

Giving Circle Building Blocks

A guide to leading conversations
about Logistics, Values, Mission,
Vision and Focus Areas.



The Jewish Giving Circle Movement

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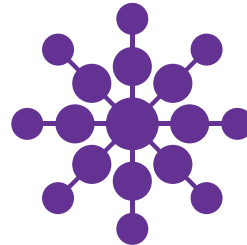
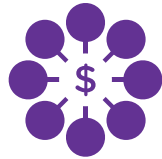
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Welcome!



Welcome to The Jewish Giving Circle Conversation Guide, a detailed guide for holding the critical conversations giving circles need to have as they start up, shift priorities, or simply try to deepen and enrich members' experiences.

The beauty of giving circles is that they take on the values, priorities, and personalities of the groups that start them. There's no one way to run a giving circle, or to hold these (or any) conversations.

What all giving circles do need is a shared set of values and a collective mission to guide the group's decision-making. Your circle brings together people with diverse interests, passions, mindsets, and skillsets. While they won't agree on everything, they share a desire to give together; and creating a common language, culture, and set of priorities will make this easier. On a functional level, articulating shared values and mission will make it simpler for the group to select from a seemingly-infinite number of ways to do good in the world. And on an emotional and psychological level, the more connected your group feels to each other and to the group as a whole, the more meaningful, rewarding and fun the giving circle's activities will be.

We urge you, therefore, not to skip any of these conversations, even if your circle plans to have just a few meetings. Trust us - each of these conversations is critical to building a successful community or network of people who can make effective and meaningful decisions together.

TIPS

We've organized this guide by "Conversation" to enable you to customize it for the preferred number and length of your circle's meetings.

How Many Meetings Does My Circle Need?

will help you decide how to combine these important conversations based on the number of meetings your circle wants to hold and how long your members want those meetings to last.

Group Dynamics, Safe Spaces, and Facilitation

will give you some pointers on how to think about and lead honest, transparent, and sometimes challenging conversations.



What You'll Need



People

A facilitator/circle leader: someone to do the pre-meeting work, lead the conversation, keep track of time, and move the group through the agenda items)

A note-taker: no need to go crazy recording every word; just make sure someone is jotting down the important decisions, next steps, assignments

Participants: prospective and/or existing members.



Supplies

Food & drink: always.

Documents: before you start, have a look at [Giving Circle Essentials](#); [Giving Circle FAQ](#); [Giving Circle Startup Questions](#); [Group Dynamics](#), [Safe Spaces & Facilitation](#) and [Making Decisions: Some Approaches](#).

We've listed additional relevant documents in each Conversation section.

A flip chart, whiteboard, or just some paper: for taking notes

Name tags (if people don't know each other already)



Time

Take as much time as you possibly can to establish a warm, open dialogue between members that values everyone's voices but doesn't waste people's time.

We've offered some sample times for each of these conversations, but each is substantial enough to stretch out to a few hours. How much time you spend will depend on your group's culture and members' time constraints. You can save time by doing some work by email between meetings, creating draft proposals for members to review in person, or establishing some up-front parameters. Don't let the enemy be the perfect of the good: every decision can be revisited and nothing is set in stone.



Place

Meetings can be held anywhere - a member's home or office, a park, even a restaurant/cafe/bar. Make sure the space is inviting, conducive to the kind of conversation you want to have, and that everyone in the group is able to see and hear each other.

Meeting Pointers



At the beginning of every conversation

1 Give people time to socialize, eat, meet new people, and get settled. You might let people know that you've built in this buffer time before the official business starts.

2 Many groups like to start with a short d'var Torah: literally, a "word of Torah" - some thoughts inspired by Jewish texts, holidays, or really anything. See our [How to Create a D'var Torah](#) for some pointers. This is a great way to get people talking about the Jewish values and ideas that underlie your giving circle's work, as well as a thought-provoking - and often moving - way for individual members to share their thoughts, feelings and personal experiences with the group.

At the end of every conversation

1 Leave more time for socializing and eating!

2 If you have time, spend a few minutes debriefing: what worked well and what didn't? What should we do differently next time?

3 Distribute the tasks that need to be done before the next meeting. Be clear about the timing of the task and how involved it is, so that no one gets overwhelmed. Some examples:

- What needs to be done next? And by what date? Who will do it?
- Who will reach out to other prospective members?
- When and where will we meet next?
- What specific content questions need to be answered before the next meeting, and what's our approach for answering those questions?

Between each meeting

1 The note-taker might want to summarize what happened at the last meeting and send the summary around to current and prospective members.

2 Check in with members for one-on-one feedback about how the meeting went for them. Make sure especially to reach out to anyone who seemed reticent or unhappy. Incorporate people's feedback, concerns, and questions into the next meeting.



For Groups Meeting Virtually



There are many ways a giving circle can meet virtually. One of our favorites is **Google+ Hangouts**, Google's free video-chat platform.

The leader can initiate a Hangout and invite circle members to join.

Those with webcams can join with video; others can join by voice only, either on the computer or by phone.

Hangouts are well-integrated with Google Docs, which can make group reading and exercises easy.

TIPS

We recommend doing at least one "test" Hangout before your first meeting to work out any technological kinks.

Be sure your members have access to all of the documents they need so you can read and review together. We recommend sending links to the documents by email in advance.

If you're using a Google+ Hangout for your meeting, you can use the Google Drive plugin (click the blue, yellow, and green triangle on the left side) to view the documents as a group during the meeting.

Preparing for the First Conversation



It will help to speed the process initially if you (and the group's other co-leaders, if there are any) think through the [**Giving Circle Startup Questions**](#) before your first gathering.

- Draft your answers in a short document that you can share with the group before or at the first meeting.
- Frame your answers as proposals that are open to discussion by the group - unless you feel that they are requirements that you and any other founders will insist upon.
- Send invitations to the first meeting at least three weeks in advance. See our [**Sample Membership Recruitment Letter**](#) for a customizable template.

! TIP

Believe it or not, scheduling meetings can be one of the hardest things your giving circle will have to do! Trying using [**Doodle**](#) or [**MeetingWizard**](#) to make this task a little easier, and try to make sure that you have as many members as possible present - in person, by video, or on the phone - for these important initial conversations.

CONVERSATION 1

Introduction, Logistics



1 hr 15 min to
2 hr 30 min



Purpose

Gather your group, get to know each other, describe what a giving circle is, and talk about overall structure and logistics.



Resources

Use these documents together with this section.

[Giving Circles FAQ](#)

[Group Dynamics, Safe Spaces & Facilitation](#)

[Making Decisions: Some Approaches](#)

[Giving Circle Startup Questions](#)

What to Know

This first conversation can take on a casual or even festive feel. Depending on how well people know each other, there may be excitement and curiosity in the air, as the possibilities are wide open for what's to come. There might also be a bit of hesitancy, as some guests may feel unsure about what they're getting themselves into. Do your best to help everyone feel welcome and at ease.

In your initial conversations, it's also important to stress that while it's important for the group to learn how to make decisions together, the things you actually decide are not set in stone forever. One of the beautiful things about a giving circle is that the members typically determine its direction and focus - and thus can change that direction and focus if it's no longer working. At the same time, it's important to narrow your options down and choose *something* (even if you change it later), simply because there are so many potential paths your circle can take. Make sure everyone understands that you're entering the experimental "startup" phase; that what you decide is not set in stone; but that you do have to make some choices to move ahead effectively.



5 to 15 min

Arrival and Social Time



10 to 20 min

Introductions and Goals

- 1 Describe briefly what a giving circle is. You might add that this circle is in a nascent stage, and the purpose of this first meeting is to make some logistical decisions and start to imagine/get inspired by the possibilities.
- 2 Explain why you chose to start a giving circle and/or why the giving circle model resonates with you. Talk about how and why you chose this particular group of friends, peers or colleagues.
- 3 Ask everyone in the group to introduce themselves, why they said yes to this meeting and, if applicable, what prior experience they've had with philanthropy or volunteering. (Note: you can modify this question depending on the group. For example, if you've invited people who specifically work in education, ask them to say a few words on their connection to that cause.) Gently limit each person to two minutes. The gentle beep of a timer can be a neutral way to move on to the next person.



10 min

Overview of Giving Circles

- 1 Discuss the [Giving Circles FAQ](#). Talk in more detail about what a giving circle is (and what it isn't). Be sure to explain that a giving circle is more than a way to fund people's pet charities; it's a way to come together around a common goal for greater impact, both on the organizations you support and on the giving circle members themselves. Explain, too, that giving circles are about more than just cutting checks. They take time, energy and thought.
- 2 Open it up for dialogue and questions. Know that you may not (and need not) have all the answers at this point. If questions arise that you can't resolve, collect them and send them to [Hello@AmplifierGiving.org](mailto>Hello@AmplifierGiving.org) - we'll do our best to help you answer them!



10 to 20 min

Creating a Safe Space & Deciding on Decision-Making

- 1 Set up Ground Rules.** Have the group identify and agree to some Ground Rules (discussed in [Group Dynamics, Safe Spaces and Facilitation](#)) for your shared conversations – in whatever terms and with whatever level of formality (or lack thereof) 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.
- 2 Decide how meetings will be facilitated.** Will the same person run every meeting, or will you rotate the job of facilitator? Or will the group find either a paid or volunteer facilitator to help guide you through your upcoming conversations?
- 3 Decide on a decision-making approach.** Summarize or distribute and discuss [Making Decisions: Some Approaches](#), and have the group decide (at least for now) how decisions will be made. Is your group up for the challenge of finding group consensus, or does it make more sense to use majority-rules voting? Remember that you can always adapt your process as time goes on, according to what feels best for members.

30 min to
1 hr 10 min

Giving Circle Logistics Discussion

- 1 Explain that this conversation, your circle’s first, is about setting up the circle’s operations and approach.** Your next conversations will be about determining shared group values, your circle’s mission, and your grant focus areas.
- 2 Discuss the [Giving Circle Startup Questions](#) as a group.** Distribute your draft proposals/requirements (if you’ve written them up) and discuss each question. Decide ahead of time which items are open for debate and which are not. Preface this conversation by saying that the group doesn’t need to decide everything at this first meeting; the point is to get people talking, thinking and working together. Spend 7-15 minutes on each section, with the note-taker recording the group’s decision and/or further questions that need to be answered.

Again, remember: although it’s good to have as much clarity as possible about the giving circle’s direction, you can tweak and adapt things as you go along if you find that the decisions you made early on don’t continue to resonate with the group.



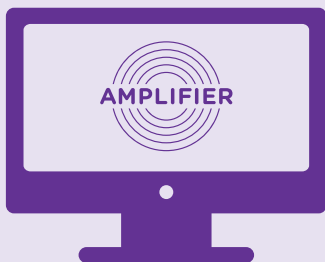
0 to 15 min*

**0 min if you are going right into the next Conversation in the same meeting.*

Next Steps and Close

In addition to any of the **Giving Circle Startup Questions** that need further reflection, ask participants to think about the following issues before you hold your next Conversation.

- What should we name our giving circle?
- The next Conversation is about the values that motivate members' own (and the circle's collective) giving. Ask participants to think about what they hope to accomplish with their giving as individuals and as part of this group. Is there anything they feel they *must* do, any red lines they won't/can't cross? The goal of the giving circle is to make decisions that everyone can live with, even if not everyone gets his/her first choice. Knowing ahead of time what members feel they absolutely must do or can't accept will be helpful.
- An important element of the values Conversation will be discussing "how Jewish" the group wants its giving to be. Ask participants to reflect on this before the next meeting. How will Jewish values inform and infuse the group's giving? Will you support both Jewish and non-Jewish organizations? Will you support Jewish organizations serving non-Jews (i.e. American Jewish World Service, Mazon, Innovation: Africa)?



Get Your Circle on the Map!

Now that you've had your first giving circle meeting and made a few decisions, we encourage you to create your **Giving Circle Profile** on the Amplifier platform. Sign up with your email or social network account and Amplifier will prompt you to create your circle profile by filling out a few basic questions.

After creating your profile, you'll be able to see your circle alongside all the other giving circles on the Amplifier platform in the **Circle Directory**. This network of giving circles have had or are having similar conversations about vision, mission and values, just like your circle.

Note: You can create your Giving Circle Profile at any point in the process. You can decide to create your profile after having your first few meetings, or you can always update your profile with more information as you move through additional conversations about vision, mission and values. As with anything related to the giving circle experience, you and other members should collectively decide what is right for you.

CONVERSATION 2

Values



1 hr 30 min to
2 hr 30 min



Purpose

Identify where members' values around giving overlap and decide on the shared values of the giving circle.

Additional Materials

You will need a list of values for members to discuss and choose from. We like 21/64's [Picture Your Legacy](#) and [Motivational Values](#) card decks and the [Picture Your Legacy iPhone app](#), which give people the physical experience of sorting through cards and making selections. Picture Your Legacy is a set of evocative images; Motivational Values puts the values into words. (Check out their website at www.2164.net for more information about the cards.) For Jewish values, we like Rose Community Foundation's Jewish Values cards, which highlight 18 core Jewish values underlying tzedakah with definitions and textual references. ([Email Rose Community Foundation](#) to request a copy of the Jewish Values Cards.) You can also find lists of values online on various philanthropy sites and books like Inspired Philanthropy.

For groups meeting virtually, Check out mural.ly, a free collaborative virtual whiteboard where you can create, edit, and move "post-its" of all shapes, sizes, and colors. Before the meeting, create a whiteboard and pre-populate it with the values you want the group to choose from.



Resources

Use these documents together with this section.

[Picture Your Legacy](#)

[Motivational Values](#)

[Picture Your Legacy iPhone app](#)

[Making Decisions: Some Approaches](#)

[Selected Texts on Jewish Giving](#)

What to Know

Talking about values might seem overly broad or abstract at first. Ground the conversation in people's real experiences, and ask them to share examples of how a specific value came to be part of their lives, or how they practice that value in their life. If possible, it may help to have a skilled facilitator outside the circle lead this discussion so that you, as the circle leader or founder, can participate fully. Professional facilitators will likely charge a fee for their time. Reach out to Hello@AmplifierGiving.org for ideas and recommendations about potential facilitators.



0 to 10 min*

**0 min if this conversation is part of the same meeting as the previous one*

Arrival and Social Time



0 to 10 min

Welcome and Follow Up from Last Conversation

1 Ask everyone to re-introduce themselves as needed and briefly say a few words about what they have been thinking about since the last meeting, or what is inspiring them about the giving circle. New members should introduce themselves and explain why they've decided to join the giving circle.

2 Follow up on any action items from the first meeting.



5 to 10 min

Discuss Conversation Goals and Definitions

1 Explain that the purpose of the next two conversations is to decide what matters the most to your group in the form of values, vision and mission. These conversations will help form your circle's identity and culture and define the purpose of your giving. Today's conversation is about Values.

2 If you need to, define Values, Vision and Mission and how they differ.

Sample definitions:

- 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")
- Vision describes what we aspire to for the future - what a better world could look like if we are successful (e.g. "a community where everyone has a quality Jewish education"; "an end to homelessness")
- Mission describes your purpose - what you do and how you do it (likely a "to" statement, e.g. "our mission is to promote educational excellence and affordability"; "our mission is to expand access to programs that combat the root causes of homelessness")

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3 Acknowledge that the group might be eager to talk about the group's vision and mission and actual funding areas, but that this conversation will focus on Values. (Remember: you can always decide to combine this conversation and the next one if you have time and if people are eager to get everything done at once.) The Values conversation, while more abstract than the others, is an invaluable and rewarding part of the process. It's an excellent way for people to start to understand their own motivations for giving and those of the rest of the group.



1 hr 10 min to
1 hr 45 min

Values Conversation

1 The purpose of this conversation is for members to articulate some personal values, and then to establish shared values that will underlie the group's giving. We all have values that guide us, but we seldom have an opportunity to articulate, prioritize, or share them with others. This conversation will help members of the group open up and get to know each other, and to find areas where values overlap.

Keep in mind that the objective of this conversation is not to find complete unanimity, where everyone expresses exactly the same preference. (In fact, diversity will make your group discussions more interesting!) 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. (See [Making Decisions: Some Approaches](#) for more on consensus and how to achieve it.)

40 min to
1 hour 5 min

PART ONE

Take out the set of values cards you have decided to use. For the purposes of this guide, we're going to talk through the exercise as if you're using actual physical cards. You can easily adapt these instructions for a written list of values by substituting "words" for "cards."

Spend 5-10 minutes having each person sort through the cards, choosing their top 5 ("most important to me in my giving") and bottom 5 ("least important to me in my giving"). Lay those cards face-up on the table so that everyone can see them; keep the rest (those of "medium" importance) to the side.

Spend 10-20 minutes having each person say something about one of the cards that provoked a strong response in them, and why. Make sure that people explain what the value means to them – the same word or image 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. 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.

Now glance around at everyone's cards and spend **5 minutes** aggregating the responses, tallying which cards were selected by the most people – both the “favorites” and the “least favorites.” (One way to do this is to write up the values people have selected on a flip chart or piece of paper and record how many people chose that value...or you might just eyeball this. It doesn't have to be a perfect science.) Many of the cards have similar meanings, so group together like-minded values, such as “compassion” and “kindness,” and agree on a word (or image) that reflects people's intentions.

Once the values are aggregated and prioritized, spend **5-15 minutes** having members formulate values statements for the group based on what seems to be important (or not) to the most group members. They should write their statements on the flipchart/whiteboard/paper so the whole group can see them. For example: “our group values innovation - many of us want to use our philanthropy to find new and creative ways of doing something.” Or: “most of the members of our group do not hold recognition as a value in their philanthropy - we want to give without having our names attached to our giving.”

Spend **5 minutes** ensuring that the value statements resonate with enough members to make viable. If some people are strongly opposed to particular statements, drop those statements – unless others feel strongly that they must be included. Again, remember that “the perfect is the enemy of the good.” You're aiming for general agreement about what's important to people, not a perfect explication of every value the group holds dear. And don't spend too much time wordsmithing. That can be done for homework, if necessary.

Collect as many consensus-approved value statements as the group feels it needs. (More than 10 gets to be unwieldy.) Decide if you want to whittle the list down to the top 5 – this is just a matter of preference.

Finally, spend **5 minutes** having people go back to the cards they did not select in their top or bottom 5 to see if they feel that anything has been tragically overlooked. Allow a few last-minute additions to the list if necessary.

Keep the list up on a flip chart/white board/piece of paper for the group to see throughout the rest of the meeting, and make sure the note-taker records the list or takes a picture for future reference.

Take a 5 minute break. Whew!



30 min to
40 min

PART TWO

Do the same exercise with a list of Jewish values, using either Rose Community Foundation's Jewish Values Cards or a pre-selected group of 10-15 texts from [Selected Texts on Jewish Giving](#).

Don't skip this step! Even if your group is new to Jewish values, and even if all of the group members aren't Jewish, both of the sources above contain a wide variety of charitable values that emerge from Jewish tradition but have near-universal relevance. Whether your group decides to support Jewish causes or not, or organizations that serve only Jews (or Israelis), rooting your giving in Jewish values is what makes your circle a Jewish Giving Circle.

You might also decide to do Part Two first, and to spend more time on it than Part One. We think Part One is easier to do first, since it's more general and universal; but you should do what feels best for your particular group.

If you're using the Jewish Values Cards, Rose Community Foundation offers the following advice:

Each card has two sides: a value side and a text side. Users should approach the cards from the value side first, referring to the text side for a source selected to add depth to the concept of the value. Some texts are an early explanation of a value, the place where the concept first appears in the Jewish lexicon. Other texts provide a contemporary lens through which to view an enduring concept.

The exercise is the same as Part One, except perhaps a little faster:

Spend **5-10 minutes** having each person sort through the cards, choosing their top 5 ("most important to me in my giving") and bottom 5 ("least important to me in my giving"). Lay those cards face-up on the table so that everyone can see them; keep the rest (those of "medium" importance) to the side.

Spend **5-10 minutes** having each person say something about one of the cards that provoked a strong response in them, and why. Make sure that people explain what the value means to them and make reference to specific stories from their lives to illustrate why they chose (or didn't choose) particular values.

Spend **5 minutes** aggregating the responses, grouping together like-minded values and identifying the group's "favorites" and "least favorites."

Spend **5-10 minutes** having members of the group articulate values statements for the group based on what seems to be important (or not important) to many group members and writing them on the flipchart/whiteboard/paper so the whole group can see them.



Spend **5 minutes** ensuring that the value statements resonate with enough group members to make them a viable path forward. Collect as many consensus-approved value statements as the group feels it needs.

Spend **5 minutes** having people go back to the cards they did not select in their top or bottom 5 to see if they feel that anything has been tragically overlooked. Allow a few last-minute additions to the list if necessary.

Keep the list up on a flip chart/white board/piece of paper for the group to see throughout the rest of the meeting, and make sure the note-taker records the list or takes a picture for future reference.



15 min

Next Steps and Close

1 Make sure the notetaker or another volunteer writes down or takes a picture of the final list of group values.

2 End with any needed action steps and some reflection.

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

→ When and where will we hold our next conversation? (Answers might range from “right now” to “next week” to “next month.” Try not to go too long between conversations, so that you people’s memory stays fresh and the group keeps its momentum up.)

*There are a lot of helpful meeting scheduling tools out. A couple we like are **Meeting Wizard** and **Doodle**.*

→ What worked well in this conversation? What didn’t work so well?

3 Spend some time socializing...and eating!

4 Within a few days of the conversation, the note-taker should send around a summary, including the values that the group decided upon to guide its giving. Any outstanding questions can be resolved over email or at the beginning of the next conversation.

CONVERSATION 3

Vision, Mission, & Funding Areas



2 hr to
3 hr



PURPOSE

Decide on the giving circle's grant focus area(s), and articulate a mission and vision for the circle's giving.



RESOURCES

Use these documents together with this section.

[Grant Focus Areas](#)

[Mission, Vision & Values Worksheet](#)

[Map Your Assets: The 3Ts / 3Ws](#)

WHAT TO KNOW

In this conversation, you'll be taking the values the group articulated in the last conversation and using them to decide on: the issues your group cares about; the mission, or what you hope your giving will accomplish; and the various assets your group brings to these issues. It can be helpful to have a skilled outside facilitator guide this conversation - partly because there's so much ground to cover, but also so that *everyone* (including the circle leader(s)) can participate fully in the conversation. As always, remember that there are many excellent outcomes for this conversation: there's no "right" answer, and nothing is written in stone. Priorities, values, focus areas can always change over time. It's just important to choose something now so the group can move forward and start its giving. The circle leader and members might also want to prepare for this conversation by learning about the issues facing the community or region in which you'll be offering funding. This knowledge can be gleaned from local nonprofit and philanthropy professionals, newspaper and magazine articles, and reports published by think tanks, foundations (especially community foundations) and nonprofits. Finally, if you're short on time, you can focus primarily on settling on the grant focus area(s), and then assign the task of articulating a mission and vision to a member as homework. The mission and vision will emerge out of your grant focus area(s), and if you must prioritize the work you do together, the focus area conversation is a more critical group activity.

For groups meeting virtually, on [mural.ly](#) (or whatever technology you are using), you'll need to make all three documents available in advance (See Resources to the left). We recommend sending links to the documents by email in advance. If you're using a Google+ Hangout for your meeting, you can use the Google Drive plugin (click the blue, yellow, and green triangle on the left side) to view the documents as a group during the meeting.



0 to 10 min*

**0 min if this conversation is part of the same meeting as the previous one*

Arrival and Social Time



0 to 5 min

Welcome and Follow Up from Last Conversation

1 New members should introduce themselves and explain why they've decided to join the giving circle; other members should briefly share any pressing thoughts about the circle that have arisen since the last meeting.

2 Follow up on any action items from the first meeting.



2 hr 10 min

Vision and Mission Conversation

1 Revisit the shared group values you chose at the last meeting. Now that you've identified values for your giving circle, the next step is to put those values into practice by articulating mission and vision statements that will guide your group's decision-making. (It will help to have those values on the wall or in front of everyone throughout the meeting as a point of reference.)

Explain that in this conversation, the group will be putting together four major pieces of the puzzle: (1) your group's shared values; (2) the funding areas your group most wants to support; (3) your initial assessment of pressing needs in the community you hope to affect with your giving; and (4) the assets your group can bring to bear on these issues. These will result in the mission and vision statements that will guide your giving agenda.

10 min

2 Define mission and vision. By the end of this conversation, you will have articulated a mission and a vision, which are critical for the circle's self-understanding and your ability to explain to others – like grant applicants and potential new members – what you're trying to accomplish.



- *Vision describes what we aspire to for the future - what a better world will look like if we are successful (e.g. "a community where everyone has a quality Jewish education"; "an end to homelessness")*
- *Mission describes our purpose - what we do and how we do it (likely a "to" statement, e.g. "our mission is to promote educational excellence and affordability"; "our mission is to expand access to programs that combat the root causes of homelessness")*

20 min

3 **Uncover individual members' funding area interests and then aggregate shared interests.** Using the **Grant Focus Areas** document, have everyone indicate the 3 funding areas from either the Slingshot/Natan or the NTEE lists that are most important to them personally, and the 3 that are the least important. Then compare and discuss the areas that have the most overlap between members.

You can do this in many ways, including:

- Give everyone the same list and have them circle their top 3 and put an "x" next to their bottom three. Tally up the ones that were selected the most often (both for "top" and "bottom") and ask a few members to explain why they chose those areas. It's helpful to discuss both the most and least interesting areas, as much as time allows.

OR

- If you are using a list written on a flip chart or white board, you can ask participants to put small stickers or post-it notes next to the areas that are the most and least important. This will enable a quick visual assessment of which areas have the most overlapping interests between members. Ask a few members to explain why they chose those areas.

Figure out where there is the most alignment in the group, both around issue areas the group *wants* to support and things they *do not* want to support. List these top and bottom items for everyone to see on a flip chart or piece of paper.

15 min

4 **Other Factors.** Now that you know the basic "what" of your funding, you can narrow the focus even further to make your decision-making easier, reduce the number of irrelevant grant applications, and have more impact in a particular subfield. The more you can prioritize what you will and won't fund, the easier it will be to review and select organizations later on - and the more you will limit the possibility that irrelevant applicants will apply for your grants, which isn't a great use of your time or theirs.

More on Next Page →



Grant Focus Areas includes suggestions of ways to focus giving beyond issue areas. Questions will help you consider narrowing your support by:

- Population served
- Geographic region
- Organizational life cycle

Using **Grant Focus Areas**, discuss these issues with the group, weighing the pros and cons of narrowing according to these different dimensions.

20 min

5 Discuss community needs and opportunities. It's important to balance what your group wants to support with what the community actually needs.

DISCUSS AS A GROUP

What does our target population actually need and want? How can we do the most good with our particular resources? Where are there gaps in services and resources, and what assets already exist that we can help to strengthen?

Ask members to summarize any research they have done on this issue, and/or prior personal or professional knowledge they have. If you have extra time, you could ask a community expert to join you in this conversation (or a separate conversation devoted to this question). You could also assign members to research particular community needs that are interesting to the group and report back in writing between meetings or in person at the next meeting. You don't necessarily need a full answer to this question now - instead, you could use this time to generate a list of questions and task people with finding the answers.

15 min

6 Map your assets. One of the exciting advantages of being in a giving circle is the opportunity to engage with your grant recipients in a meaningful way, beyond mailing them a check. *What assets - including but not limited to the financial - does your group have that can benefit the organizations and causes you care about?* Use **Map Your Assets: The 3Ts / 3Ws** to help members think through the various ways they might add value. Take note also of the words of caution; it's crucial to verify that organizations actually want and need what you have to offer.



20 min

7 Bring it all together.

- Discuss the relationship between your shared values, your top interest areas, community needs, and your assets. Ask people to articulate that relationship out loud for 3-5 of the areas you've identified.

EXAMPLE

"Our top values are courage, tolerance, and community; our top Jewish values are *'do not stand idly by'* and *'everyone is created in the image of G-d'*; our top issue areas are Interfaith, LGBTQ and Spirituality/Religion; and we have writers, teachers, and fundraisers among our members. We believe that Judaism has a great deal to teach Jews and others about the importance of welcoming the stranger and treating everyone as if they were created in the image of G-d, and we believe the religious leaders and communities are the place where this kind of tolerance and inclusion needs to begin. We can not only fund programs that operate in this area but also help organizations to spread the word about their work and tap our own networks to raise additional money for them."

- Use consensus or vote to decide which issue area the group will pursue - where the group feels it can add the most value. It will be difficult to decide on just one area, but keep in mind: the more focused your giving, the more impact you can have, and the more efficiently you will spend your members' and your grant applicants' time. There's no "right" or "wrong" answer; you just need to make a choice so your circle can keep moving forward. And nothing is forever! You can always tweak and shift your focus as time goes on, once you see how this first grantmaking round goes.

20 min

- ## 8 Craft mission, vision, and values statements.
- It's often difficult to write and wordsmith a document in a large group. Unless you feel up to the challenge, ask a small team of 2-4 volunteers to craft these statements at home and share them with the rest of the membership for discussion either virtually or when you next get together.



To inform the writing, discuss the following questions as a group. (Check out [Mission, Vision and Values: Worksheet and Samples](#) for more ideas.)

- **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?

TEMPLATES

Basic templates for the vision, mission and values statements:

VISION: "Our vision is for a world/community that is (or people who are) _____."

MISSION: "Our mission is to _____ by supporting organizations/individuals that do _____."

VALUES: "Our grantmaking and our community are guided by the values of _____, _____, and _____."



0-15 min

Next Steps and Close

1 End with any needed action steps and some reflection:

- What needs to be done next, if anything? By what date? Who will do it?
- When and where will we hold our next conversation?
- What worked well in this conversation?
- What might we consider for our next meeting?

2 At the end of the meeting, allow a bit more time for socializing and wrapping up.

Congratulations!

You've now completed the initial Conversations that will ground your circle's grantmaking and other activities. Curious about everything that comes next? We recommend downloading ***Giving Circle Essentials*** and reading through Section 7 on the Grantmaking Process - especially the 9 Steps of Grantmaking. Please also browse through the Grantmaking section of the Resource Library at www.AmplifierGiving.org for even more information.

Amplifier's web platform offers various online giving circle management and grantmaking tools - make sure to register your circle to be able to access everything.

As always, we are here to help! Reach out with questions anytime to [**Hello@AmplifierGiving.org**](mailto:Hello@AmplifierGiving.org).
