



# GIVING CIRCLES

## WHAT IS A GIVING CIRCLE?

- Giving circles are groups of people who pool their money and give it to a charity they choose together. In the process, donors connect with one another and with their communities.
- A giving circle can be small and informal, something like a neighborly potluck, with a few members. Alternatively, it can be highly organized, require contributions of thousands of dollars and a commitment of many years. The design of each giving circle is entirely up to its members. Each group decides on amounts, how often they meet, focus of their grants, etc.
- By pooling their contributions, individuals can achieve a greater impact. Also, researching organizations and figuring out where donations can make the biggest impact is easier when shared with others.
- Models of the democratic process, giving circles give members equal voice in deciding where their charitable contributions go.
- According to estimates by The Collective Giving Research Group, giving circles in the U.S. have, in total, given \$1.29 billion from 150,000 donors over recent years.

## GIVING CIRCLES IN JEFFERSON COUNTY

- There have been seven giving circles in Jefferson County since 2011.
- Most of them started with 10 people each making a commitment of \$1,000 per year for three years, plus an additional \$150 per person each year for the Foundation's giving circle activities.

## JEFFERSON COMMUNITY FOUNDATION PROVIDES SUPPORT BY:

- Providing orientation materials and information about giving circles generally
- Sharing information on specific nonprofits and community issues
- Helping identify needs within interest areas
- Providing grant management tools, grantee reporting forms, etc.
- Distributing Requests for Proposal and receiving and organizing proposals
- Providing support in vetting nonprofit organizations (budgets, other funders, etc.)
- Sharing process models from previous giving circles
- Assisting money management and grant administration

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## FEEDBACK FROM JEFFERSON COUNTY GIVING CIRCLE MEMBERS

### What Members Got Out of Their Giving Circles

- Getting to know each other
- Getting to know community needs
- Getting to know local nonprofits
- A better understanding of philanthropy
- A contribution to their own legacy
- Great new relationships
- Respect for local nonprofits
- A feeling of real investment in community
- Seeing real impact result from grants (new programs, etc.)
- Volunteer opportunities (if so inclined)
- A sense of the diverse issues the community cares about

### Lessons Learned About Gathering People for Your Circle

- It can be helpful to hold an initial information session for people who are interested.
- Consider geographic diversity.
- Do you want full-time residents only or also weekenders? Circles might encourage bonding of part-timers.
- It is a wonderful way to bring in people who are new to the community.
- Consider how you will include couples — one donation or two? One vote per person or a shared vote?
- Giving Circles remain flexible to changing needs of the group. If someone drops out, (s)he can be replaced by the remaining members or not, depending on what the group decides.

### Lessons Learned About Start-up

- It will take some time to settle the dynamics of the group.
- Work together to determine the goal of the group. What issue will you focus on?
- Consider sharing leadership within group.
- Where will you meet? Having meetings in people's homes offers a personal connection while meetings at local nonprofits or community spaces (libraries, rec centers, etc.) offer more of a connection to community activities.

### Lessons Learned Through the Grant Process

- Does your group want to grant for operations, programs, capital projects or a combination?
- How does the group feel about immediate impact vs. long term impact of the grants the group will make?
- The group should assess the commitment of the nonprofit's leadership to the project under consideration.
- What criteria are important to you when evaluating proposals?
- What community data is available for you to review when thinking about where the most impact can be made?
- What reporting would your giving circle want from the grantee?
- Tools that JC giving circles have used in grant process include requesting a Letter of Interest; sending out a Request for Proposals; doing site visits



Jefferson Community Foundation connects diverse people, ideas and resources to build a future of opportunity for all in Jefferson County.

#### WE SERVE AS HUB FOR OUR COMMUNITY TO:

- GIVE** donations informed with local knowledge & strategy,
- BUILD** strong and collaborative nonprofits, and
- SOLVE** regional issues by working together on solutions.

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