



foundation for
sustainable development

giving circle toolkit



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welcome

On behalf of the Foundation for Sustainable Development (FSD) we would like to welcome you to our family of hosted Global Giving Circles.

We are confident that you will find this experience to be incredibly satisfying. You will become a part of a movement of grantmaking called 'engaged philanthropy.' In engaged philanthropy you are not just making a donation, but getting to know the organizations intimately, becoming educated in the grant proposal review process, and participating in lively discussion with experts and circle members on key international development issues.

To be sure, the Giving Circle requires more effort than just making a donation. To make the process a little easier, we have written this Global Giving Circle Toolkit for the leaders of all our hosted circles. This manual is the compilation of years of experience in supporting globally focused Giving Circles. This toolkit includes just about everything you need to know to get your circle up and running, and to keep it functioning smoothly, including:

- **Planning questions** designed to help you determine the format and structure of your Giving Circle
- Ideas on how to **recruit members** into your circle and **raise funds**
- Examples of past **Giving Circle structures** along with sample curricula
- Advice on **logistical issues** such as scheduling and finding a meeting location
- Instruction on the use of **online tools** that enable Giving Circles to connect in between in-person meetings
- **Group exercises** that have been used in past Giving Circles to guide the group's decision-making process, including templates that can be easily distributed and completed by your members
- Sample **e-mail communications** from group leaders to members throughout the Giving Circle process
- Key resources **on best practices in international grantmaking**, with a special emphasis on cross-cultural issues in the grantmaking process
- Advice for facilitating the circle and dealing with **interpersonal challenges** in the group process
- **How to get advice and support** from FSD staff as well as peers who have experience in leading globally focused Giving Circles

This information is designed to help guide you in your own circle experience. It is important to keep in mind, however, that you know your community/circle best. What works for one group might not necessarily work for another. Feel free to deviate from our guide in order to give your circle participants the best experience possible.

planning your global giving circle

The first and most important step in the planning process is to examine your own goals and expectations for the Giving Circle. What do you hope to achieve by starting this circle? What are your expectations? How much time do you have to devote to the project? Your answers to these questions will help set the parameters for the circle and answer some of the more concrete planning questions to follow.

Once you have laid out your key goals and objectives, you can then begin the process of outlining how your Giving Circle is going to work. As the facilitator of the Giving Circle, you will have a number of initial decisions to make:

1. How many people would you ideally like to engage?

We have found that groups of 10-15 often work best for circle dynamics. That said, we have had circles as large as 20 participants. Larger group sizes are quite possible but you will need to do more facilitation that involves small discussion and group work.

2. Would you like a co-facilitator?

Being a facilitator is an exciting role that will fully engage you in the process of the circle. Having a co-facilitator can add a dimension to the experience and help you share the logistical and organizational aspects of the job.

When picking a co-facilitator try to find someone who has a different network of friends than you do. This will help you broaden your outreach for recruitment. It is also important to find someone who is comfortable in front of a group and can help you facilitate meetings.

3. How long will the circle last?

Your Giving Circle can exist for either a defined time period or on an ongoing basis. The structure depends upon what is most realistic for you and your members. Regardless of the format you choose, all Giving Circles revolve around a fixed grantmaking cycle that begins with the pooling of donations from all members and then concludes with a final decision as to how the group's funds will be granted. Each funding cycle may begin with a new topical theme and set of grantees, or in some cases you may continue engaging with the same topic and/or grant recipients.

Typically, Giving Circle grantmaking cycles last between four to seven months and meet on a monthly or bi-monthly basis. However, there are a number of different models you could use. Remember: You know your community and your circle best.

4. What will the focus of the circle be?

Each Giving Circle has a subject around which the proposals are focused. Whether the subject is a specific country, or an issue area that spans multiple countries, deciding what to focus your circle on is an important aspect of your planning. FSD works with over 200 partner organizations in 6 countries (India, Uganda, Kenya, Nicaragua, Bolivia, and Argentina). These partners work on a range of issue areas including microfinance, environment, health, education, women's empowerment, community development and human rights.

In picking a focus you can go about the process in two different ways:

1. Pick the topic as the leader of the group, and recruit around that topic
2. Recruit your circle participants around the general idea of starting a Giving Circle and then choose together the topic that you would like to address.

5. How much will the financial commitment be to join the circle?

FSD funds Giving Circle grants at a minimum of \$2500 per grant. Most grants are between \$2,500-\$10,000. When trying to decide the minimum commitment level for your members, think carefully about the community you are engaging. We have found that it is best to ask people for a commitment that is more than they might usually give. This helps to ensure that participants have “buy-in” to the circle process and will be fully engaged. We recommend planning on funding at least two grants, which would mean developing a circle that would raise a minimum of \$5,000.

There is a variety of ways to structure financial commitments. Some circles find it simplest to choose one contribution level that applies to everyone. Other circles adopt a tiered membership structure that allows participants to become involved based upon their desired level of engagement. In a tiered structure, participants have the option of either becoming:

- **Members** who are able to participate in the group decision-making process by meeting a minimum financial commitment;
- **Contributors** who may donate any amount to the circle’s grantmaking pool, but are not eligible to participate in the grant decision-making process; and
- **Sponsors** who donate the funds for others to participate on their behalf (see membership recruitment and fundraising). This option is ideal for those who want to feel connected to the work of the circle, but lack the time to become actively involved.

FSD staff will guide you in setting a financial commitment level and membership structure that best suits your prospective Giving Circle participants.

Setting a Commitment Range

Several of our Giving Circles have found it helpful to establish a commitment range to accommodate those with different capacities to give. For example, if your minimum membership commitment is \$500, you may wish to establish a commitment range of \$500 - \$2,000. We have learned that when the membership level is fixed, most members will give at that minimum level, even if they have the ability to contribute more. The goal of establishing a range is to set a realistic minimum while encouraging donors to slightly stretch themselves, if possible. However, one should be careful about making the high end of the range too large, so as to prevent the impression that membership is too costly.

The Importance of Donor Confidentiality

Regardless of the membership structure you choose, circle participants are likely to give at varying levels. Some may give above the minimum membership level. Other members may be sponsored or partially sponsored. Because your Giving Circle members may be giving at different amounts, it is important to keep all information about individual financial commitments confidential. Since FSD will collect the donations and send out tax deduction letters, there is no reason for anyone outside of the leadership to know the amount of individual donations, only the total amount available in the grantmaking pool. This approach is rooted in the belief that each voting member of the circle should have an equal voice in the decision-making process regardless of the amount contributed. To do otherwise would create a dysfunctional group dynamic where certain members feel that their opinions should be given more weight because they have contributed more money. A Giving Circle will not function smoothly unless all members feel an equal stake in the process.

Program & Administrative Costs

When setting the financial commitment, it is important to consider the program and administrative costs of engaging with FSD and how best to cover them. Most Giving Circles share these costs by asking members to contribute a program fee as separate from their grantmaking commitment. In some cases, circle leaders cover these fees for the entire circle so that member contributions can be solely dedicated to the grantmaking pool. Or you can do some combination of the above. FSD staff will help you with this calculation.

member recruitment & fundraising

recruitment

What is FSD and how does it help our circle? What is sustainable development? Furthermore, what's a Giving Circle? These are questions you'll have to answer during the recruitment process. To make it easier for you, we've provided a cheat sheet, including an introductory email and a one page document called Hosted Giving Circles.

While there are no hard and fast rules for recruiting members to a Giving Circle, below are some approaches that FSD has found useful during the circle recruitment process:

- 1. Talk with Friends:** An important first step in the formation of a global Giving Circle is talking informally with your friends, family and/or colleagues about the idea to gauge their potential interest. It is easy to assume that everyone you ask will be interested, but it is helpful to talk through the idea to make sure there is momentum before investing too much of your time in the planning.
- 2. Find a Co-Leader:** Approach one or two people who are most likely to be enthusiastic about the idea and invite them to form a planning group for the circle. You will increase your chances of getting the circle off the ground when you join with others who can share in the responsibilities and help recruit from their networks.
- 3. Practice Your Elevator Pitch:** Practice how you are going to introduce the idea to others. Your "pitch" should state in 30 seconds or less:
 - Your interest in Giving Circles and what they are
 - The issue your circle will address and why you want to make a difference
 - The ways one can get involved and a timeline

Be sure to mention the different levels of involvement, especially with those who are busy. If your contacts decline for time reasons, let them know that the circle still welcomes support in any amount to the grant-making pool and that there is the opportunity to sponsor someone to participate on their behalf.

4. Tap Your Networks: One common pitfall of recruitment is deciding for others whether or not they'd want to join. It's often surprising who is actually interested in joining a circle. Don't just talk to family and friends—widen your circle to include work colleagues, members of your religious group, neighbors, etc.

5. Host a Party: Many Giving Circles launch by hosting a gathering at the home of the circle host. This event may include food or cocktails, feature an inspiring speaker followed by a brief presentation about your planned circle and an invitation to join.

Tips on Hosting a Party:

- Be clear in your invitation that you are recruiting for a Giving Circle and that the party is informational.
- Provide food and drinks; people like to eat and it makes them feel welcomed and relaxed.
- Be ready with a short description of the circle and how it works. Feel free to pass out FSD brochures, show our video, etc.
- Consider having an inspiring speaker, someone who can talk about international development or the issue at hand. Inspiration is key for this event so make sure your speaker can deliver that!

6. Offer Sponsorship Opportunities: Some people may not be interested or have the time to fully participate, but would be willing to sponsor someone to join the circle on his/her behalf. FSD Giving Circles can accept full and partial sponsorships. Not only are you able to engage with a possible future participant, but by offering a sponsorship you are able to include an interested person who otherwise couldn't afford to join. Sponsorships are also an excellent way to diversify your circle. Think about voices that are not yet included with the group of participants that you have. A young person? A native of the area you're focusing on? Someone from the world of philanthropy?

7. Seek Help From FSD: Do not hesitate to take advantage of all the great tools and support FSD has to offer. We can help promote the work of your Giving Circle through our extensive alumni network, communications outreach channels, and media coverage. We can also offer your circle significant exposure through our interactive website. All of our hosted circles can establish their own dedicated page where visitors may follow group communications, learn about the projects you are considering, and even make direct donations to your grantmaking pool. Please let us know if you are interested in having us publicize or refer potential members and contributors to your Giving Circle.

Remember:

There is no magic formula to recruiting members for your circle. Most circles get off the ground first by the host tapping into her/his own social networks. Be sure to use your contacts.

confront your fears about fundraising

Many of us are understandably uncomfortable with asking friends, family, and colleagues for money, no matter how good the cause. Our best advice, which is easier said than done, is to try not to take it too personally!

The reality is that only a portion of the people you ask are likely to be interested in your Giving Circle. There could be a multitude of reasons: People are busy with their work, family and other obligations, or they may lack the financial resources and could be reluctant to say so. Finally, and most importantly, many people do not have the interest or the right temperament to engage in a group process. Giving Circles are certainly not for everyone.

You may be comforted to know that asking someone to join a Giving Circle can actually be easier than fundraising for a cause or charity, especially if the commitment is well defined in advance. You are simply conveying your enthusiasm and providing information on ways to get involved. It is then up to the prospective member whether or not they would like to join. Your own involvement also conveys an important message that you are personally committed to the circle, passionate about making a difference in the world, and interested in having others join you in something that is going to be a unique experience. If you go into the process with that spirit, others are likely to catch it!

make the case for global giving

If you are starting a global Giving Circle through FSD, you obviously share our belief in the importance of giving internationally. However, you are likely to encounter the all-too-common question of “Why should I give overseas when there are so many problems here at home?” This is the essence of the engaged philanthropy approach, which combines the act of donation with the education of donors in international philanthropy.

There is a multitude of ways to answer this question; here are just a few possible responses:

- *If you have traveled abroad, share your personal experiences of how the extreme poverty and suffering you witnessed compares to the U.S.*
- *One dollar can go extremely far to help those in the most impoverished areas of the world. A significant number of lives can be saved and improved for comparatively small amounts of money.*
- *The planet is increasingly interconnected. What happens in another part of the world can have a profound impact on our lives at home. Terrorism, immigration, and the environment are all relevant examples of this.*
- *No matter where we live, we are all equally human. Giving at home and overseas is both important and desperately needed.*

Choose a response that resonates with you, but be prepared to answer the question. And of course, discussion with FSD staff is welcome and encouraged.



structuring your circle

Depending on where you are in the circle process, the format of your meeting will change. Generally speaking, the learning components of the process are concentrated in the first half of the grant cycle, whereas the final meetings are usually devoted exclusively to the grantmaking process. In the appendix of the toolkit you will find examples of different circle syllabi and the topics that were covered during their meetings. Please feel free to use these as templates to format your circle.

When?

The time of your meeting depends entirely on the context of your circle and the availability of your members. In our experience, Giving Circles with a diverse membership tend to work best with weekday evening meetings. For circles meeting in the workplace, lunchtime may be ideal.

It is also important to consider the time of year. Most circles meet sometime between September and June, as the summer can be a particularly difficult time to gather people together. Late November and December are also often challenging due to the busy holiday season.

We suggest a series of 4 to 6 meetings spanning the course of 3 to 5 months. If you are interested in a circle that lasts longer than 5 months, we suggest including two separate giving cycles. The reason for this is the turn around time for the organizations who are submitting proposals. FSD strives to keep a reasonably short amount of time between proposal submission and funding decisions for our partner organizations, who have urgent and changing needs with their work. If you choose to do two funding cycles, you would be provided with a second set of grant proposals following your first funding decisions.

Where?

Past circles have historically rotated the location of the meeting each month to a different participant's house. This takes the burden off of the leaders to always host and gives the circle a homey and comfortable feeling. Other options would be to find donated office space or community space that may be available. Work with your circle participants to try to find locations that are relatively easy for everyone to reach.

What?

Traditionally, FSD Giving Circles have used a two-hour meeting format. This is enough time for people to re-connect, relax and get engaged in the work. It's also about the length of time that people can stay focused and energized, especially in the evening! The first hour of a meeting often focuses on a speaker or an activity, with the second hour open to discussion and debate of the topics and proposals.

One of the most important pieces of advice we can give about your Giving Circle is to make it fun. No matter how important the work you doing, members will not show up if the experience isn't enjoyable. Some Giving Circles have focused the first 15-20 minutes around a potluck dinner. The dinner starts the meeting, gives people a chance to chat and makes them feel more at home. A plate of cookies to pass around later in the meeting doesn't hurt either! **The social dimension of the Giving Circle experience cannot be underestimated.**

Remember:

**these are just suggestions;
it might work best for your
circle to meet at someone's
office or at the local library.
You know your group best.**

How?

So that all sounds great, but how are you going to do it? Below are guidelines to help you along the way, and remember, FSD is there to support you when you get stuck.

guidelines on hosting your giving circle

Scheduling Meetings

Forget for a moment about the challenges of giving money away overseas. Perhaps the most challenging part of running a Giving Circle is scheduling the meetings. Your members will have extremely busy schedules and will likely be traveling at different times of the year. It is nearly impossible to get all of your members in the same room at the same time. The first thing to remember is not to take this too personally. Members will come in and out of meetings, and that's just a normal part of life.

A Few Helpful Tips:

- Ask members in all of your meeting announcements to bring their calendars to the next meeting. The best time to schedule is when you have everyone together in the same room. It's also helpful to insert this as an agenda item before the end of the meeting, as some people may leave early.
- If you find yourself needing to schedule a meeting electronically, make sure to propose as many options as possible within the given timeframe. This may seem like common sense, but 3-4 options is often not enough when you are trying to bring 10-15 people to the same place at the same time. Suggest a minimum of 7 possible meeting times.
- Managing responses can get confusing. Many people like to use online tools like Meeting Wizard at <http://www.meetingwizard.com>. The limitation of this service is that if all the participants do not respond, it does not notify you, so you must remember to check your account.
- You'll often have to pick a date that not everyone can make. This is ok. It's better to have one or two people miss a meeting than not have a meeting for that month.

Finding Guest Speakers

Past FSD Giving Circle members frequently cite the learning component, and especially guest presentations, as one of the most valuable aspects of their Giving Circle experience. An important part of your role as host is in planning the learning curriculum and inviting speakers that will help inform members about the topic they are addressing as well as best practices in international grantmaking.

If you are looking for speakers on your own, here are some suggestions to find them:

- **Local universities and colleges:** For topical experts, universities and colleges are a wonderful place to start. Professors are generally easy to access via the school's website and are often willing to speak. If they cannot speak themselves, they are often helpful in connecting you with people who could speak to your topic - graduate students, visiting staff, etc.
- **Local non-profits:** Searching the web for non-profit organizations in your community is another great way to find speakers. You can often find speakers to address country issues, your specific topic as well as the larger topic of philanthropy, and giving. Look for organizations that have an international focus and that are non-denominational.
- **International Communities:** Depending on where you live and the topic of your circle, you might have organized communities of immigrants in your area. Is your focus on Central America? See if you can find a group that works with the Latin American population in your town. Contacting them will lead you to speakers who can inform your circle members about life in the countries you are focused on.
- **Peace Corps:** The Peace Corps has an amazing network of Returned Peace Corps Volunteers (RPCVs) across the country. This is another good way to learn about life in the countries addressed by your circle. To find a RPCV to speak at one of your meetings contact your local Peace Corps recruitment office for assistance.

Online Communication Tools

Here are some tools for communicating online with your circle members:

- **Virtual Living Room** – FSD's www.giving-circles.org: This is the Foundation for Sustainable Development's offshoot website that provides a platform where you can communicate online with fellow Giving Circle members. You may choose to keep these communications private or public. However, the latter is strongly encouraged, as it enables visitors to the FSD website to follow your discussions and hopefully be inspired to join or contribute to your circle online.
- **E- Newsletters:** Some Giving Circles like to create e-newsletters as a way of communicating with their members. Services like Constant Contact <http://www.constantcontact.com> can be a very cost effective way of communicating with your existing and prospective members. However, an informal e-mail to your members also works perfectly well if your distribution list is small.
- **Google Groups:** Another option is creating a Google or Yahoo group or other "listserv" where you can keep a list of the membership online. Any member can send a message to a single e-mail address and that message will automatically be distributed to the entire Giving Circle membership. These groups are also archived so members can go back and search and/or review earlier threads.
- **Techsoup** <<http://www.techsoup.org>> is an excellent place for advice and resources regarding the use of technology to get out your message. FSD staff are also available to provide advice on these communication options, so do not hesitate to contact us.

Sample E-mail Communications

Understanding that all of your circle participants are busy people, it's important to remember not to flood their inbox with emails. Be sure that your emails are clear and concise and have all the information for the follow meeting. See the appendix for a sample email communication.

facilitating the grantmaking process

receiving proposals

The Foundation for Sustainable Development will provide a portfolio of prospective grantees for your Giving Circle to consider. The number of projects presented will depend upon on the amount of funds you have pooled together, your thematic focus, and the timeline of your group process. At the end of the grantmaking cycle, your circle will apply all that you have learned to award your pooled funds amongst the grant proposal choices presented.

FSD receives proposals through RFPs (request for proposals) released to our partner organizations. All partner organizations have a history of working with FSD and have been thoroughly vetted for ethical standards and alignment of mission by FSD staff working internationally.

evaluating proposals

Beginning Discussions of the Proposals/Organizations

The first discussion with your circle right before (or directly after) you have received the prospective grantees' proposals is possibly the most important discussion you will have with your circle members and is critical to the engaged philanthropy process, especially if they are new to the grantmaking process. This discussion will set the tone for how members read and evaluate the projects. This discussion is critical in that it should help set the expectations of the circle members and help educate them in the grant review process, thereby giving the proposal submitters the best possible and most equitable chance of being awarded a grant. If you do not feel comfortable starting this conversation, this is an excellent topic for a guest speaker to cover. In this case you would want to find someone who is an expert in international grantmaking.

Things to focus on during this conversation:

- **First Time Writers:** FSD is committed to supporting smaller grassroots organizations in very impoverished areas with both their project work and their organizational development and skills. One of the challenges of working with small grassroots organizations is that they often lack the formal structures and systems that we are accustomed to in the United States. Many of these organizations have never written a grant proposal before, and it is important to read the proposals with this in mind.
- **Quality of the Proposal:** Many of our past guest speakers have emphasized that great organizations can write a poor proposal. By the same token, groups that have a very slick or well presented proposal may not have the strongest programs on the ground. English is usually the writer's second or third language, if they even speak English at all. Grammar mistakes will abound and the meaning of what is being said can often be a mystery from the American frame of reference. And although it is difficult to generalize about the writing styles in different countries, proposals are often more verbose and less "too the point" than many Americans would like. Though admittedly a generalization, American donors often look for facts and figures where writing in many cultures is more contextual. One needs to look beyond one's preconceived ideas about presentation to get to the heart of the organization's work and what it is trying to accomplish.

- **“Philanthrospeak”:** Another phenomenon likely encountered in proposals is the use of jargon, “philanthrospeak,” or a way of expressing oneself where the prospective grantee is attempting to explain things in a way that they believe the funder would like to hear. Nonprofits in the United States are also guilty of this practice, which is perpetuated by concepts and formats invented and designed by donors to get the information they are seeking without much sensitivity to the fact that such notions are foreign to grantees in other cultures. Because such formats and concepts are so deeply engrained in the minds of some grantees (or those whose assistance they may seek to write such proposals for them) this may lead to a disconnect between questions we ask and the responses we receive.
- **Power Dynamics:** No matter how much one tries to consciously address this concern, there will always be a significant imbalance of power between grantors and grantees. We as donors have the money and are asking the questions. We feel that grantees must answer those questions in a way that is consistent with our giving objectives, which are community-based and focused on the organization’s priorities, not our own priorities and values. We encourage all of our Giving Circles to consider issues of power (this is a highly recommended theme for one meeting) and to do their best not to accentuate these issues when they are reviewing and making decisions on proposals. The way that we ask questions is an important aspect of this process, as discussed above. We ask that all of FSD hosted Giving Circle members strive for humility, trust and deep respect for the extraordinary work grantees are doing on the ground in difficult circumstances. Keep in mind that it is the work of the grantees that makes our work as donors possible, and that the ultimate purpose in all our interactions should be to support their priorities and successes.

communicating with prospective grantees

After your circle has had time to read through the proposals, it is natural that questions will arise. During discussion, ask circle members to make a clear list of questions for each prospective grantee. These questions will be sent to our staff members who are working directly with the grantees on the ground. You can expect answers back within three weeks.

It is extraordinarily important to be sensitive to the time limitations and the challenging situations that grantees and their intermediary partners are facing on the ground. For this reason, FSD respectfully requests that members of its hosted circles ask only one round of follow-up questions in response to proposals.

In gathering your questions there are several important things to consider:

- Don’t ask more than 5 or 6 questions.
- Be sure your questions are clear and leave space for explanation – in other words, yes or no questions will not provide much information and may not be as helpful as the circle hoped.
- There is a temptation to try to have every question answered to feel comfortable about making a grant. It is important to take a step back and consider which questions are appropriate and which are nit-picky. Remember that giving a grant means having some trust in the people and organization you are supporting.

Communication Issues

A concrete manifestation of the challenges of interfacing with grantees is in communication barriers. Many grantees do not have computers or easy access to the Internet. They often have to travel long distances to answer e-mails. Use of these communication tools also costs money. The conditions where such organizations operate are often extremely harsh, the challenges exceedingly difficult, and the funds few. Many of the leaders of these organizations get paid little, if anything. Challenges in the communication process should be viewed within that context, and the circle members should be encouraged to limit their communications expectations.

An Anecdote:

One of our Giving Circle members recently wrote to a prospective grantee to follow-up on questions from their proposal. Weeks had passed and members were beginning to wonder why the grantee hadn't responded and if they were interested in getting a grant at all. Several weeks after the deadline had passed for submitting responses the grantee wrote back profusely apologizing for not responding sooner, she had been in the field where there is no internet and was recovering from malaria.

facilitating the giving circle's group process

Each person who joins your Giving Circle should be aware that they are submitting themselves to a group decision-making process. In this sense, they are giving up individual control over how their funds are spent in exchange for the personal connection, support and greater resource leverage that comes with collaborative giving. But it is a trade-off, and for those who have very strong opinions or approaches towards how they give could have a difficult time. **This should be explained to all those who join your circle and should be reviewed in the first meeting.**

The friends, family and colleagues whom you have brought together to participate in this process are likely to represent a broad array of personalities, perspectives, political views, etc. There are those that have more outgoing personalities and have the tendency (usually with the best of intentions) to dominate talking space and others who are very shy. As facilitator, it is your job to make sure everyone is heard and feels comfortable speaking.

Below are some helpful hints on facilitation.

- **Be prepared:** Put in prep time, write an agenda, know how you would like the meeting to flow, and make sure your co-facilitator is right there with you. Circle members will be able to tell that you are well prepared and are leading them in a clear direction.
- **Know your role:** You do not need to be the expert. You are there to help guide the conversation. It's okay not to have an answer for something. If something comes up that you can't answer, acknowledge it and let the circle know that you will try to find out by the next meeting.
- **Guide the conversation:** Is someone talking a lot? Is there someone who hasn't spoken up at all? Don't let one or two personalities dominate a discussion. Ask what other people have to say about the topic. The recommended activities shared later in this document can help with this as you will have a cheat sheet of peoples opinions and can call on them to share, For example "Ryan, I see here that you ranked the Banudo Clinic as your favorite proposal, would you like to share why?"
- **Be flexible:** No matter how much prep work you do, things will pop up that you are not prepared for. If the needs and desires of the group are pushing in another direction- away from your plan, go with it.
- **Break into Small Groups:** If you find that the group's energy level is going down or you're not getting enough participation from certain members, we highly recommend breaking down into smaller groups and giving the groups a task. This can dramatically improve engagement and discussion. Tasks might be to think of questions regarding a particular proposal, to rank the proposals or, in the later meetings, to decide as a small group how you would allocate all the funds.
- **Keep time:** As facilitator you are there to move the meeting along. Be sure to be respectful of people's time and do not go over the original timeline. If you need to keep people for an extra 10 minutes, ask the members if this is okay.

Achieving Consensus

FSD's Giving Circles have emphasized a consensus-building approach to group process. We prefer this to majority vote on group decisions because we feel that it is extraordinarily important for all circle members to feel good about what they have decided and not alienated. However, reaching decisions by consensus can be challenging and requires compromise from everyone involved.

A great way to achieve consensus is by making compromises on grant amounts rather than whether or not to fund a particular group. There are times when one or more members of the circle will feel strongly about one organization that others in the group do not want to fund, and vice versa.

There is often a debate in our Giving Circles, which is common in the philanthropy field, as to whether funding should be concentrated among only one or two of the organizations from the larger portfolio being considered. The argument is that it is preferable to leverage the group's collective funds to make a strategic investment in a few organizations to achieve a broader scale of growth and impact. Others prefer what we would call a "spread-the-love" approach. All of the groups under consideration are doing outstanding work. They are all operating on a small budget and can make a small donation go a long way. This is also a diversification argument and spreading impact across organizations.

In our experience, Giving Circles rarely go to either extreme. However, because of the collaborative and consensus oriented nature of the process, decisions do tend to fall more into the diversification rather than the concentration direction. Compromise often entails one person or segment of the circle getting what they wanted in exchange for something else. Each person then feels that they got some of what they wanted and they can leave feeling generally good about the process.

The group exercises below are designed specifically to move the group towards consensus and should help the facilitator move in that direction.

group exercises and worksheets

Below are several group exercises that aid in the criteria-building and decision-making processes. A brief outline is noted below, more information on how to carryout these exercises can be found in the facilitators guide. See the Worksheets section in the appendix for all worksheets and facilitator guides.

- **Criteria Building Exercise:** This exercise is designed to help circle members understand what to look for when they are making personal donations. It's important that each member understands her or his own criteria and what's important to her/him. This is the first exercise and is usually done during the first or second meeting.
- **Proposal Initial Impression Worksheet:** This worksheet acts as a guideline for members while they are reading the proposals and helps them in tracking their first impressions. This is purely a template for circle members and is not a facilitated activity.
- **Grantee Ranking Exercise:** This exercise is designed to help the group narrow down the number of grantees under consideration. Members rank the organizations on a 1-10 scale. When the scores are put together there are often a few organizations that have much lower numbers, and can (with the consent of the group) be dropped from the pool of potential grantees.
- **Individual Allocation Worksheet:** In this exercise, each member allocates the total pooled funds as if it was an individual decision. This helps initiate the final decision-making process during the last meeting of the cycle.
- **Group Allocation Exercise:** In this exercise, the group is broken into two smaller groups and as a group is asked to allocate the group funding as if it were their decision. This is the final exercise and helps to make the first real funding choices.

learning resources

international grantmaking resources

Grantmakers Without Borders (<http://www.gwob.net>) is a network of foundations and individual donors who practice global social change philanthropy. They host a variety of conferences and learning calls that cover international grantmaking best practices and theme-specific learnings related to social justice.

Another comprehensive overview site is **United States International Grantmaking**, which is sponsored by *The Council on Foundations*. Please refer to their website for a host of general, legal and country specific resources (<http://www.usig.org>)

general philanthropy & Small Foundations

One of the best sources out there for information on best practices in philanthropy is the **Association of Small Foundations** (<http://www.smallfoundations.org>)

giving circle resources

There are also two primary resources for Giving Circles. Neither have a specific international focus, but they provide great advice, sample documents and connections with others who have started and run Giving Circles of their own:

Giving Circles Knowledge Center (http://www.givingforum.org/s_forum/sec.asp?CID=611&DID=2661)

Giving Circles Network (<http://www.givingcircles.org>)

getting personal support from FSD

We hope that this toolkit will provide you with a basic framework of practical tools and advice for running your Giving Circle. The staff of The Foundation for Sustainable Development are also here to help you through the process:

- In our initial contact, we will review some of the questions contained in this guide to help you decide upon a structure and format that works best in your situation.
- We will provide group communication tools through our website and help publicize and recruit members and donations for your circle to the extent that it is desired.
- You will have access to our Giving Circles Speaker Database for experts in your geographic area you might invite to speak at your circle.
- We will be the grantee liaison between your Giving Circle and an identified pool of grantees from our extensive international network of grassroots organizational partners in Africa, Latin America and Asia.
- We can provide support around issues such as recruitment, international grantmaking best practices and challenges in the group process.

One of the great benefits of hosting a circle at The Foundation for Sustainable Development is the hands-on support we can provide to make sure that the experience is a truly meaningful one.

We thank you for your interest and support of our partners across the globe trying to improve the quality of life for their communities. We also thank you for participating in this important engaged philanthropy movement that educates donors in responsible grantmaking for sustainable development.