

A STEP-BY-STEP GUIDE TO A
FOUR-SESSION GIVING CIRCLE,
ROOTED IN JEWISH VALUES.





WELCOME!

Thank you for your interest in facilitating a giving circle! We're glad you're here. By bringing people together to learn, act, and give, you are embodying the core pillars of Jewish tradition—Community (Kehillah), Generosity (Nedivut), and Giving for Justice (Tzedakah).

Giving circles have existed for centuries around the world. While many guides contain a wealth of resources beyond a four-session experience, our **Giving Circle in a Box** is designed for people who are new to the landscape of giving circles and are seeking a simple way to get started.


This toolkit gives you the nuts-and-bolts of convening a giving circle in four sessions — from identifying goals to recruiting participants; offering discussion prompts to collecting money and more.

The arc of these sessions will encourage participants to build relationships, explore Jewish values, learn about giving, and make a collective gift. We hope this toolkit will serve as a springboard for convening your giving circle and will be your first stop on a longer philanthropic journey.

SESSION OVERVIEW

Meeting 1	Members get to know each other and explore personal and shared values.
Meeting 2	Identify the mission/focus area of the giving circle.
Meeting 3	Learn about potential grant recipients, whittle down the list, and select finalists.
Meeting 4	Award grant (or donation) and reflect on the giving circle process.
Meeting 5 (Optional)	If capacity and enthusiasm allows, we invite you to bring the group together for a volunteer project, social activity, or a deeper dive into your organization (for a Federation, for example.) This can be done anywhere in the sequence.

Don't hesitate to reach out to Amplifier at amplifier@jewishfederations.org if you have any questions about setting up your giving circle, or are looking to build a more custom experience. You can also check out our [Giving circle Essentials toolkit](#) for a deeper dive into giving circles.



"Great is tzedakah, for since the day
that the world was created until this
day the world stands upon tzedakah"

Midrash Tanna d'Vei Eliyahu Zutta 1

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"For there will never cease to be
needy people in your land, which is
why I command you; open your
hand to the poor and needy."

Deuteronomy 15:7-8



AMPLIFIER'S GIVING CIRCLE IN A BOX
AGENDA AND FACILITATION GUIDE

GETTING STARTED:

GIVING CIRCLE PREP GUIDE FOR FACILITATORS



SECTION ONE

LET'S GET GROUNDED

WHAT IS A GIVING CIRCLE?

A giving circle is a group of people who come together to pool their charitable donations and decide how to give in ways that reflect their values, passions, and the impact they want to make on the broader community. A Jewish giving circle focuses on giving to Jewish causes, or on giving that is inspired by Jewish values. Giving circles often function as engagement tools for many different groups — women, LGBTQ people, young leaders, people of color, empty nesters, people with disabilities, and others — who may share common philanthropic interests and want to make an impact together.

Your circle might be made up of your friends, colleagues, members of an organization, family, or community members – anyone who joins together to make a difference for their community or cause. A giving circle makes giving a collaborative, social experience.

WHY DO GIVING CIRCLES MATTER?

Small groups have the capacity to make big changes! [Research suggests](#) that when people give together proactively and strategically — and deepen relationships with each other along the way — they can maximize their impact and become more involved with causes they care about for a lifetime. Members of giving circles tend to give more generously and are more likely to tell other people about the organizations they support. This creates a ripple effect beyond the circle itself. See the [full article](#) on page 19.

Giving circles support leadership development, build skills like grantmaking, consensus building, and advocacy, and are meaningful ways to engage a new or existing donor base. They offer deeper, relationship-building opportunities that allow for new types of connections with underrepresented constituencies and donors who are under engaged, opening pathways to long-term leadership and giving.



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.

SECTION TWO

BEGIN YOUR JOURNEY



IF YOU ARE CONSIDERING STARTING A GIVING CIRCLE,
ANSWER THE FOLLOWING KEY QUESTIONS:

- ✓ Why do you want to launch a giving circle?
- ✓ What do you want participants to walk away with?
- ✓ What do you want to have accomplished by the end of the four-meeting arc?

Defining this from the beginning will help inform all the next steps.

Examples include:

- I want to do something fun and impactful with a community of people who want to make a difference.
- I want to engage existing or would-be major donors to give at a higher-level to my organization.
- I want to meaningfully engage new people who are not already involved in philanthropic efforts or who could be more involved.
- I want to develop the leadership of people who can take action or support my organization.
- I want to learn more about giving with my family/friends/community.

Write your answer here:



WHO IS YOUR GIVING CIRCLE FOR?

Your answer on the previous page will inform who you will invite to your giving circle. Which identities, values, skills or demographics do you want represented?

Examples include:

- Family
- Friends
- Neighbors/Community Members
- Alumni of a school/camp/experience
- People interested in a certain issue
- People who share an identity or life experience in common (Jews of Color, LGBTQ+ Jews, Jews living with a disability, Jews caring for elderly parents, etc.)
- Donors that fit in any of the above category
- Lapsed donors
- Next Gen leaders or young donors

We recommend a minimum of five or six members, and no more than 20.

Who is your giving circle for? Write your answer here.

TIPS WHEN CONSIDERING WHOM TO INVITE:

STAGE OF LIFE

Young professionals, couples, families, empty nesters?

FOCUS AREA EXPERTS

Some circles include a mix of members: some contributing financial capital and others contributing professional or subject-specific knowledge about the funding area.

SPECIFIC DEMOGRAPHICS

Will you have age, gender, geographic, professional criteria? Will your circle include people who are Jewish and people who have different religious and cultural identities? Some groups like to stay homogeneous; others embrace diversity. There's no right answer!

MORE THAN MONEY

There are many ways that members can add value to the group beyond financial contributions. Social capital: bring you access to networks you want to be connected to; Professional skills your group or your grantees need; High-profile leaders in the community.



SET UP LEADERSHIP STRUCTURES TO ENSURE THE SUCCESS OF YOUR GIVING CIRCLE.

Consider whether this is something you have the capacity to do on your own or whether you will need a lay or professional partner to help. Here are some tips for creating a leadership structure for success:

- Leading anything is easier with a partner. Consider inviting someone to help you with planning, recruitment, and facilitation.
- If you are a professional, consider bringing on a member, donor, or lay leader as chair or co-chair to help with planning and recruitment. They can help answer questions about donation amounts, help make asks, and invite participants. The right lay leader may even help with facilitation!
- If you need help with facilitation consider bringing in an outside facilitator.



WILL YOUR FOCUS AREA BE PREDETERMINED OR WILL THE GIVING CIRCLE MEMBERS DECIDE TOGETHER? WHAT ARE YOUR PARAMETERS?

Your giving circle will make a grant within a specified focus area. There are two paths to determine this focus area, and you will decide in advance which to pursue:

1. **Decide on a focus area with your members as part of the giving circle process.**

If the decision making is up to the members we recommend being clear about any boundaries, but leaving the options as broad as possible within those boundaries.

2. **Learn together about a predetermined focus area.**

Maybe you are giving to local causes (any issue with work happening locally), or any organization that is already a grantee of your Federation. Maybe the focus is related to a specific issue: to immigration, housing, Jewish education, etc.



HOW MUCH MONEY WILL EACH PERSON CONTRIBUTE? HOW MUCH MONEY WILL YOU GRANT?

Part of the beauty of a giving circle is that participants are contributing their own money and therefore have a stake in the outcome of the process. How much you ask members to give is entirely up to you, and should be based on what you know about your community's comfort with giving and capacity to give. If your giving circle is a part of an organization, you can set an expectation for both a minimum contribution to the organization and to the giving circle. Here are a few options for giving structures:

- A minimum donation, or sliding scale with no maximum (\$18+, \$360+, \$1,800+)
- A set donation (\$18, \$360, \$1,800)
- A suggested donation of a meaningful amount
- Tiered donations for members of different ages or experience levels
- You can also solicit or offer a match from a giving circle member, separate donor, or from your organization to make a bigger grant. ***Whatever amount you ask for, it is important to be clear about the ask when you invite members to your giving circle.***

While this guide uses the language of grant and donation interchangeably, this four session giving circle does not include a request for proposal (RFP) process. Your giving circle will independently learn about and select organizations or programs that fit your focus area and choose one to receive a donation.

How much will you be asking members to contribute? Will there be other sources for your grant?

SECTION THREE

NUTS AND BOLTS



THE NUTS AND BOLTS OF YOUR GIVING CIRCLE

You will need to decide the more technical questions about your giving circle before you launch — ideally, eight weeks before you convene for the first time.

When and Where

What type of gathering space(s) would be most convenient for your participants over the course of four meetings and would encourage strong attendance? Are people more likely to come in the morning? Evening? In-person? Virtually? Most importantly, the atmosphere and space should be conducive to open conversations. If you are meeting virtually, which platform is best? We recommend Zoom, although it depends on your own comfort level and the familiarity of your audience with any given platform.

Location

- **In Person:** Living room, communal room at a synagogue, backyard, conference room at an office, private space at a café.
- **Virtually:** Zoom, Google Hangout, other virtual meeting software. Make sure your audience is familiar with the platform, that you can create breakout rooms, and take a vote.

Scheduling

- The dates of your four giving circle meetings should ideally be pre-determined. This allows for participants to commit to all meetings and have them on their calendars.
- As there are only four meetings total, we recommend keeping meetings no more than 2-3 weeks apart to keep the momentum going.

How will you Handle Money?

How will you collect money up front and hold on to it until you make the grant? How will you make the grant itself and communicate to members that the money has been donated? Can you build donations into the registration form? You can use a platform like www.Grapevine.org to handle all aspects of financial management including providing members with a tax exempt receipt. If you're a group of family and friends and receipts are not required, you can use checks, Zelle, Venmo, or similar platforms.

If your giving circle is at an organization it may be easiest to collect contributions as donations to your organization, in which case be sure the fiscal and/or allocations team is looped in from the beginning and can assist with the entire process from collecting contributions to making a donation.

We strongly suggest collecting donations by the first meeting! Individual follow-up might be needed if you do not hear back from invitees. Make sure to leave time for this 2-3 weeks before your first meeting.

Prepare for Recruitment and Registration

Now that you've clarified your goals, desired audience, contribution, and your logistics, it is time to recruit! Recruitment is often the most time intensive part of a giving circle. Give yourself eight full weeks before your first meeting and plan to ask 4x more people than you want to ultimately have at your giving circle. That means if you want 10 members, you should plan to make 40 direct asks in addition to any general invitations through an email blast or social media posts.

NOTE: If you have one, lean on your co-leader, chair, or co-chairs to help gut-check ideas, plan and recruit members!

Have Everything you Need Ready to Go

- ☐ Prepare a way for people to register: Google forms, Eventbrite, Zoom invite, your own organization's registration method, or your own excel sheet as people email you or confirm.
- ☐ Prepare a description of your giving circle that will answer questions people may have with a fun and compelling pitch to join your giving circle. (See page 21 for [a sample](#))
- ☐ Share what participants will get from the experience:
 - Is it an opportunity to try something new? To build community? To take their leadership to the next level? To have a say at your organization? To learn more? To meet other people who care about the same issue?
- ☐ Share what participants need to know to say yes:
 - When and where the giving circle is taking place
 - Contribution expectations
 - How to sign up or ask any questions
- ☐ Make a list of people to talk to and invite. This can include both prospective members, connectors (who would not join but know people who might), and listservs/groups of prospective members and/or connectors.
- ☐ Make a plan for recruitment. If you have co-leaders or chairs, divide up the list and set deadlines for outreach. If you have 8 weeks to recruit, reach out to everyone in the first 2-3 weeks to allow time to follow up, to schedule one-to-one calls, and for connectors to make connections.

NOTES

Recruit!

- ☐ Determine the best communication method based on your audience:
 - Email or text individuals, send a group invite, post in a social media group etc.
 - Create a template for each and send it out with necessary edits to each individual or group. (*See suggested email template on the following page*)
- ☐ Follow up with personalized, one-to-one asks.
- ☐ As giving circle members say yes, ask them to suggest 2-3 additional members to invite. Have them make the invitation or make a connection.
- ☐ As giving circle members commit to the experience, send them a confirmation note thanking them for joining, confirming the date and time of the first meeting, and reminding them to make their contribution if they haven't done so already (template available in outline for meeting 1).
- ☐ You may also want to send them a formal agreement to sign. (*See page 22 for [a sample](#)*)

NOTES

SUBJECT LINE: You're invited to participate in my upcoming giving circle!

BODY:

Hi *[recipient first name]*,

I'm thrilled to invite you to be a participant in a giving circle I am facilitating. In case you're unfamiliar, a giving circle is a group of people who come together to pool their charitable donations and decide how to give them in ways that reflect their values, passions, and the impact they want to make on the broader community. By facilitating a giving circle, I hope to *[Add a sentence about the goal of your specific giving circle]*.

[Add a sentence here explaining why this particular individual is someone you'd like to be part of your Giving Circle]

The commitment to participate involves a financial contribution [option to outline a minimum contribution] as well as attending four 2-hour long giving circle sessions during which we'll identify shared values and grant focus areas, learn about organizations doing important work, and ultimately select an organization to fund. The meetings schedule is:

[Meeting 1: Day, date, time, location]

[Meeting 1: Day, date, time, location]

[Meeting 1: Day, date, time, location]

[Meeting 1: Day, date, time, location]

I truly hope you'll consider joining me in this rewarding experience! Please let me know by *[X/XX]* if you're able to participate — and if you have any questions, I'm happy to hop on the phone to discuss further.

Best,

[your name]

CONGRATULATIONS! You have made it to the end of the prep section and are ready to begin your giving circle! Continue by reading the facilitation guides for meetings 1-4.

Reference Sheet 0.1

Engaging Millennials with Jewish Peoplehood: What Does It Take?

Dr. Shlomi Ravid, Executive Director of the Center for Jewish Peoplehood.

This article was originally published on [eJewish Philanthropy](#). It is an essay from volume 17 of The Peoplehood Papers and published by the [Center for Jewish Peoplehood Education](#).

To be honest, in our work at The Natan Fund, a giving circle made up of New York-based professionals in their 20s-50s, we seldom if ever think in terms of “Millennials” or other generational monikers. Rather than read studies and craft programs reflecting their conclusions, we simply listen to people and build programs around their goals, needs and aspirations.

The most important contemporary trend that our Millennial and other members ascribe to is the ability to be as empowered in their giving as they are in so many other aspects of their lives. In today’s DIY culture, where people are accustomed to being “producers” rather than “consumers” of their life experiences, many people also want a hands-on role in their giving. Rather than send a check to a faceless institution, or sit at a friend’s table at another gala dinner, they want a more transparent giving experience that they customize and control. Witness the success of DonorsChoose, Kiva, GiveDirectly, where the giver has 100% control over the allocation of his or her contributions.

Giving circles—groups of people who pool their charitable resources and decide together how to give those resources away—provide this experience of empowered giving to their members, with the added bonus of collaborative learning and action. Giving circles inspired by Jewish values, like Natan and the dozens that are part of Amplifier: The Jewish giving circle Movement, are living and breathing manifestations of Jewish Peoplehood. Importantly, as the Amplifier network demonstrates, Natan is just one flavor of giving circle. The model itself is infinitely customizable, and thus the opportunities to utilize giving circles as a tool for building Jewish Peoplehood through philanthropy are endless.

Let us briefly focus on just two of the core ways that giving circles build a sense of Jewish Peoplehood.

First, a Jewish giving circle is a community inspired by Jewish values. Members build relationships, networks, and a sense of collective belonging between themselves, their grant applicants and recipients, the people their grants ultimately reach, and even other funding bodies. Natan members, for example, come together to review applications, interview applicants, and make grants – as well as for regular events with other philanthropists, Jewish and Israeli leaders, and grant recipients; for occasional holiday celebrations; and for an annual Israel trip, which now includes a visit to another global Jewish community as well. The infinite customizability of the giving circle model

Reference Sheet 0.1 | Giving circle Article

enables any type of community to emerge: one created top-down through an institution or bottom-up through members; around any age demographic and even multi-generational; in any geographic location or even virtual; and as broadly inclusive as the group wants it to be (members don't even have to be Jewish!).

Second, a giving circle can decide to support any element of Jewish civilization with its grants. For example, Natan's grants support nonprofit organizations that create new access points to Jewish life and that support economic development and urban renewal in Israel. One grant committee focuses on North America, another globally; another on initiatives for Russian-Speaking Jews; another partners with the ROI Community to support its Jewish innovators around the world – and so forth. Reviewing grant applications from hundreds of organizations working to address issues facing Jews around the world is an unparalleled experiential education in Jewish Peoplehood. From independent spiritual communities to new media initiatives to outdoor education to social businesses supporting Israel's weakest populations, Natan supports inclusive, inspiring, effective

organizations that embody Jewish pluralism and deepen the richness of Jewish civilization.

One overwhelming theme emerges from our conversations with Natan members., Whatever their official generational designation, giving circle members want the same things that previous generations have wanted: a connection to something larger than themselves, meaning, community, opportunities for great conversations, and a role in shaping the present and the future. They want to collaborate in networks to achieve these goals. And in an open marketplace where they have access to just about anything, they expect Jewish experiences and programs to be as high-quality, smart, and professional as any other activity. We don't pretend to have exhaustive answers about the desires of Millennials, nor do we claim that the type of person who affiliates with Natan is broadly representative of their peers. Instead, we want to suggest that the giving circle model offers an ideal formula for engaging Millennials and any generation in compelling conversations, meaningful experiences, and the ability to make change in the world through empowered, intentional philanthropy. ■

Reference Sheet 0.2 | Sample giving circle description for recruitment

JEDI National Giving Circle

A Partnership between JEDI and Amplifier at JFNA

[Contact Amplifier if you would like an editable document.]

About giving circles:

Amplifier, powered by the Jewish Federations of North America, is an experiential learning lab for collaborative and democratized giving, rooted in Jewish values. We empower people to give more intentionally, more meaningfully, and in community, engaging more people in tzedakah and amplifying their impact.

This experience is often achieved through a giving circle--a group of people who pool their charitable donations and decide together where to allocate their money. Giving circles are a simple but powerful way to bring people together to learn about a specific organization or issue area, build community, and make a stronger impact than they might be on their own.

Participants explore their own values and giving behavior, discuss the values of the group, decide an issue area they would like to fund, send out requests for proposals, and vote on a project or organization to fund.

JEDI Giving Circle:

Amplifier and JEDI are convening a 4-6 session giving circle (1 hour to 1.5 hours each between November 2022-April 2023), where participants will become familiar with and be able to champion JEDI's work, and ultimately give to JEDI projects on top of their existing annual federation giving.

A goal is to engage existing and new donors and leaders passionate about justice, equity, diversity, and inclusion to the work happening at JFNA and across Federations.

We will recruit 10-15 participants who will each contribute \$X to the circle, allowing us to grant out \$X+ to JEDI initiatives At JFNA and in the field.

Session outline (subject to change):

Session 1: Community building and an introduction to JEDI

Session 2: Focus Area: An exploration of JEDI challenges and opportunities across the field

Session 3: Giving circles, grantmaking process, and Jewish giving

Session 4: An exploration of the JEDI Curriculum/work

Session 5: Grantmaking and Closing Celebration

Reference Sheet 0.3 | Sample Participant Agreement

Giving circle Participant Agreement

A Partnership between JEDI and Amplifier at JFNA

[Contact Amplifier if you would like an editable document.]

Welcome to the XX giving circle Cohort. Through this experience, you will learn about the impact of Jewish philanthropy, explore your individual and collective Jewish values around giving, build community, grow your passion for Jewish philanthropy, and deepen your commitment to the Federation.

Professional Leadership:

All giving circle sessions will be facilitated by X.

MEETINGS:

There will be four meetings. *[List here the meeting dates, times, and the topic for each session]*

- Lay leaders will let their local professional know if they are unable to attend a meeting with as much notice as possible and local staff will facilitate a follow-up call to catch up on missed content
- Given the condensed nature of the giving circle, we hope lay leaders will miss no more than one meeting.

DECISION-MAKING PROCESS:

[You will fill in your own plan for decision making, but below is an example].

- Giving circle members (lay leaders) decide on the core values, grantmaking priorities, and ultimate grant recipients of the giving circle through a facilitated, consensus-based decision-making process.
- Members are encouraged to actively participate in each meeting to build community and make meaningful, values-aligned grantmaking decisions.
- All members in attendance at a meeting will participate in decisions made at that meeting, while absent members forfeit decision-making for meetings they are unable to attend.

GRANTMAKING:

[You will fill in your own plan for grant making, but below is an example].

In the earlier sessions, lay leaders will be deciding on issue areas funded by your Federation that you want to discuss funding, and from that information your local professional will work internally on presenting appropriate projects to fund.

CONTRIBUTIONS:

[You will fill in your own plan for contributions, but below is an example].

- Contribution amounts are decided upon by local professionals.
- **Minimum gift to participate:** Each community will determine what the minimum gift a participant should ALREADY be giving to Federation
- **Additional gift to participate:** As this is an active giving circle, each participant will contribute a designated amount for this allocations exercise. The amount is determined by your local Federation, and they are responsible for collecting it from you prior to the start of the cohort.

Conflict of Interest:

Please report any conflicts of interest to your local professional, including formal or informal associations, with any individuals and/or organizations under consideration for funding. Members who serve on a Board of Directors of organizations being considered, who share a personal relationship or have a longstanding relationship of support with a potential grantee, must recuse themselves from voting on that particular grant.


Statement and Signature:

I have read the agreement and understand my roles and responsibilities as a member of this giving circle experience.

Print Name: _____

Signature: _____

Date: _____

A decorative orange square with a series of concentric circles on the left side. The text is written in a handwritten-style font in a darker orange color.

"Hillel used to say,
The more tzedakah,
the more shalom."

Pirkei Avot 2:8



AMPLIFIER'S GIVING CIRCLE IN A BOX
AGENDA AND FACILITATION GUIDE

MEETING 1

COMMUNITY BUILDING & VALUES



FACILITATION GUIDE: FIRST MEETING

Getting to know each other and deciding on values



Duration: 2 hours

The Basics

GOAL: To build community, introduce participants to the giving circle process, identify Jewish values that will inform your giving circle, and practice decision-making as a group.

Preparing for your Meeting

IN ADVANCE OF THIS MEETING

- **Carefully review the Prep Guide:** This includes an in-depth overview of giving circles and shares the steps to take to recruit participants and prepare for your first meeting.
- **Read through this facilitation guide:** Carefully review this guide to understand the meeting purpose, core sections, timing, and meeting logistics.
- **Confirm participants have made their contribution or will do so at the meeting:** By the end of the first meeting, make sure each participant has made their gift, and confirm how much the group will be allocating.

WHAT YOU'LL NEED FOR THE MEETING

- **A meeting space:** Meetings can be held anywhere – a member's home or office, a park, or even a restaurant/cafe/bar. Be sure the space is conducive to the kind of conversation you'd like to have, and that everyone in the group will be able to see and hear each other.
- **A note-taker:** Make sure someone is jotting down important decisions, next steps, and assignments — no need to go crazy recording every word!
- **Supplies:** For collaboration/note-taking, we recommend a flip chart or whiteboard, paper, and writing utensils. Bring name tags in the event that you are a large group and/or members do not yet know one another.
- **Food and drink:** A must!

MEETING VIRTUALLY? HERE ARE SOME TIPS:

1. Use virtual meeting platform allowing everyone to engage such as Zoom.
2. Host at least one “test” session before your first meeting to work out any technological kinks. Practice the technical components you will need like screen sharing, creating breakout rooms, etc.
3. Assure your members have access to all the documents they need so you can read and review together. We recommend sending links to any documents by email in advance.
4. If any participants are new to the technology you are using, send tutorial videos and offer time before the meeting for them to get comfortable with the technology. Practice walking people through engaging with all aspects of the technology from muting and unmuting to using chat features, etc.

Pre-meeting Communication with Participants

We recommend sending a **pre-meeting reminder email** to participants in advance of this first meeting. Feel free to use the email template below as a starting point:

SUBJECT LINE: Giving circle Meeting #1 on [date] — we can't wait to see you!

BODY:

Hi *[recipient first name]*,

I am excited to see you at our first giving circle meeting on *[date]* at *[time]* at *[location]*.

The goal of our first meeting is to meet fellow participants, build community, get grounded in the giving circle process, and identify Jewish values that will inform our work together. I'm truly looking forward to a meaningful and productive session.

Thank you for your donation! [OR] Our giving circle will give a collective grant by pooling contributions from each member. Please send your gift of *[agreed upon amount]* by *[method (venmo, check, etc.)]* before the first meeting.

Please let me know if your plans have changed or if you have any questions. See you soon!

Best,
[your name]

Agenda at-a-glance

Your first giving circle meeting will be about two hours in duration. Below is a high-level overview of your agenda.

PART 1 Overview and Introductions (50 minutes)

BREAK (10 minutes)

PART 2 Values Discussion and Alignment (45 minutes)

PART 3 Next Steps and Close (15 minutes)

Meeting Agenda

PART 1 | OVERVIEW AND INTRODUCTIONS



Duration: 50 minutes

1. ARRIVAL AND SOCIAL TIME (10 min.)

This is the time to grab some snacks, say hi, and take a seat.

2. OPENING AND INTRODUCTIONS (10 min.)

- a. Kick off the meeting by briefly describing what a giving circle is and why you wanted to start one. Share the broad goals of your giving circle.

SUGGESTED SCRIPT:

- “A giving circle is a group of people with shared values that pool funds and decide together where to give.”
- Share a bit more about why you chose to host a giving circle and who this group is. Examples could include: to learn about particular organizations addressing an issue area, to honor a person’s life cycle event, to gather meaningfully with people in your community. The more people can understand why they are coming together, the more they will feel inspired by a shared purpose.
- “Our goals are....”

- b. If your giving circle is part of an organization (like through a Federation, JCC, Synagogue, etc.), share a bit more about the organization and its work, how the giving circle fits in, etc. If your giving circle has a chair, this is a great place for them to take the lead.
- c. Share a brief agenda for the evening. You can also have it on a slide or written on flipchart paper on the wall.
- d. Ask participants to introduce themselves, explain why they're participating, and, if applicable, what prior experience they've had with your organization (if any — this could be their first time!).

FACILITATION TIP:

State how long you expect answers to be, and model by going first and making sure your answer is as short as you want everyone else's to be. Try to keep it to thirty seconds, or just one or two sentences.

3. ICE BREAKER: QUESTION GAME (15 min.)

- a. Get the group warmed up with an opening ritual/ice-breaker to help ground in Jewish learning, build community, and set the tone for your shared time together. We suggest the Question Game below, but you will also find additional ice breaker ideas on page 38.
- b. **Question Game:** Start with the following text (share it on a slide, on flipchart paper, or on a handout, [this link also includes audio](#), you can find the segment and play it (3:35–4:26). After it is read, ask someone to sum up what the text says. The answer you are looking for is some version of “Judaism is about asking questions!”



“Judaism is the rarest of phenomena: a faith based on asking questions, sometimes deep and difficult ones that seem to shake the very foundations of faith itself. “Shall the Judge of all the earth not do justice?” asked Abraham. “Why, Lord, why have you brought trouble on these people?” asked Moses. “Why does the way of the wicked prosper? Why do all the faithless live at ease?” asked Jeremiah. The book of Job is largely constructed out of questions, and God’s answer consists of four chapters of yet deeper questions: “Where were you when I laid the earth’s foundation? ... Can you catch Leviathan with a hook? ... Will it make an agreement with you and let you take it as your slave for life?” — Rabbi Lord Jonathan Sacks z”l

FACILITATION TIP:

Define as many Hebrew terms pre-emptively as possible and invite questions. Encountering texts can be alienating or frustrating for participants, either because they are unfamiliar or have not enjoyed past experiences with Jewish text. Make this encounter with text accessible by acknowledging and welcoming the range of experiences and comfort levels your giving circle members bring. Invite everyone to engage with this activity whatever their prior experience. There are no prerequisites!

c. Introduce the icebreaker**SUGGESTED SCRIPT:**

- *We're going to start with an icebreaker called the question game. Someone will start by turning to the person on their left and ask any question from "how was your day?" to "why is the sky blue?" That person cannot answer, or repeat. They need to turn to the person on their left and ask another question. Continue around the circle like this twice.*
- *Transition by asking a few participants to reflect on what that was like. To tie it all together, add: "This giving circle experience won't be entirely without answers, but it requires being open to each other and the questions!"*
- *Transition script: "To help us make sure we feel comfortable asking questions and seeking answers, we're going to establish some community norms."*

4. SETTING GROUP NORMS/CREATING A BRIT OR COVENANT (5 min.)**a. Set up community agreements.**

Have the group identify some community agreements for your shared conversations — in whatever terms and with whatever level of formality works for your group's culture. Talking about money and values is hard and sometimes taboo; so setting up some guardrails for discussion can be helpful. Some examples might be:

- Confidentiality: What's said in the room, stays in the room
- Take space, Make space / Step up, Step back
- Speak in "I" statements, from personal experience
- Be fully present, and be generous to those who can't be.
- Lean into discomfort – and each other
- Listen with curiosity and resilience

5. OVERVIEW OF OUR GIVING CIRCLE (10 min.)

- a. Review the four meetings of your giving circle by quickly go through the arc of your time together.

SUGGESTED SCRIPT:

A giving circle makes a collective grant through an intentional process. In doing so, the members build leadership skills and grow community. Each giving circle process is unique. This giving circle is four meetings long. At this meeting we're orienting to the process and identifying our Jewish values. At the next meeting we'll be identifying our focus area [and/or learning more about our focus area]. At our third meeting we'll be learning about possible grantees. At our final meeting we will be deciding on our grant and reflecting on the giving circle process.

- b. Ask for and answer any questions that arise.
- c. Preview the next section. Before taking a short break, let participants know that the next part of the meeting will be dedicated to values. The group will collectively identify values around giving and decide on the shared values of the giving circle.

Break (10 minutes)

NOTES

PART 2 | VALUES



Duration: 45 minutes

1. CONVERSATION GOALS AND DEFINITIONS (5 min.)

- a. Explain that the purpose of today's conversation is to decide what matters most to the group in the form of values.

Suggested script: "Values are the core principles that guide us in our work and life; they inform how we interact with each other as a group, and how we interact with the world (e.g. "communal responsibility"; "tzedek — justice"; "commitment to Israel and its people")."

- b. Spend some time on why values.

Suggested script: "The reason we are starting with values is that they are an incredibly powerful tool for leaders/donors/people committed to making a difference. It is incredibly easy to go with the flow – to allow the dominant norms or values of whatever space we're in to inform how we act. However, if we first name the values we want to embody, and then check our actions and decisions against those values, holding to them even when it is hard, our leadership can be truly transformational. It's not easy, but it starts with identifying values. That's not where it ends. It's where it start, and so that's where we're starting as a giving circle."

NOTE: if you are at an organization, this is a good opportunity to share your organizational values and how they inform your work!

2. VALUES CONVERSATION (30 min.)

The purpose of this conversation is for members to articulate personal values and establish shared values that will underlie the group's giving. This discussion will help participants get to know each other and find areas where values overlap. The objective of this conversation is not to find complete unanimity. Rather, you are searching for consensus, which means that everyone consents to the decision — even if they disagree with it somewhat — because it's the best decision for the group at this moment. The result will be a set of shared values that resonate enough with everyone in the group to have them guide the circle's giving. This is what enables the group to move forward.

Process for Values Conversation:

a. Identify personal values.

- Write a predetermined list of Jewish values on your whiteboard or flipchart — we recommend the following. You can add the Hebrew if you like. We suggest including the transliteration and translation whenever you include Hebrew so that it is widely accessible:
 - » Repairing the world
 - » Community
 - » Responsibility
 - » Loving kindness
 - » Peace
 - » Human dignity
 - » Love the stranger
 - » Service
 - » Saving Lives
 - » Hope
 - » Holding multiple truths
 - » Memory
- Spend 3-5 minutes having participants read through the list and ask them to create a personal values list, identifying their top 2-3 (“most important to me in my giving”) and bottom 2-3 (“least important to me in my giving”).

NOTE: If you'd like an alternative to writing the values on a whiteboard or flipchart (with Hebrew), you can print out a one-pager with these values that's included in the reference section on page 41 (printable version available at this [link](#)).

b. Identifying group values.

Depending on the size of your giving circle do the following in groups of 3-4 or all together (if you are fewer than eight members):

- Once participants have created their personal lists, spend 10-20 minutes having each person share their list, explaining their selections. Make sure everyone who wants to has a chance to speak; limit people to a minute or two (depending on the size of the group) if necessary.
- Review everyone's lists and spend 5 minutes aggregating the responses, tallying which values were selected by the most people — both the “favorites” and the “least favorites.” Many of the values have similar meanings (e.g. “compassion” and “kindness”), so cluster these and agree on a word that reflects the group's collective intentions.
- Agree on one collective list for moving forward, with the goal of having 2-5 values total for your giving circle.

FACILITATION TIPS FOR VALUES CONVERSATION:

- *The goal is consensus not agreement. Thus if most people love a value but one person feels very strongly against it, it should be removed from the list and you can move forward with values that everyone is ok with. We're not here to debate individual values but to find the values that work best for the full group!*
- *If you are having trouble narrowing lists or getting caught up in what words mean, ask participants to explain what the value means to them in practice — the same word will mean different things to different people. It helps to have people make reference to specific stories from their lives to illustrate why they chose (or didn't choose) a particular value.*

NOTES

3. FORMULATE A VALUES STATEMENT (10 min.)

Once the group's values are aggregated, spend 10-15 minutes formulating a values statement for the group. Ask the group to take three minutes of silence to draft a statement if they want. Let them know that you will invite a few people up to write and edit a statement. Once the time is up, invite whoever is ready to read a statement and/or write it on the flipchart or whiteboard. You can collect multiple statements and then try to combine them or bring up one statement and then invite amendments. Then make sure everyone is ok with the aggregate statement you end up with.

A sample statement:

"Our group values innovation — many of us want to use our philanthropy to find new and creative ways of bringing more loving kindness into the world."

TIPS FOR WRITING A VALUES STATEMENT:

- *Remember — you're aiming for general agreement about what's important to people, not a perfect explanation of every value the group holds dear.*
- *Don't spend too much time wordsmithing. That can be done as homework, if necessary.*
- *Assign someone to consolidate the statement(s) to reflect the group's values and send it to the leader(s) before the next meeting.*

NOTE: Make sure the note-taker records the final statement/list of values or takes a picture for future reference.

NOTES

PART 3 | NEXT STEPS & CLOSE



Duration: 10 minutes

1. NEXT STEPS (2 min.)

- a. What needs to be done next, if anything? By what date? Who will do it?
- b. Confirm that the values statement will get finalized and sent to the full group before the next meeting.
- c. Remind the group when and where the next session will be, and let them know that you'll be sending a reminder email with information about the next meeting.

2. CLOSING RITUAL (8 min.)

End the meeting with an activity based on the following drash (interpretation of a text or tradition) on the end of Shabbat by Rabbi Michael Uram.

- a. Have members read the text below and then do the activity that follows.



"Shabbat ends at a moment called "tzeit ha-kochavim" or the appearance of three stars in sky. We might have expected the rule to be that we simply wait for sky to turn black, but instead, Judaism asks us to search the darkness around us until we can find three bright spots in the sky.

If darkness is seen as a metaphor for all the challenges in our lives and for all of the brokenness and injustice in our world, then this peculiar ritual reveals itself as profound teaching about how to begin each week in a world that is not yet perfect.

Rather than simply gazing into the darkness, which might feel overwhelming or insurmountable, we instead begin each week by finding three points of light, three aspects of our lives and the world around us that are good—three points of light on which we build a more meaningful life and a more perfected world."

— Rabbi Michael Uram, Chief Jewish Learning Officer, JFNA

- b. Go around and share the "points of light" coming out of this meeting.

3. SOCIALIZE: SPEND SOME TIME SOCIALIZING AS PEOPLE LEAVE!

Post-meeting Action

1. **Send an email** to participants with a summary of the first meeting and a reminder for the next one.
 - a. Ask the note-taker to share their notes with you to craft the summary. This summary should highlight the values that the group decided upon to guide its giving.
 - b. Remind those who took on finalizing the values statement when that work is due and who to send it to.
 - c. Remind participants of the next meeting date, time, and location.
 - d. Feel free to use the email template below.

SUBJECT LINE: Giving circle Meeting #1 Recap + Upcoming Meeting on [date]

BODY:

Hi *[recipient first name]*,

Thank you so much for attending our first giving circle meeting! I deeply appreciate your active participation and am proud of the discussion we had around collective values. We covered a lot, so below, please find a summary of the highlights.

[link to a summary document or paste key points here]

I'm excited to continue our conversation at our second meeting on [date] at [time] at [location]. At this session, we'll develop our giving circle's focus areas and will discuss the grant-making process.

Please let me know if your plans have changed or if you have any questions. Thank you again for your meaningful participation!

Best,
[your name]

2. Begin reviewing the **Second Meeting Facilitation Guide: Develop mission, vision, and focus areas, discuss grant-making process** so you can begin preparing for another productive session with your giving circle!

Reference Sheet 1.0 | Additional options for opening and closing rituals

Additional Opening Rituals

Option 1: Share an Intention

Take a moment to share what you hope to gain from this experience and how you intend to be present in the exercise. Here is an example:

“May my tzedakah decisions be thoughtful and intentional. May this tzedakah offering make a positive difference in the world. May I give it with a generosity of spirit and humility. May I find ways, through this tzedakah offering or other activities, to inspire others to also give intentionally and generously. And may my thoughts and actions of tzedakah help me to have more feelings of compassion and loving kindness in all aspects of my life.” — Julie R. Sissman, Amplifier Committee Member

Option 2: Practice gratitude

Take a minute to thank everyone for coming. Recognize that they are giving their time and resources and appreciate them! If there is time, have people then share what they are grateful for in the moment.

Option 3: Why We’re Here

Have people write or draw one reason for why they showed up today on a post-it note. Have everyone then take their post-it note and place it on a wall with everyone else’s post-its.

Additional Closing Rituals

This reflection can be individual, in pairs/small groups, or with the whole group. Prompts for this reflection should also look to the future — what will this moment lead to? Here are a few closing ritual examples:

Option 1: In pairs, each partner takes three minutes to talk about whatever is on their mind. The other partner should only listen and not say anything. After three minutes, the facilitator calls time and the partners switch roles.

Option 2: Have everyone gather in a circle, hold hands, close their eyes and take three collective breaths.

Option 3: Have the group gather together and go around in the circle, each participant sharing one thing that they either learned, appreciated, or will take with them from their time together.

Option 4: Go around the circle and ask: “What next step in this process am I looking forward to?”

Reference Sheet 1.1 | Additional resources when facilitating your values conversation

Review pages 10-13 from our [Pop-up Giving circle Facilitation Guide](#), which includes additional exercises that you can use to define your group's set of shared values. Remember to extend your total meeting time as needed to accommodate additional exercises. They are below for your reference as well.

Additional values exercises - 1

Divide the group into small groups of 3-8 depending on how large the main group is. You can either do this during the event or beforehand. Consider assigning a table captain to keep conversation moving.

The facilitator says: *"We'll now explore what inspires each one of us to give. You'll have 8 minutes in small groups to review a series of quotations and select the one that inspires your giving. Take 3 minutes to read on your own, then go around and invite each person to share the quote they chose and why it resonates"*

QUOTES:

Vayikra Rabbah 4:6 — *"Some people were sitting in a ship when one of them took a drill and began to bore a hole under his seat. The other passengers protested, "Why are you doing that?" He said to them, "What does it matter to you? Am I not boring the hole under my own seat?" They answered, "Because what you're doing will sink the ship for all of us."*

Yavilah McCoy, CEO of Dimensions — *"Work to repair a single relationship where there has been harm, much less a global society, can often be challenging, so I am holding myself accountable to approach this question with humility, and to ask it in the spirit of beginning with what is within reach of each of my hands to accomplish."*

Lilla Watson — *"Indigenous Australian Activist| If you have come here to help me, you are wasting your time. But if you have come because your liberation is bound up with mine, then let us work together."*

Pirkei Avot 6:2 — *"In a place where there are no people(or a person), make an effort/lobby to be that person."*

Rav Tiferet Berenbaum — *"We read in the Haggadah that "in every generation, we are commanded to see ourselves as one leaving Egypt." This is because slavery wears a different cloak in different generations, and we have to see ourselves, see it for ourselves, and understand it in order to help those who are currently stuck in its grasp."*

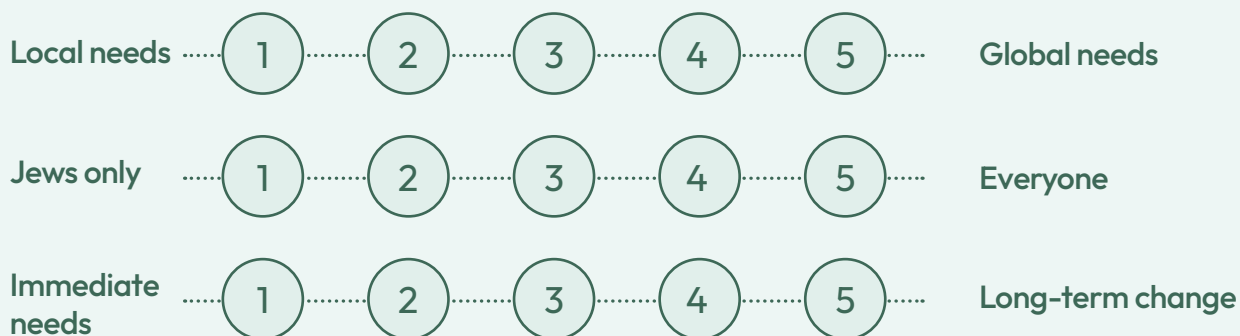
Rabbi Jill Jacobs — *"Does this mean that we have godliness in us? Are we physical manifestations of God? What does that mean? But one thing we know it means is—if you meet a homeless person on the street and they may smell bad and they may not look like anyone else in your actual physical family right now—but the challenge is to see the image of God in this person."*

Additional values exercises – 2

Facilitator says: *“Now that you’ve come up with values for your small group, you’re going to explore the impact you would like your giving to have.”*

1. **Individual:** Review each spectrum below. Choose a number that reflects where you land on each one.
2. **Group Share:** Go through each spectrum one at a time and find out where everyone landed, asking a few people to share why, ensuring that if there are people with very different responses, they each have a chance to share.
3. **Group Consensus:** Try to find alignment for your group on one end of each spectrum. You may find alignment between your underlying motivations, even if the values were different.

I WANT MY GIVING TO GO TO



After the group has had a chance to discuss, gather everyone back for quick reflections. Ask: What was it like to go from individual to group values and impacts? If you have time you might also ask: What surprised you about the process?

Additional values exercises – 3

Option to use the following resource on the facing page as a handout or poster to facilitate your discussion around values. Printable version is available at this [link](#).

AMPLIFIER

Jewish values that guide my giving...

Place a dot next to each of the Jewish values that guide your giving, or write an additional value next to “other”.

Repairing the world Tikkun Olam תיקון עולם	Community Kehilla קהילה	Responsibility Achrayut אחריות
Loving kindness Chesed חסד	Peace Shalom שלום	Human dignity Kavod Habriyut כבוד הבריות
Love the stranger Ahavat ger אהבת גר	Service Avodah עבודה	Saving lives Pikuach nefesh פיקוח נפש
Hope Tikvah תקווה	Holding multiple truths Elu v'elu אלו ואלו	Memory Zikaron זיכרון
Other _____ _____ _____	_____ _____ _____	_____ _____ _____

"The blessing of tzedakah
is greater for the person
who gives than for the
person who receives."

Leviticus Rabbah 34:10

A series of concentric, light green arcs are positioned at the bottom of the text box, partially overlapping the citation text.



AMPLIFIER'S GIVING CIRCLE IN A BOX
AGENDA AND FACILITATION GUIDE

MEETING 2

MISSION & FOCUS



FACILITATION GUIDE: SECOND MEETING

Getting to know each other and deciding on values



Duration: 2 hours

The Basics

GOAL: The goal of this meeting is to narrow down or learn about a focus area and to continue building community through hands-on activities. Your participants will decide on or learn more about the giving circle's grant focus area(s), learn about the grant-making process and next steps for finding organizations, and articulate a mission and vision for the circle's giving.

Preparing for your Meeting

IN ADVANCE OF THIS MEETING

- **Read through this facilitation guide:** Carefully review this guide to understand the meeting purpose, core sections, timing, and meeting logistics.
- **Review your notes and values statements from the first meeting:** Follow up with the value statement writers/editors a few days before the meeting to get the final language so you can share it with the group.

WHAT YOU'LL NEED FOR THE MEETING

- **A meeting space :** Meetings can be held anywhere – a member's home or office, a park, or even a restaurant/cafe/bar. Be sure the space is conducive to the kind of conversation you'd like to have, and that everyone in the group will be able to see and hear each other.
- **A note-taker:** Make sure someone is jotting down important decisions, next steps, and assignments — no need to go crazy recording every word!
- **Supplies:** For collaboration/note-taking, we recommend a flip chart, whiteboard, paper, and writing utensils. Bring name tags in the event that you are a large group and/or members do not yet know one another.
- **Food and drink:** A must!

MEETING VIRTUALLY? HERE ARE SOME TIPS:

1. Use a virtual meeting platform — one of our favorites is Google+ Hangouts, Google's free video-chat platform, or Zoom.
2. Host at least one "test" session before your first meeting to work out any technological kinks.
3. Be sure your members have access to all of the documents they'll need so you can read and review them together. We recommend sending links to any documents by email in advance.

Pre-meeting Communication with Participants

We recommend sending a **pre-meeting reminder email** to participants in advance of this second meeting. Feel free to use the email template below as a starting point:

SUBJECT LINE: Giving circle Meeting #2 on [date] — we can't wait to see you!

BODY:

Hi *[recipient first name]*,

I am excited to see you at our second giving circle meeting on *[date]* at *[time]* at *[location]*.

Building upon the values we selected at our first meeting, the goal of our second meeting is to narrow down a focus area and to continue building community through hands-on activities. Together, we'll decide on/learn about our grant focus area(s), learn about the grant-making process, and articulate a mission and vision for our circle's giving.

Please let me know if your plans have changed or if you have any questions. See you soon!

Best,
[your name]

Agenda at-a-glance

Your second Giving circle meeting will be about two hours in duration. Below is a high-level overview of your agenda.

PART 1 Identifying a focus areas (1 hour)

BREAK (10 minutes)

PART 2 Crafting a Mission Statement (30 minutes)

PART 3 Preparing for the grant making process (10 minutes)

PART 4 Closing (10 minutes)

Meeting Agenda

PART 1 | OVERVIEW AND INTRODUCTIONS



Duration: 60 minutes

1. ARRIVAL AND SOCIAL TIME (10 min.)

2. WELCOME, OPENING RITUAL, AND FOLLOW-UP FROM THE FIRST MEETING (15 min.)

- a. **Welcome participants to the second giving circle meeting.** Kick-off the conversation with a brief overview of this meeting's agenda. Explain that this meeting will focus on the following:
 - Exploring the issues your group cares about.
 - Identifying the mission, or what you hope your giving will accomplish.
 - Prepare for your grantmaking process.

- b. **Hold your opening ritual/ice-breaker.** You may have some new members at this meeting. Allow extra time for anyone who missed the first meeting to introduce themselves and share why they've joined the giving circle.

» **Amidah-style ice-breaker:**

- Ask if anyone can share what the Amidah is, make sure the group knows that the Amidah is the core of every Jewish worship service. It refers to a series of blessings recited while standing. Learn more about the Amidah [here](#).
- Share that while the Amidah changes based on whether we are reciting it on weekdays, shabbat, or holidays, it includes portions that express our awe “wow!” our gratitude, “thanks!”, and hope for a better world “help” or “please.”
- Go around and share something that makes you say “Wow!”, something for which you are grateful (“Thank you!”) and something for which you are seeking “help” or ease.

- c. **Revisit the shared values that the group identified during the first meeting.** These will steer this meeting and all decision-making. Today, you’ll be putting these values into practice by articulating mission and vision statements that will guide your group’s decision-making. Explain that in this conversation, the group will be putting together three major pieces of the puzzle that will result in the mission and vision statements that will guide your giving agenda.

- Your group’s shared values
- The funding areas your group most wants to support
- Your initial assessment of pressing needs in the community you hope to affect with your giving

3. FOCUS AREA AND MISSION CONVERSATION (35 min.)

a. **Define focus and mission.**

By the end of this conversation, you will have articulated a mission, including a focus area for your grantmaking, which is critical for the circle’s self-understanding and your ability to explain to others. A mission connects to your values but states more explicitly what your work is.

- **Definition of Mission:** Describes our purpose – what we do and how we do it.
- Sample mission statements: *“Our mission is to promote educational excellence and affordability”; “Our mission is to expand access to programs that combat the root causes of homelessness.”*

NOTE: If this giving circle is being run through an organization (Federation, JCC, Synagogue, Other), you might pre-determine the funding area options in advance based on what your organization funds. Make the focus area choices broad enough that there are meaningful funding choices to be made within each category. Then, you can present the possible focus areas to the group for them to choose from, rather than having them pick from everything under the sun and landing on something your organization does not support.

b. Uncover individuals' funding area interests and align on shared areas.**Option 1:**

Use the [Amplifier Giving Panorama issue area poster](#) (See [reference sheet 2.0](#) on page 55) to identify individual participants' top and bottom 3 funding area interests. You can do this in many ways, including:

Print out copies of the Amplifier Giving Panorama poster for participants so they can easily identify their top and bottom areas of funding interest. If you would like to print in a full-size poster, contact Amplifier and we will send you the full version and print guidelines.

Option 2:

Generate a list of possible funding areas on your own or with your participants, writing them on a whiteboard or Flipchart. Then, ask participants to put stickers or post-it notes with different colors representing the areas that are most and least important to them.

c. Discuss possible focus areas.

- Regardless of which approach you take, spend some time asking a few participants to explain why they chose those specific focus areas.
- Identify overlaps in interest to determine where there is the most alignment in the group — especially around areas on which they want to focus. Then, list these top items for everyone to see on a flipchart or whiteboard.

FACILITATION TIP:

Use the areas participants are not interested in focusing on to help guide the group towards consensus. The goal is not unanimity. Rather it is to find a focus area everyone is ok with. Even if many people are very excited about a focus area if one or two people are strongly against it, that focus should be removed from the running.

- If you haven't done so yet, pull in your values and ask how they apply to the interest areas for your giving.

Break (10 minutes)

PART 2 | CRAFTING A MISSION



Duration: 30 minutes

1. BRING IT ALL TOGETHER (15 min.)

Use consensus or vote to decide which issue area the group will pursue. It will be difficult to decide on just one area, but the more focused your issue area is, the more impact you can have, and the more efficiently you will spend your members' time.

2. CRAFT MISSION STATEMENTS (15 min.)

a. To inform the writing, discuss the following questions as a group. (5 min.)

- **Vision:** If we succeed, what will be different, and for whom? Remember to think about your circle's impact both on members and on grant recipients. What will our community look like thanks to our efforts?
- **Mission:** How do we think we can most effectively intervene to enable this change?...by funding what issues and types of organizations?
- **Values:** How do the group values we articulated in our last conversation connect to and inspire our vision and mission?

b. Begin crafting your statements.

Use the Mission, Vision, and Values: Worksheet and Samples resource for writing templates and examples to help facilitate writing.

FACILITATION TIP:

If you are running over on time you can skip this step and simply say that your mission is, "to fund organizations working [insert your focus areas] informed by [insert your values]."

NOTES

PART 3 | PREPARING FOR THE GRANT-MAKING PROCESS



Duration: 10 minutes

Now that you know what your circle will and won't fund, the next step is to find eligible candidates for your donation. Here, you'll inform the group about the process of identifying potential donation recipients. An outline of the process is below for you to share:

1. PROCESS FOR REMAINING MEETINGS

■ Between Meeting 2 and Meeting 3:

- Invite participants to make organization suggestions and email the group leaders. We encourage you to look for smaller organizations that are less known, but doing great work. Ask your networks and do some research!
- You, the leader, will review suggestions and prepare organizational profiles (we like to call it a docket) for each organization to review at the next meeting. See Reference 2.1 at the end of this section for examples.

FACILITATION TIP:

Pick a deadline for submissions that gives you enough time to nudge participants for their submissions and create the docket. You'll need a few working days to create the docket.

■ At Meeting 3:

- The group will learn more about best practices in giving, learn more about the grantees, and whittle down the list to a group of finalists.

■ At Meeting 4 (last meet up):

- The group will make a final decision on the grant recipient and reflect on the entire giving circle process.

PART 4 | CLOSING



Duration: 10 minutes

1. REFLECTION AND NEXT STEPS

End with any needed action steps and some reflection if desired.

- a. What needs to be done next, if anything? By what date? Who will do it?

TIP:

Remind participants of the homework: researching organizations in the focus area and sending them to the leaders by the deadline.

- b. Remind the group when and where the next session will be, and let them know that you'll be sending a reminder email that will explain what the discussion topic will be for the next meeting and recap this meeting.

2. CLOSING RITUAL

Have members read the following *drash* (interpretation of a text or tradition) on the end of Shabbat by Rabbi Michael Uram before going around and reflecting on points of light from the meeting.



“Shabbat ends at a moment called “tzeit ha-kochavim” or the appearance of three stars in sky. We might have expected the rule to be that we simply wait for sky to turn black, but instead, Judaism asks us to search the darkness around us until we can find three bright spots in the sky.

If darkness is seen as a metaphor for all the challenges in our lives and for all of the brokenness and injustice in our world, then this peculiar ritual reveals itself as profound teaching about how to begin each week in a world that is not yet perfect.

Rather than simply gazing into the darkness, which might feel overwhelming or insurmountable, we instead begin each week by finding three points of light, three aspects of our lives and the world around us that are good—three point of light on which we build a more meaningful life and a more perfected world.”

– Rabbi Michael Uram, Chief Jewish Learning Officer, JFNA

3. SPEND SOME TIME SOCIALIZING... AND EATING!

Post-meeting Action

1. Send an email to participants with a summary of the second meeting and a reminder for the next one.
 - a. Ask the note-taker to share their notes with you to craft the summary.
 - b. Remind participants of the next meeting date, time, and location.
 - c. Feel free to use the email template below as a template.

SUBJECT LINE: Giving circle Meeting #2 Recap + Upcoming Meeting on *[date]*

BODY:

Hi *[recipient first name]*,

Thank you so much for attending our second giving circle meeting! Digging into our vision and mission for our giving circle was extremely valuable, as was beginning to whittle down our interest areas for funding. We covered a lot, so below, please find a summary of the highlights.

[link to a summary document or paste key points here]

As discussed at the end of our meeting, please send me grant recipient suggestions by *[X/XX]*.

I'm excited to continue our conversation at our third meeting on *[date]* at *[time]* at *[location]*. At this session, we'll discuss the first round of potential grant recipients, refine the list, and select finalists.

Please let me know if your plans have changed or if you have any questions. Thank you again for your meaningful participation!

Best,
[your name]

2. Begin reviewing the **Third Meeting Facilitation Guide: Learn about grant recipients and select finalists** so you can begin preparing for another productive session with your giving circle!

FACILITATOR "HOMEWORK"

PRIOR TO MEETING 3

Create the list of potential grantees, combining your own programs/organizations with suggestions from participants. Request that participants send you suggestions by a deadline. You'll need a few days to review the organizations, ensure they align with the giving circle's mission, and create organizational profiles (we like to call it a "docket") for the next meeting. You should be prepared to share your docket at your next meeting.

PREPARING THE DOCKET

The docket features each program or organization between which the giving circle will be deciding. **This will take several hours of research plus a few more hours to compile so give yourself adequate time.** Ideally you will have 5-10 programs, organizations, or even possible new projects to fund that align with your group's identified focus area. Create a document that presents each possible grantee with comparable information.

A sample docket is available at this [link](#). An additional example is shown on page 56 ([reference sheet 2.1](#)) with a version available for editing at this [link](#).

Be sure to include:

- ✓ Name of the organization/program/project
- ✓ Basics about the organization/program/project
- ✓ Type of work and how the work is or will be done
- ✓ Any alignment with giving circle's focus area
- ✓ Budget or size of organization or program if known/applicable
- ✓ Website or additional links if they exist

TIPS FOR RESEARCHING ORGANIZATIONS WITH YOUR GIVING CIRCLE MEMBERS

■ THE APPEARANCE OF AN ORGANIZATION'S WEBSITE DOES NOT REFLECT THE QUALITY OR IMPORTANCE OF THEIR WORK.

There are many organizations that run lean operations, focusing their efforts on projects rather than their digital presence. Conversely, there are organizations that may have a very impressive online presence, but might not represent the values you want your giving to reflect. Try to look beyond the organization's website and social media. What are other, reliable sources saying about them? Are you familiar with their work? Are other organizations mentioning or linking to them?

■ START WITH THE MOST VALUABLE (AND QUICKEST) INFORMATION.

Mission and vision statements:

Mission and vision statements are often the quickest way to understand the values of an organization. They identify the problem an organization is working to solve; they're the "why" behind the work of the organization.

Program areas and projects:

Look for the projects or program areas an organization works on and any information on how they do their work. Projects are the "how" of an organization. Some questions to consider when looking at an organization's projects are: Who are the stakeholders being engaged? Is anyone missing? What is the scale of these projects? What are the strategies being used?

Size of the organization:

Depending on how much money your giving circle is planning to distribute, the size could make a difference in your decision making. Here are some questions to consider: How many staff members does the organization have? What is their annual budget? What is their reach/impact?

■ CONSIDER WHAT THE ORGANIZATION NEEDS

Does the organization indicate where it needs support (general operating support, restricted funds, specific projects)? How might your money have the best impact on this organization, so that it can thrive, be more sustainable, and better reach its goals?

Reference Sheet 2.0 | Amplifier Giving Panorama document

Use the poster below to facilitate your focus area conversation. Printable version available at this [link](#). If you are running this with a Federation, you can download a poster with Federation-specific issue areas [here](#).

AMPLIFIER

Issues that drive my giving...

Place a dot next to the issue areas that drive your giving.

Antisemitism	Social Justice	LGBTQ+
Disabilities	Disaster Relief	Education
Environment	Health	Israel
Women + Girls	Poverty	Social Services
Science and Research	Jewish Peoplehood	Other

Reference Sheet 2.1 | Sample Organizational profile/ page of docket

[Version available for editing at this [link](#).]

Sojourn (Southern Jewish Resource Network for Gender and Sexual Diversity)

Website: sojourngsd.org

Demographic: LGBTQ

Location: Atlanta

Year Founded: 2001

Program Summary: SOJOURN was founded in 2001 as The Rainbow Center. Supported by the Jewish Federation of Greater Atlanta, it was a central point to promote change and inclusion for LGBTQ+ Jews and people of all faiths throughout metro Atlanta. In 2013, the Rainbow Center was renamed SOJOURN: the Southern Jewish Resource Network for Gender and Sexual Diversity. SOJOURN remains committed to growing and expanding educational programming, outreach, and advocacy through the South, both in the Jewish and general communities. Their website and social media continue to be a destination for support and resources for LGBTQ people and their families. They have reached over 20,000 people since our inception and have organized the Jewish community at Pride to increase solidarity, partnerships, and inclusion.

SOJOURN's programs include:

- Welcoming Communities Project helps regional synagogues, schools, agencies, and entire communities become welcoming places for GSD (Gender and Sexually Diverse) Jews in both theory and practice.
- SOJOURN-Keshet Shivyon cohort supports Jewish organizations in the Southern U.S. on their journeys to greater gender and sexual diversity. The yearlong program will work with Jewish organizations in the South to build or support an LGBTQ+ equality working group.
- Sex Ed Queeries offers supplemental sex ed. People often turn to progressive Christian denominations to ensure that teens are learning about sexuality in a way that is healthy and queer-inclusive – and SOJOURN is committed to providing this education from a perspective grounded in Jewish values.
- SOJOURN offers a group for parents of gender-expansive children and runs programs for anyone who spends time with young children, such as Jewish preschools, day schools, Hebrew schools, camps, or parent groups.

Impact Area: Education, Advocacy, Community Building

Capacity: Their team includes four professionals



AMPLIFIER'S GIVING CIRCLE IN A BOX
AGENDA AND FACILITATION GUIDE

MEETING 3

POTENTIAL DONATION RECIPIENTS



FACILITATION GUIDE: THIRD MEETING

Learn about grant recipients & select finalists



Duration: 2 hours

The Basics

GOAL:

The goal of this third giving circle meeting is to continue building community, put the values, mission, and vision into practice by learning about the possible donation recipients, and create a list of finalists.

Preparing for your Meeting

IN ADVANCE OF THIS MEETING

- Complete the “homework” described at the end of the Second Meeting Facilitation Guide and close out any other follow-ups from the previous meeting.
- Create the list of potential grantees (docket), combining your own programs/organizations with suggestions from participants. Request that participants send you suggestions by a deadline. You’ll need a few days to review the organizations, ensure they align with the giving circle’s mission, and add them to the docket.
- Read through this facilitation guide. Carefully review this guide to understand the meeting purpose, core sections, timing, and meeting logistics.
- Share the full docket in advance of this meeting so that participants have some time to review and are not looking at it for the first time at the meeting. Be sure to include:
 - ✓ Name of the organization/program/project
 - ✓ Basics about the organization/program/project
 - ✓ Type of work and how the work is or will be done
 - ✓ Any alignment with giving circle’s focus area
 - ✓ Budget or size of organization or program if known/applicable
 - ✓ Website or additional links if they exist

MEETING VIRTUALLY? HERE ARE SOME TIPS:

1. Use a virtual meeting platform — one of our favorites is Google+ Hangouts, Google’s free video-chat platform, or Zoom.
2. Host at least one “test” session before your first meeting to work out any technological kinks.
3. Be sure your members have access to all of the documents they’ll need so you can read and review them together. We recommend sending links to any documents by email in advance.

WHAT YOU'LL NEED FOR THE MEETING

- **A meeting space :** Meetings can be held anywhere – a member’s home or office, a park, or even a restaurant/cafe/bar. Be sure the space is conducive to the kind of conversation you’d like to have, and that everyone in the group will be able to see and hear each other.
- **A note-taker:** A note-taker: Make sure someone is jotting down important decisions, next steps, and assignments — no need to go crazy recording every word!
- **Supplies:**
 - ✓ For collaboration/note-taking: we recommend a flip chart, whiteboard, paper, writing utensils.
 - ✓ Name tags in the event that folks don’t already know one another.
 - ✓ Copies of [this article](#) for everyone (the article is on page 66)
 - ✓ Copies of the organizational docket you’ve prepared
- **Food and drink:** A must!

Pre-meeting Communication with Participants

We recommend sending a **pre-meeting reminder email** to participants in advance of this second meeting. Feel free to use the email template below as a starting point:

SUBJECT LINE: Giving circle Meeting #3 on [date] — we can’t wait to see you!

BODY:

Hi *[recipient first name]*,

I am excited to see you at our second giving circle meeting on *[date]* at *[time]* at *[location]*.

The goal of our third meeting is to continue building community, put the values and mission into practice by learning about the grantees, and create a list of finalists. To do this we will be learning a bit about best practices in giving and reviewing the organizations to which we might give. Please read this article, which we will be discussing before our meeting, and review the list of organizations we might fund *[attach or link docket]*.

This will be an exciting and rewarding meeting — a result of the hard work and thoughtfulness this group has contributed during our first two sessions.

Please let me know if your plans have changed or if you have any questions. See you soon!

Best,
[your name]

Agenda at-a-glance

Your third Giving circle meeting will be about 2 hours in duration. Below is a high-level overview of your agenda.

PART 1 Grantmaking best practices (50 min.)

BREAK (10 min.)

PART 2 Reviewing the organizations and presenting finalists (60 min.)

Meeting Agenda

PART 1 | GRANT-MAKING BEST PRACTICES



Duration: 50 minutes

1. ARRIVAL AND SOCIAL TIME (10 min.)

2. INTRODUCTIONS AND OPENING RITUAL (15 min.)

- a. **Welcome participants to the third giving circle meeting.** Kick-off the conversation with a brief overview of this meeting's agenda.

"Suggested script: Today, we'll be putting the mission and values identified in previous sessions into practice. We'll spend time learning about giving/grantmaking best practices and grantees, and narrow down to a list of finalists."

- b. **Open the floor for follow-ups from the last meeting.** Give members the opportunity to share any pressing thoughts about the circle that have arisen since the last meeting.

c. Hold your opening ritual/ice-breaker.

» *Amidah-style ice-breaker:*

- Ask someone to remind the group about the three parts of the Amidah from the last meeting. ([See page 47](#) from Meeting 2 for the full ice breaker introduction).
- Go around and share something that makes you say “Wow!”, something for which you are grateful (“Thank you!”) and something for which you are seeking “help” or ease.

NOTE: See [reference sheets](#) at the end of the Meeting 1 Facilitation Guide (pages 38-40) for additional options for opening or closing rituals.

3. GRANT-MAKING BEST PRACTICES (25 min.)

a. Define focus and mission. (5 min.)

Introduce this section by stating that donating money and grantmaking have a long history and it can be done in ways that further our goals and ways that harm them. We’re going to dive into just one perspective on grantmaking best practices and consider what it might mean for our giving circle.

- Remind the group that you will be donating by picking an organization and making a donation without a request for proposal or grant application process.
- If your giving circle is a part of an organization that makes grants (such as a federation) you can share about your model here or after the discussion.

b. Pass around the [article](#) you emailed in advance and give people a chance to refresh their memories (or read it if they hadn’t in advance)

c. Break participants into small groups to discuss the following questions (15 min.)

- How does the article intersect with our group values and mission?
- What insights does this article offer to our funding strategy, if any?

Break (10 minutes)

PART 2 | LEARN ABOUT THE ORGANIZATIONS AND SELECT FINALISTS



Duration: 60 minutes

1. REVIEW THE ORGANIZATIONS (50 min.)

- a. Share the organization docket you've prepared with the group so that everyone can learn a bit about each potential grantee. Ideally share this with them via email in advance, but also bring copies for each member.
- b. If your docket is long (more than six organizations) or participants did not have a chance to review organizations before the meeting, split participants up into groups of three or four and assign each group four organizations to review. It is ok that multiple groups will have the same organizations. Otherwise stay in a large group.

IF YOU ARE IN SMALL GROUPS:

- Have each group review their organizations and note for themselves which are aligned with the mission and values of the giving circle.
- Have a conversation about the organizations, their work, and alignment with the giving circle priorities to select 1-2 organizations to move forward as finalists.
- Bring the small groups together and invite each group to present their finalist organization(s) to the full giving circle.

FACILITATION TIP:

Invite one representative from each group to pitch the group's organization to the room.

Take notes, marking the finalists for each group. Leave time for questions from other groups.

IF THE GROUP DOES NOT SPLIT UP:

- Give participants an opportunity to review the docket and note for themselves whether they think each organization is well aligned with the giving circle's mission and values.
- Open up a conversation about which organizations, if any, may not be a good fit and are easily pulled from the list.
- Discuss which organizations are a good fit for the donation.
- Help bring the conversation to consensus on which 2-4 organizations are best aligned with the values and mission of your giving circle. Let the group know you will be selecting grant recipients at the final meeting to give everyone ample time to reflect and consider.

2. NEXT STEPS & CLOSE (10 min.)

a. Reflection and next steps.

End with any needed action steps and some reflection: Inform the group when and where the next session will be, and let them know that you'll be sending a reminder email that will explain what the discussion topic will be for the next meeting and recap this meeting.

b. Closing ritual: Take five minutes to complete the closing ritual, identifying points of light coming out of the meeting. (For a refresher on the exercise see facilitation guides for meetings 1 and 2).

c. Socialize: Spend some time socializing...and eating!

NOTES

Post-meeting Action

1. **Send an email** to participants with a summary of the third meeting and a reminder for the next one.
 - a. Ask the note-taker to share their notes with you to craft the summary.
 - b. Remind participants of the next meeting date, time, and location.
 - c. Remind participants to get in touch with their organization.
 - d. Feel free to use the email template below as a template.

SUBJECT LINE: Giving circle Meeting #3 Recap + Upcoming Meeting on *[date]*

BODY:

Hi *[recipient first name]*,

Thank you so much for attending our third giving circle meeting! We made incredible progress in our process by putting our values, mission, and vision into practice to learn about potential grantees, and define a list of finalists. We covered a lot, so below, please find a summary of the highlights.

[link to a summary document or paste key points here]

As discussed at the end of our meeting, please send me grant recipient suggestions by *[X/XX]*.

I'm looking forward to our final meeting on *[date]* at *[time]* at *[location]*. At this session, we'll hear finalist presentations, identify a grantee, celebrate the process, and close with intention.

Please let me know if your plans have changed or if you have any questions. Thank you again for your meaningful participation!

Best,
[your name]

2. Begin reviewing the **Fourth Meeting Facilitation Guide: Identifying a grantee, celebrating and closing** so you can begin preparing for another productive session with your giving circle!



PRIOR TO MEETING #4

As the Facilitator, you'll need to decide how you want to feature finalists. You can either use your existing docket and shorten it to include only the finalists, or invite outside speakers to come speak about the finalists.

- a. **Using existing docker:** Create brief docket-style organizational profiles for the finalists that describe the work of the organization, its relationship to the mission and vision of the group, and data related to the priority impact areas your giving circle has identified (e.g. the budget, organization size, community served, etc).
- b. **Inviting outside speakers:** If bringing in outside organizations is simple or you're using internal projects, then feel free to invite people to speak to the group. Invite organizations to present in-person, virtually, or via a pre-recorded presentation at your final giving circle meeting.

NOTE: If you select this option, be sure to share the presentation timing parameters with the organizations. Live presentations should be approximately four minutes with an additional four minutes for questions.

NOTES

This image shows a blank sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

Reference Sheet 3.0

Philanthropic Agency: The Next Model of Trust-Based Philanthropy for Everyone

Stephen Kump is co-founder and CEO of [Charityvest](#). Find him on [LinkedIn](#) and follow him on [Twitter](#).

Download and print [here](#) (this article is referenced on page 59 under item three)

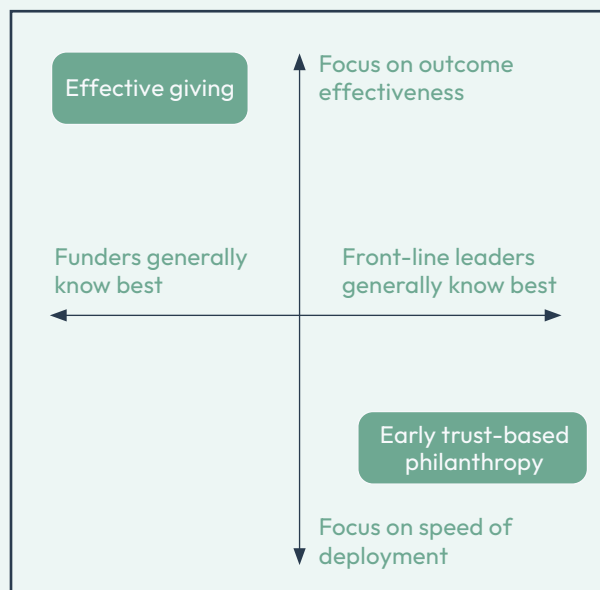
At the Gates Foundation Greater Giving Summit last spring, there was a hearty discussion about how we leaders in philanthropy should approach our work with a stronger equity lens. The conversation highlighted how methods used to pursue greater impact in recent decades have either reduced or not improved equity. The data shows that black-founded nonprofits, for instance, are still much less likely to receive funding, all things equal. Trust-based philanthropy, the essential role of proximate leaders, collaborative philanthropy, and other concepts were discussed as ways to foster equity.

This is reflective of the broader discussion in the philanthropic industry: the tension between the “effective giving” paradigm of the last few decades and the emerging “equity” paradigm most prominently represented by trust-based philanthropy.

Here, I’d like to explore the tension between the effectiveness and equity paradigms and highlight forthcoming new tools that we at Charityvest believe will foster the integration of the best parts of both through a new model I’m calling, “philanthropic agency.”

DECONSTRUCTING WHAT IS HAPPENING IN PHILANTHROPY RIGHT NOW

“Effective giving” has been dominant over the last 20 or so years, characterized by an emphasis on monitoring, evaluation, restricted grantmaking, and other top-down nonprofit management tactics. Trust-based philanthropy starts with a sweeping critique against the assumption that grantmakers “know best” and can coax nonprofit leaders toward greater impact through measurement and milestones. In contrast to effective giving, it calls for trust in nonprofit leaders as those who know best, putting resources in their hands boldly and quickly without strings or hoops.



Putting these two industry trends into a visual on their basic assumptions, effective giving moved funders into the top left of this chart, and trust-based philanthropy is currently moving many to the bottom right.

Reference Sheet 3.0

THE POTENTIAL PITFALLS OF TRUST-BASED PHILANTHROPY

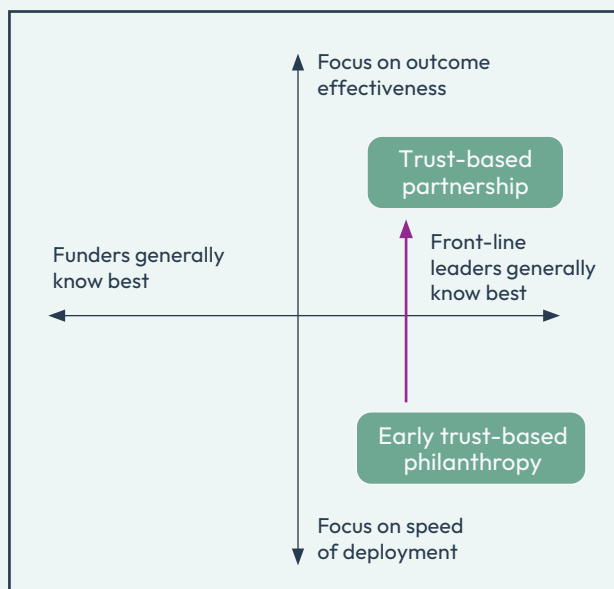
I’ve heard several nonprofit leaders speak ironically about a problem popping up regarding trust-based philanthropy: equity. Some forms of trust-based philanthropy, à la Mackenzie Scott, where grantees are picked in a not-very-transparent process can leave nonprofit leaders confused as to who is getting funding from grantmakers, when, and why.

At the Gates Greater Giving Summit, many proximate leaders who spoke applauded the shift in focus away from burdening nonprofit leaders with funding hoops, but they also mentioned how they felt like funders were not seeking to deeply understand and learn what’s important to their organizations, and therefore weren’t seeing the same impact opportunities on the same timelines. The potential dark side of trust-based philanthropy is a pullback from seeking understanding, proximity, and relationship.

What nonprofit leaders want is a trust-based partnership. They want to know their financial partners understand the essentials of the complexity they face in creating impact, so resources can dynamically flow to what’s effective in line with opportunities. They want resources now, but they also want to feel they have partners who will be there to resource critical future opportunities, too. Building partnership around long-term effectiveness is critical.

For these reasons, I’d make the case that the top-right quadrant is actually the most sustainable. It puts nonprofit leaders in the driver’s seat on the path to impact, but

also puts a learning mandate back on funders. Ultimately, this fosters partnership. And there are many who are incorporating robust learning in the definition of what “good” trust-based philanthropy looks like.



IN PURSUIT OF SCALABLE TRUST-BASED PARTNERSHIP AND PROXIMITY: AGENCY

It needs to be noted, trust-based grantmaking done well is not easy. Listening, learning, and acting in partnership requires thoughtfulness, good relationships, and attention. That requires time. Done poorly, it puts time overhead on nonprofit leaders, too. A single grantmaker can’t build close partnerships with 20 organizations, nor can a nonprofit leader have 20 funders requiring their time to “learn.” How, then, do funders achieve proximity at scale without putting time and attention burdens back on the organization?

Philanthropy advisors can help funders move up the Y axis on the chart with greater scale, but a new model is needed to help funders increase their proximity without burdening nonprofit leaders.

Reference Sheet 3.0 | Article 2



“Philanthropic agency” can do this.

Akin to donor collaboratives, philanthropic agency calls for funders to relinquish their grantmaking rights and place trust in someone (an agent or agents) who has an impact-oriented mind and is partnered with organizations “on the ground.”

Moving to philanthropic agency can take various forms:

- Donor collaboratives with the decision-makers as proximate experts/leaders
- Setting up sub-funds and giving grantmaking authority to proximate leaders/experts
- Giving money to another funder who has more proximate partnerships in place

Perhaps a crude comparison, but information asymmetry and relationship costs are why venture capital exists in the for-profit funding landscape. Relationships, understanding, and partnership are needed at a fairly granular level to make high-quality investment decisions. Investors place “general partners” (agents) in charge of making all these decisions because they are more

proximate to particular industries and issues and have time to build deeper relationships. They hold them accountable to performance and ethics, but these agents have full agency in deploying resources.

Philanthropic agency is similar. It empowers an agent with full decision-making authority and a mandate to build close relationships with partners in order to deeply understand their long-term needs and become a responsive, trusted, and dynamic partner.

THE DAWN OF PHILANTHROPIC AGENCY AT SCALE

Flavors of agency in philanthropy have been around for a long time. Foundations hire program managers who may have limited agency, The United Way aggregates donor money and grants on behalf of the community, and organizations like GiveWell select top-performing charities on behalf of their donors.

But until now, agency has been held back because of the expense of setting up these funding structures and the complications of maintaining trust.

That’s changing. In the coming years, the flexibility of donor-advised funds and technology are creating opportunities for funders large and small, personal and institutional, to create pools of charitable money in tax-deductible funds and name anyone as a co-grantmaker on the fund. At Charityvest, we’ve launched [Community Funds](#), which can be hosted on public or private weblinks where the track record of the fund is completely transparent to anyone who has access.

We believe that philanthropic agency has the potential to solve the effectiveness and trust

Reference Sheet 2.1 | Sample Organizational profile/docket

tension felt in the philanthropic world right now in a scalable way, increase equity through proximate decision makers, and increase the velocity of giving out of DAFs and private foundations, as funders may feel it easier to place their money in the hands of an agent faster than giving to individual organizations. Most importantly, it has the potential to increase the fun of giving as agents bring stories, foster relationships, and report on impact back to funders at a rate and scale they could not on their own.

What hangs in the balance is a more flourishing world. ■

The rich and the
poor meet together;
God is the maker
of them all.

Proverbs 22:2





AMPLIFIER'S GIVING CIRCLE IN A BOX
AGENDA AND FACILITATION GUIDE

MEETING 4

AWARDING THE DONATION & REFLECTION



FACILITATION GUIDE: FOURTH MEETING

Identifying a grantee, celebrating, and closing



Duration: 2 hours

The Basics

GOAL:

The goal of this fourth and final giving circle meeting is to identify a grantee, celebrate the process, and provide a meaningful closing to the group.

Preparing for your Meeting

IN ADVANCE OF THIS MEETING

- Complete the “homework” described at the end of the Third Meeting Facilitation Guide and close out any other follow-ups from the previous meeting.
- Read through this facilitation guide. Carefully review this guide to understand the meeting purpose, core sections, timing, and meeting logistics.

WHAT YOU’LL NEED FOR THE MEETING

- **A meeting space :** Meetings can be held anywhere – a member’s home or office, a park, or even a restaurant/cafe/bar. Be sure the space is conducive to the kind of conversation you’d like to have, and that everyone in the group will be able to see and hear each other.
- **A note-taker:** A note-taker: Make sure someone is jotting down important decisions, next steps, and assignments — no need to go crazy recording every word!
- **Supplies:** For collaboration and note-taking, we recommend a flip chart, whiteboard, loose paper, and writing utensils. Bring the docket with organizational profiles for your finalists if this is how you have chosen to present them (see [homework](#) from the third meeting guide) and nametags for presenters if you have chosen to bring in outside guests to present on the finalists.
- **Food and drink:** You will be celebrating the process this time and closing up your giving circle, so bring drinks for a toast and special snacks that will add to the excitement.

MEETING VIRTUALLY? HERE ARE SOME TIPS:

1. Use a virtual meeting platform — one of our favorites is Google+ Hangouts, Google’s free video-chat platform, or Zoom.
2. Host at least one “test” session before your first meeting to work out any technological kinks.
3. Be sure your members have access to all of the documents they’ll need so you can read and review them together. We recommend sending links to any documents by email in advance.

Pre-meeting Communication with Participants

We recommend sending a **pre-meeting reminder email** to participants in advance of this second meeting. Feel free to use the email template below as a starting point:

SUBJECT LINE: Our final Giving circle meeting on [date] — we can't wait to see you!

BODY:

Hi *[recipient first name]*,

I am excited to see you at our fourth and final giving circle meeting on *[date]* at *[time]* at *[location]*.

In this last meeting we will identify a grantee, celebrate the process, and close out with intention. This has been a meaningful and productive journey — and I'm thrilled to see our collective hard work come together.

Please let me know if your plans have changed or if you have any questions. See you soon!

Best,
[your name]

Agenda at-a-glance

Your fourth giving circle meeting will be about two hours in duration. Below is a high-level overview of your agenda.

PART 1 Meet the finalists and identify your grant recipient (70 min.)

BREAK Celebratory break! (20 min.)

PART 2 Reflecting on the process (20 min.)

PART 3 Closing and appreciation (10 min.)

Meeting Agenda

PART 1 | REVIEWING THE FINALISTS AND SELECTING A GRANT RECIPIENT



Duration: 70 minutes

1. ARRIVAL AND SOCIAL TIME (10 min.)

2. INTRODUCTIONS AND OPENING RITUAL (10 min.)

- a. **Welcome participants to the fourth giving circle meeting.** Kick-off the conversation with a brief overview of this meeting's topic. Share that today, you'll hear presentations from finalists and award a grant recipient.
- b. **Open the floor for follow-ups from the last meeting.** Give members the opportunity to share any pressing thoughts about the circle that has arisen since the last meeting.
- c. **Hold your opening ritual/ice-breaker.** See the [Second](#) and [Third](#) Meeting Facilitation Guide if you need a refresher on the Amidah-style ice-breaker.

3. REVIEWING THE FINALISTS AND SELECTING A GRANT RECIPIENT (50 min.)

a. Reviewing the finalists.

- Give your participants the opportunity to review each of the finalist grantees.
- Review each organization's docket for 3 minutes each, and provide an additional 5 minutes for your members to discuss their ideas, questions, and thoughts in pairs or small groups.
- If you have outside presenters: Give each finalist four minutes to present and leave four additional minutes at the end for questions (8 minutes total per finalist)

FACILITATION TIP:

Arrange sequential presentations and assure that organizations do not see other organizations' present.

b. Identifying your grantee.

- **Facilitate a conversation.** After the finalists have been reviewed, have a conversation with your participants. Use the following questions to guide your discussion:
 - » Are there any general questions about the dockets or live presentations?
 - » Do you feel that the finalist organizations meet the giving circle's grant priorities?
 - » If the group identifies any organizations that do not fit, ask if participants would like to have the organization removed from the running. If members of the group feel strongly that an organization should receive the grant, they likely shouldn't.
 - » Which of the finalists seem like the best fit for the grant?
- **Come to a consensus.** After you facilitate the conversation above, your group may already arrive at a natural decision on your grant recipient. If that's the case, skip to the celebration! If not, see our suggestions below on how to come to a consensus.

COMING TO CONSENSUS:

Remind the group of its mission and values. The goal is to come to a mutual decision even if it's not an individual's top choice. Then move to a thumbs "up" or "down" vote system. **For each finalist, do the following:**

- Ask the group, "Is anyone highly opposed to selecting this organization? Would you pull your funds if the grant were awarded to them?"
- If anyone is absolutely opposed, move on to the next organization. If no participant is opposed, but there is no clear front runner, vote on all remaining finalists.
- If there's a tie, eliminate any lower vote getters and repeat. If you are still tied or there are only two organizations, keep talking.
- Once you have a top vote getter, confirm that no one is opposed. If everyone affirms, you have arrived at consensus!

Celebratory Break (20 minutes)**Time to Celebrate!**

Make it special! Now that your giving circle has officially selected a grant recipient, announce it loudly with the grant amount and celebrate. Applaud, cheer, pump up the music, or raise a glass — anything festive to mark this exciting moment! And don't forget to come prepared with some extra celebratory snacks.

PART 2 | REFLECTING ON THE PROCESS**Duration: 20 minutes****1. REFLECTION CONVERSATION (20 min.)****a. While today's decision was exciting, it's important to reflect on the entire process. (5 min.)**

During the last four meetings, you and your giving circle have been on a journey! From identifying shared values and crafting a collective mission, to identifying potential grantees. And today, hearing from and about finalists and making a decision. You've also built relationships and community along the way.

b. Break up into small groups to hold reflection conversations. (10 min.)

Ask each group to discuss the following questions:

- ✓ What did you learn from the giving circle process?
- ✓ What insights/learnings did you uncover about yourself, your community, or philanthropy in general?
- ✓ What's something different you will do philanthropically in the future?

c. Come back together and share. (5 min.)

Ask each small group to share a few of the learnings and reflections discussed.

PART 3 | CLOSING AND APPRECIATION



Duration: 10 minutes

a. Share an appreciation.

Go around the room and ask participants to share an appreciation or something they are grateful for. Start by offering something that you are feeling grateful for at the moment and then open it up for others to share a moment of gratitude.

b. Share next steps for informing and sending the grant to the selected organization.

A lot of excitement has been built over the grantee, and participants will be eager to know how and when the organization will learn about their grant! Share these next steps with the group.

c. Get a sense of what's next for your Giving circle.

Take the pulse of the group. Is this something they would like to do again? Would they change it in any way? Hopefully they had a meaningful giving circle experience and would like to keep the group going!

d. How to stay involved.

If you are facilitating as an organization, share how members of the giving circle can stay involved. Consider planning a social event for the group to stay connected or delegate the planning to a member who is excited to stay involved!

NOTES

Post-meeting Communication with Participants

Send an email to participants thanking them for their participation in the giving circle. Feel free to use the email template below as a template.

SUBJECT LINE: We did it! Thank you for participating in our giving circle.

BODY:

Hi *[recipient first name]*,

Thank you so much for participating in our giving circle! Over the course of four meetings, we identified shared values, crafted collective mission and vision statements, aligned on areas of interest for funding, and ultimately selected a fantastic organization to award a grant. I'm incredibly grateful for your time and meaningful participation, and I'm proud of what our giving circle accomplished.

I am so thrilled to have made a grant of *[\$X]* to *[insert organization]*. If you would like to learn more about giving rooted in Jewish values, visit the Amplifier, Powered by JFNA site [here](#).

Thank you again,
[your name]

Send an email to the organization that is receiving your donation. Feel free to use the email template below as a template.

SUBJECT LINE: Our giving circle donated to *[Name of organization]*!

BODY:

Dear *[Person at Org.]*,

I'm writing to let you know that our giving circle donated *[\$X]* to *[Name of organization]*! Over the course of four meetings, we identified shared values, crafted collective mission and vision statements, aligned on areas of interest for funding, and ultimately selected *[Name of organization]* to award a grant. We are so grateful for the work that *[Name of organization]* does to *[Insert description here]* and we are proud to support you!

Thank you again,
[your name]



CONGRATULATIONS!
YOU COMPLETED AN
ENTIRE GIVING CIRCLE!

AMPLIFIER IS THRILLED TO
HAVE BEEN ABLE TO HELP YOU
ALONG THIS JOURNEY.

Let us know how it went!

amplifier@jewishfederations.org



For more Amplifier tools and resources, visit www.amplifiorgiving.org

Thank you for using Amplifier's Giving Circle in a Box! We'd love to hear how it went!
Reach out to us: amplifier@jewishfederations.org