

# Friends and Family Giving Circle Toolkit

STEP-BY-STEP GUIDE TO HOST A 90-MINUTE GIVING CIRCLE



# INTRODUCTION

The Host Guide, Participant Guide and a list of possible nonprofit organizations to consider funding is all you need to run a 90-minute giving circle with your friends and family.

Gaining popularity in recent years, giving circles have existed for centuries and are an important practice in many cultures, religions and geographic regions. In a giving circle, members pool their individual donations and work together to determine where to give. Giving circles are versatile – they come in all sizes, vary in level of formality, duration and dollars granted, focus on different topics and form for different reasons. Giving circles enable participants to make a greater difference together than they could alone and provide a platform for learning that can deepen the meaning and impact of personal philanthropy, as well as the relationships between participants.

To help you prepare and plan for your giving circle, review the **Preparing** section and the **Host Guide**. Once your group is gathered, use the **Host Guide** and **Participant Guide** to walk through suggested activities, discussion and debrief prompts.

We invite you to use this toolkit to explore philanthropy with your family and friends and give back to your community. If you have questions as you prepare, feel free to reach out to Emily Kornhauser, director of collaborative philanthropy, at [ekornhauser@rcfdenver.org](mailto:ekornhauser@rcfdenver.org).

# PREPARING

*FOR THE HOST, IN ADVANCE*

## **Find your why**

Select from the list below two or three reasons that resonate most with your decision to host a giving circle. If you don't see your reason, write it in.

With this giving circle, I hope to...

- Deepen connections with family or friends
- Learn about something new
- Convene a diverse group of voices
- Make a difference in my community
- Respond to current events
- Give more as a group than we can alone
- Identify and express shared values
- Other: \_\_\_\_\_

## **Decide who will participate**

The spirit of a giving circle is shaped by its members. Ideal giving circle participants tend to be people who care about the journey as well as the destination, are open-minded and enjoy collaboration. The ideal group size for a 90-minute giving circle is between three and 10 people. It is possible to include more voices, but with a larger group you may wish to take more time or tightly facilitate discussions so all voices are heard.

## **Plan for contributions**

A central part of a giving circle is the financial contribution from each member. When you invite someone to participate, be clear about the expectations: how and when contributions will be collected and how much each person is asked to give.

There are many ways to structure giving. Some giving circle hosts start by defining the total amount they want to grant and divide that amount by the likely number of participants. Others identify a giving amount based on what they think the members will be comfortable with.

Here are a few options, decide what is best for your giving circle:

- Set an equal dollar amount
- Suggest a minimum
- Offer a range
- Encourage each member to make a personally meaningful contribution and keep individual donation amounts confidential so the group knows only the total amount

## **Set a process for decision-making**

Throughout the giving circle process, you will make important decisions as a group. The value of having many voices around the table is that decisions are stronger and more informed. However, keep in mind that no one likes drawn-out conversations without results. It's important to define how decisions will be reached upfront so that the process can move forward efficiently.

Our favorite decision-making motto is “consensus influences, but majority rules.” Discussions are inclusive and prioritize hearing and understanding of all perspectives, and when it’s time for the group to decide, a vote is taken, the majority rules, and the group moves on. Whatever decision-making structure you choose, be sure to share it with your group.

### **Determine which nonprofits to consider**

With so many nonprofit organizations doing important work, it can be difficult to decide where to direct your gift. One of our favorite ways for groups to source a list of potential grantees is to ask each participant to share the most meaningful donation they have made in the past 12 months. You can add additional parameters if you wish (e.g., geographic location or a maximum annual operating budget).

If you are interested in giving in the Greater Denver Community, Rose Community Foundation’s grantees are a wonderful place to start:

- [Rose Community Foundation Grantees](#)

Additionally, the Foundation staff is happy to provide lists of local nonprofits for your consideration in issue areas central to our mission of advancing equity, justice, inclusion and engagement. Reach out to Emily Kornhauser, director of collaborative giving, at [ekornhauser@rcfdenver.org](mailto:ekornhauser@rcfdenver.org).

Prepare to provide everyone with the following information for each organization that will be considered by the group:

- Organization name and mission
- Programs or work the organization does in pursuit of its mission
- Optional: approximate annual operating budget

If individual members are suggesting nonprofits for consideration, ask them to come to the meeting prepared to share the above information. If you as the host will be compiling a list of nonprofits for the group to consider, it is best to create and print a document with the above information. We recommend proposing to your group between three and 10 organizations for consideration.

### **Plan for making the gift**

One option is to have each participant write individual checks at the meeting to your selected nonprofit recipient and then mail the checks together. You can also collect individual contributions digitally (PayPal, Venmo) and have the host donate with a credit card online. If the host or one of the members has a donor-advised fund with Rose Community Foundation, the participants can all donate into the fund and the fund can make the grant.

Consider whether participants will wish to itemize their donations for tax purposes. If so, individual checks or donations into a donor-advised fund will be necessary.

### **Gather materials**

- A printed copy of the Host Guide
- Printed copies of the Participant Guide for each participant, including yourself
- A printed copy of the list of nonprofits the group will consider, including the key information listed above for each
- Pens

# HOST GUIDE

## I. Welcome – 5 minutes

Set the tone for your giving circle by welcoming your guests. We suggest including the following in your remarks:

- Why you wanted to host the giving circle and what you hope everyone will gain through the experience
- Reminder of the total funds the group will give together
- Summary of how you will use the time together and the steps in the process
- How decisions will be made
- Suggest a few group norms and ask the group to commit to them and/or propose others. A few we like include: listen to seek understanding; step forward and step back (engage and also create space for others to engage); honor and respect one another
- Give participants a chance to ask any questions

## II. Introductions and reflections – 10 minutes

It sets a nice tone and invites all voices into the conversation to begin by having each person briefly reflect and share. Here are a few prompts you can consider asking the group to respond to as a starting point for your collaborative work. In the interest of time, just use one:

- Something or someone who recently inspired you
- A recent moment in which you felt gratitude
- The best gift you have ever given or received

## III. Finding shared values – 20 minutes

Rooting giving decisions in values is powerful. Sharing and discussing values gives us a deeper understanding of one another and creates a common foundation for group decision-making. Identifying shared values transforms a group of individuals into a collective giving circle.

Have each participant turn to the Values List in their participant workbook. If you believe Jewish Values may resonate for your group, reach out to Rose Community Foundation to receive a deck of our Jewish Philanthropic Values Cards.

Give everyone three minutes to individually review and reflect on the Values List, identifying their personal top three values and circling them. If someone's values are not represented on the list, invite them to add them.

Ask each participant to share aloud the values they selected, why those values resonated and how they show up in their life or giving. Ask everyone to tally the check marks in their own workbook as people share.

Together, identify two or three values that are shared by the most members to serve as the guiding values for the giving circle's discussions. Ask for group agreement or, if necessary, take a vote.

#### **IV. Discuss nonprofits – 45 minutes**

##### *Initial information sharing – 15 minutes*

Have each participant share the organization they are proposing for consideration, or, if the host is providing a list of nonprofits for the group to consider, take turns having participants read aloud the provided information about each organization.

Ask the group to listen for how each organization's work aligns with the group's shared values and to consider whether and why each organization resonates for them individually. Encourage people to take notes if they wish.

After each profile is read, ask for a few observations or takeaways to be shared aloud but resist the urge to diver into deeper comparative discussion until after all organizations have been shared.

##### *Discussion – 15 minutes*

Discuss which of the organizations most reflect the group's shared values and/or most resonate with people. Other discussion prompts to consider:

- Do any of these organizations feel more relevant to our community's current needs?
- Where might our collective gift of \$X have a greater impact?

Ask each person to share which organization they would like to support and why and tally the count.

##### *Decision-making – 15 minutes*

Hopefully, the discussion narrowed down the list. To arrive at a final decision, you will likely need to take a vote and award the pooled funds to the nonprofit receiving the most votes. If the vote is divided between two nonprofits, discuss whether the group would like to split the funds and make two grants.

#### **V. Celebration and closing – 10 minutes**

Pop a bottle of champagne, let out a communal sigh of relief, shed a few tears of joy or have a mini-dance party - you did it! Take some time to enjoy this moment. Reflect together with one of the following prompts:

- What were you surprised by?
- What is something you learned?
- What is next for you in your giving?
- What was different about this than your typical giving practices?

Don't forget to share with the group how and when you will collect the funds and make the donation, and of course, we'd love to hear about your experience using this guide. Reach out to Emily Kornhauser, director of collaborative giving, at [ekornhauser@rcfdenver.org](mailto:ekornhauser@rcfdenver.org).

# PARTICIPANT GUIDE

## Values list

Take three minutes to review and reflect on the values listed below. Identify the three that most resonate for you personally and circle them. If your values are not represented on the list, use the blank boxes to add them.

Beauty	Change-making	Citizenship	Collaboration
Community	Conservation	Courage	Creativity
Empowerment	Equality	Equity	Freedom
Heritage	Humanity	Inclusion	Individuality
Inspiration	Justice	Kindness	Learning and Teaching
Peace	Self-reliance	Stewardship	Wellbeing
Wisdom			

**Review and discuss nonprofits**

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**Our collective decision**

*We will fund...*

**My reflections and takeaways**

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We'd love to hear about your experience using this guide. Reach out to Emily Kornhauser, director of collaborative giving, at [ekornhauser@rcfdenver.org](mailto:ekornhauser@rcfdenver.org).