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](http://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?

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

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.