



Giving Circle Worksheet

Instructions: Follow along with the [video tutorials](#) and use this worksheet as a guide to strategize your giving circle.

For more resources on giving circles, facilitation, and Jewish values, visit Amplifier's [resource page](#). Not sure where to start? Read [Giving Circle Essentials](#) and [The Case for Federation Giving Circles](#) if you work at a Jewish Federation.

1. Jewish Values:

- a. What values inspire you to create your giving circle?

- b. How will you explore values with your participants and identify the shared values that bring you together?

- c. How will you include Jewish values, learning, reflection or community building in your giving circle?

Check out: [Giving Panorama](#), [Rose Foundation Values Cards](#), [Selected Jewish Texts on Giving](#)

2. Mission, Vision, and Goals:

- a. Who/how will you decide on your giving circle's mission?

- b. What is the mission - both the impact you hope to achieve and the goals for your giving circle as a community?

- c. If your giving circle is at an organization, what is the alignment with the organization's mission?

Check out: [Mission, Vision, and Values worksheet](#), [The Case for a Federation Giving Circle](#), [The Case for a Day School Giving Circle](#)

3. **Giving Circle Meetings:**

- a. How many times will your giving circle meet per cycle? How often? Where?

- b. If you have committees, when and how often will they meet?

- c. Who will plan the meetings? Who will facilitate?

Check out: [Giving Circle Essentials](#), [How Many Meetings](#), [Facilitation Tool](#)

4. **Membership:**

- a. Who will be in your giving circle?

- b. How many people do you hope to have?
 - i. What's the minimum number of participants with which you'd start your circle?
 - ii. Is there a maximum?

- c. Who will lead the giving circle?

- d. What is leadership responsible for?

- e. How will leadership transition?

Check out: [Giving Circle Essentials](#)

5. The money:

- a. How much will each participant contribute?
- b. Are there additional requirements (ie.: operating costs, donating to the annual campaign, volunteering)? How will these be included?
- c. Do participants need proof of donation for tax purposes?
- d. How will you collect participants' contributions?
- e. How will you distribute funds to grantees?

Check out: [Grapevine.org](https://www.grapevine.org) if you need a place to gather money and donate it out

6. Grantmaking process:

- a. What is the possible range of grantees? How/will you contribute to Jewish causes?
- b. How many grants will you make? How big will they be?
- c. How will you identify possible grant recipients?
- d. How will you narrow down the possible grantees to a set of finalists? How will you choose grant recipients?
- e. Will there be any follow-up or communication with grantees?

Check out: [Giving Circle Essentials](#), [Natan Fund's Grantmaking Process](#), [Grapevine.org](#), [Grantmaking Best Practices for Giving Circles](#), [Grantmaking with a Racial Justice Lens](#), [Trust Based Philanthropy](#)

7. Decision making process:

- a. Which decisions will participants make?

- b. How will each of these decisions get made?
 - i. If you will have committees, what committees do you need and what will they be responsible for?

- c. How will you inform participants of their roles and responsibilities, what's already decided and any rules around their decision making?

Check out: [Rose Foundation's Guide to Consensus](#), [Giving Circle Essentials](#)[Text Wrapping Break]

8. Build Community:

- a. What else will your giving circle do together (learn, volunteer, socialize)?

- b. How and when will that happen?

- c. How will you incorporate community building and fun into each meeting?

- d. How/will you engage with the broader Jewish community?

Still have questions or need help troubleshooting your giving circle? Please reach out to Amplifier by emailing Amanda.Shane@Jewishfederations.org.