief introductions to the group and explain why they joined the circle. A name game or icebreaker can also be useful.

- *Are there different levels of engagement for what it means to be a member?*
- *Where, when and how often will you meet?*
- *What are your decision-making policies?*

Emphasize baseline objectives like staying on topic, respecting differences of opinion and making sure everyone feels included.

II. CIRCLE MISSION AND VALUES

Your circle's mission and values are extremely important in shaping the purpose of the circle and guiding which organizations you choose to fund.

Have each person reflect on their personal passions and values.

Reconvene and have a discussion on how and where these passions and values intersect. Sharing the story of how you came to giving can create powerful emotional bonding that will strengthen your circle.

Use these reflections to define the focus of your giving circle. Is it a specific theme, like education or health? Will the focus be narrow or broad?

Reflect on what types of nonprofits you want to fund. Consider these aspects:

- *Organization size.*
- *Organization type (direct service, advocacy, etc.).*
- *Local, domestic or international.*
- *Evidence-based or new and innovative.*

Brainstorm a mission statement that encompasses your values for your circle page.

III. OVERVIEW OF THE PROCESS

Nominations: Members can nominate organizations for a grant. Remind everyone to try to find organizations that fit the circle mission.

Assessments: There is an online assessment form that any circle member can fill out—the responses to the form will be visible to the whole circle. An organization can be assessed by more than one person.

Voting: Each person gets one vote and the organization with the most votes receives funding.

IV. GIVING CIRCLE SPECIFICATIONS

Grant cycle frequency: The number of grant cycles per year: quarterly, bi-annually or annually.

Number of grants per cycle: How many organizations you fund each cycle: you can choose up to five but we recommend starting with one.

Email info@givingcircles.org for more advice on determining the grant cycle frequency and number of grants per cycle best for your circle.



Pro Tip: As a facilitator for this grant cycle, organizing a meeting is a great way to build leadership skills and help your circle bond. Here are some tips:

- Encourage more reserved participants to participate and share their thoughts.
- Ask un-biased questions to guide discussion and thank each person for their contribution.
- Silence can be an important part of an effective meeting. Resist the temptation to fill a long pause with your voice. Someone will eventually speak up.



Pro Tip: When writing a mission statement, capturing intent is more important than specific wording. Here are some examples:

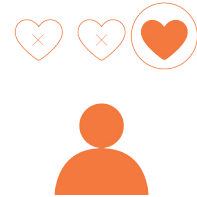
- This circle will support organizations that enable freedom and opportunity for young people through mentorship, education and experience, focusing on social and emotional growth.
- This circle's primary function is to raise money for groups supporting reproductive justice. We will focus on local organizations that have a broad outlook and are building the field's capacity.
- This circle is dedicated to supporting organizations that are using technology and twenty-first century innovation to create social impact.

Step 2: Build Your Circle Using the Online Platform

We have a built-in platform for recording circle members, grant cycle frequency and the various other details you solidified in your first meeting. Log in to our website <http://www.givingcirclesfund.org/> and begin a new giving circle by clicking on “Build One” on the home page.

Worried because you already built a circle and your circle's priorities are different from those you originally set? Email info@givingcircles.org to update them.

THE GRANTMAKING PROCESS



Step 3: Nominate an Organization

A grant cycle begins when a member of the circle submits the first nomination. You must nominate an organization to start your grant cycle. Grantees must be 501(c)(3) organizations, which is the IRS designation for public charities. Check online [here](#). The Nominate and Assess phase comprises the first two-thirds of your grant cycle.

Encourage your circle to nominate by sending a reminder email.

Meeting #2

During this meeting, go through nominations as a group. Have each person share briefly about the organization they chose to nominate and why they think it is a good fit with the circle's mission.

We recommend you meet midway through the Nominate and Assess phase.

Sample Agenda: Nominating Organizations

Each person gives a summary of the organization(s) they nominated or are planning to nominate.

Explain the assessment process to your giving circle and have members sign up for which organization they want to evaluate. This is a good time to revisit your circle's values and decide if there are any guiding criteria you will use in assessing. Make a list of who is assessing which organizations and send out a reminder email.



Pro Tip: Remind everyone that not every nominated organization will receive funding. If one of your circle members is disappointed with the results, encourage them to nominate the organization again and help with the next round of assessments.

Step 4: Assess the Organizations

The [Nonprofit Assessment Note](#) explains how to critically look at an organization's leadership, mission, values and financials to determine if the organization is worthy of your donation.

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

Meeting #3

This is a time for your group to convene, share findings and debate the strengths and growth opportunities of each organization.

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

We recommend you meet at the beginning of the voting phase.

Sample Agenda: Discussion and Voting

Each member gives a report on the organization they assessed.

Discuss which organization is most deserving of your funds.
Consider various perspectives, from financials and leadership to organizational challenges.

Step 5: Vote

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

Giving Circles Fund will send an automated email to everyone in your circle one week before the end of voting to remind each person to vote. However, we encourage you to send a personal email as well to share your excitement with your circle.

Step 6: Award the Grant

At the end of voting, you will receive an email with the results. From there, we double check to make sure that there are no legal red flags with the organization(s) your circle selected. Then we send a check to your grantee(s).



Step 7: Celebrate and Debrief!

Congratulations on making your first grant! Celebrate your success!

This is also the time to reflect on your accomplishment and figure out what did or didn't work. Does your group want to change its focus or keep it the same? Your giving circle can constantly evolve. Do not feel like you must repeat the precedents you established at the beginning of your first grantmaking cycle. You can conduct this evaluation through an honest discussion or as a formal or informal anonymous survey over email.

We would love to hear how your grant cycle went! Let us know if you have any feedback about how we can improve your experience.



Pro Tip:

- Different circle members may have different levels of engagement. Don't be discouraged by people who are less involved—continue to include them. Someone who is really busy this year might become the facilitator next year.
- The Giving Circles Fund team is here to help! We have in-depth knowledge on strategic philanthropy and would be happy to help you facilitate your giving circle.
- We host quarterly giving circle facilitator trainings to help you elevate your giving.
- Circle members can update or change their donation any time on the site, located under “Account Settings.”

Step 8: Repeat

When you feel ready, start the cycle again. We recommend choosing a new facilitator and date for your next session at your celebration meeting.

ADDITIONAL LAAF RESOURCES:

[Giving 2.0: Transform Your Giving and Our World \(A New York Times Bestseller by Laura Arrillaga-Andreessen\)](#)

[Giving 2.0: The MOOC \(Philanthropy Massively Open Online Course\)](#)

[Giving 2.0 Giving Circle Guide](#)

[ProjectU: Stanford GSB Case Study Library](#)

[LAAF's List of Philanthropy Resources](#)

[LAAF's Mailing List](#)

[Laura Arrillaga-Andreessen's Twitter](#)

[Your Giving Matters Video](#)