

4 Steps to Starting
and Running a Successful
Giving Circle

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Chapter 1

The Problem

You want to help others. I know that because you're like me. I love helping people. So much so that at one point in time I was forbidden from answering my own front door, because I would buy the candy bar, get the magazine subscription, sign the petition, and make a donation.

I've learned though that I need to be more strategic about how I donate money. I work hard for my money, and it's a scarce resource. If I give a donation to an organization who squanders that money or, just as bad, works really hard to implement a program that doesn't make an impact on the problem, then that money is lost, the world fails to improve, and I've lost an opportunity to make a difference. My hard earned dollars failed to live up to their potential and failed to equal the effort I put into earning them.

It's not so easy for small donors like us to make informed donations that make an impact on the cause we care about, and we face two challenges.

Challenge One: Research.

When Bill Gates makes a donation, he has teams of people researching the problem and the organizations so that when he decides to act, he knows his donation is going to make an impact.

Be honest.... Have you ever made a donation and didn't bother to do any research?

Me, too. I haven't done research because I was too busy, it was too hard, I didn't know where to look, or I trusted the reputation of the organization. But there are three very real and very bad consequences of making a bad donation.

1. Your Donation Is Wasted

A few years ago I read an article about an oven made from cardboard boxes that uses solar energy to heat up. It won a climate change award and was touted as a solution for the global problem of deforestation due to the demand for wood for cooking fuel. An organization sprang up to provide these solar ovens to people across the developing world.

Recently, I read an article about this same solar oven that suggested that the reason this box hasn't been widely adopted across the developing world is that it solves a problem no one was looking to solve-- how to cook a hot meal in the middle of the hot day. For those people in the developing world who received a free solar oven, it has sat largely unused in the same way something you got as a present but didn't really want or need sits around your house. Before donating to a project, research needs to be done to discover if the project is solving a problem that people actually want to solve and that people will adopt.

2. Your Donation Is Embezzled

Greg Mortenson wrote the best selling book “Three Cups of Tea” which detailed his ordeal in Afghanistan that involved him failing to summit K2, getting lost on the way down, and stumbling into a small Afghanistan village. The members of the village nursed him back to health and in return he promised to build them a school. During this time, he was kidnapped by the Taliban and secured his release by asking for a Koran from his captors and promising to build schools across Afghanistan. He went on to start a foundation, the Central Asia Institute, that would raise money for building schools across the world. It’s a beautiful story that inspired nearly \$60,000,000 in donations over 10 years.

You know where this story his heading, right? You can watch the “60 Minutes” expose here: <http://www.youtube.com/watch?v=XhAb37yZ0o0> . I’ll summarize what happened. Large parts of his time in Afghanistan are entirely fabricated. He successfully summited K2 with a friend, he did not go to a village, and he was not kidnapped by the Taliban. All of that could *possibly* have been justified if it resulted in thousands of children receiving an education.

But that didn’t happen either. It turns out that most of the foundation’s spending was for “domestic outreach”-- aka travel expenses for Mortenson’s speaking engagements. Although he was selling books and collecting speaking fees during these speaking engagements, the foundation does not receive any of those fees. Worse yet, in 2010, they claimed to have built or supported 141 schools. “60 Minutes” managed to visit 30 of the claimed schools and found that 1/2 were empty, not receiving support from the Central Asia Institute, or entirely non-existent.

Some research would have shown that the Central Asia Institute had only a single audited tax return. A brief review of their 1009 tax forms would have shown exorbitantly high non-program related costs, and some critical thinking would have revealed that the \$23,000,000 raised in 2010 built 141 schools at an approximate cost of \$163,000/school-- a cost that is 10 times more than other non-profits are building schools for.

If the generous people who sent their money to the Central Asia Institute in hopes of educating children had done research before donating, it’s possible that despite the emotional appeal of Greg Mortenson’s story they would have chosen an organization that had fewer red flags, and this appalling situation would not have happened.

3. Your Donation Hurts the People You Are Trying to Help

What’s worse than lack of effectiveness or fraud? How about when a project that our money funds ends up harming people? If you’re like me, the thought of a child alone, without his or her parents, trying to take care of themselves is heartbreaking, and you may send money to an orphanage-- perhaps one in Haiti to help all the children who have lost their parents in the earthquake. Our hope would be that these children who have nowhere else to go would receive food, shelter, an education, and an opportunity for a better life. And we wouldn’t be alone. There are over 600 orphanages in Haiti alone, most of which are receiving support from well-intentioned international donors.

Unfortunately, orphanages are a terrible way of providing care to children. One reason for that is that orphanages are good business and children are vulnerable to exploitation. In fact, one couple in China alone sold 85 babies to government run orphanages, which were in turn selling them in international adoptions. According to the article, the Chinese government acknowledges that each year 30,000 to 60,000 children go missing-- most of them abducted (<http://articles.latimes.com/2010/jan/24/world/la-fg-china-adopt24-2010jan24>).

It doesn't just happen in China, but every place where orphanages pop up. As a result of the profitability of orphanages, many children who are not orphans end up in them. Save the Children, the world's leading independent children's rights organization, reports that nearly 40% of children in Zimbabwe orphanages have a living parent, 92% of children in private residential institutions in Sri Lanka had one or both parents living, 70% of children living in institutional care in Azerbaijan have parents, and of their assessment of 49 orphanages in conflict-stricken Liberia, 98% of the children had at least one surviving parent (http://www.savethechildren.org.uk/en/docs/Misguided_Kindness.pdf).

As if that wasn't bad enough, the body of evidence shows that orphanages are damaging to children. Save the Children's 34 page report "Keeping Children Out of Harmful Institutions" reviews a large body of scientific studies about children in orphanages documenting their increased risk of abuse, exploitation, disease, their decreased emotionally and intellectual development, and reduced economic and social opportunity. One study of Romanian children found that for every 2.6 months spent in a Romanian orphanage, a child falls behind one month of normal growth, had significantly lower IQs and levels of brain activity, and were far more likely to have social and behavioral abnormalities such as disturbances and delays in social and emotional development, aggressive behavior problems, inattention and hyperactivity, and a syndrome that mimics autism (http://www.savethechildren.org.uk/en/54_9678.htm).

Yikes! We thought we were doing a good thing. Had we done some research into the issue of orphanages and child care, we would have discovered that orphanages are the last possible choice for providing child care and that supporting families to take care of their own children and their relatives children is more effective and cheaper. If we were really committed to supporting orphans, then we would have to do some serious work to find a reliable orphanage truly providing good care for the right reasons.

As small donors with jobs, families, and responsibilities, it's difficult to find the time to do the necessary research before sending money, and yet when we don't, we risk having our money wasted, embezzled, or hurting the people we wish to help. Obviously, research is imperative, and Chapter 2 will discuss how a giving circle eases the burden of research by sharing it across the members of the giving circle.

Challenge Two: The Amount

Bill Gates is donating a lot of money, and the sheer volume of money that he puts towards a problem makes an impact. But when I make a \$25 donation to the Red Cross, I don't really feel like I'm making an impact on the Red Cross or on the causes that they support.

Have you ever sent in a check and thought, well, it might not do anything, but at least I gave?

I know that I've felt that way. But I want you to know that your small donation is a big deal and that people like us donate way more money than Bill Gates. Do you remember the tsunami that hit south east asia in 2004 causing 10 billion dollars in damage and killing 350,000 people?? Everyday American citizens donated \$2.78 billion dollars for tsunami relief. And I mean everyday Americans. The average donation size was only \$135 dollars, and the median donation was \$50. These were people giving what they could, because they wanted to help.

Let's think about how big \$2.78 billion really is. \$2.78 billion was 3.5 times more than the U.S. federal government gave, and it made up 45% of all tsunami relief dollars world wide. Think about that for a minute.

All of the world's governments, all of its corporations, all of its foundations, all of the citizens from every other nation COMBINED only gave a half a billion dollars more than everyday Americans.

Did you have any idea that your small donation added up to so much??

In fact, people like us donate way more money than Bill Gates. In 2007, donations from individuals added up to \$229 billion dollars which was 114.5 times MORE than the Bill and Melinda Gates Foundation.

If you don't feel like you're small donation is a significant as theirs, it's understandable. A large donation by a single individual is exciting for the news to cover, so they like to talk about Warren Buffet's commitment to donate \$10 billion to the Gates Foundation over his life time. But the fact that you're part of a group that donates so much money that \$10 billion looks like chump change isn't neatly packaged into a sensational headline and a 30 second news story.

The reason we don't make headlines is that we're donating separately as individuals in small amounts throughout the year. The truth is that while your small donation combined with the small donations of many other Americans are critical to non-profits, your impact is smaller than what it would be if you teamed up with a group of people to make one large donation. A giving circle allows you to make larger donations at one time and make a bigger impact on an organization.

Chapter Two

The Solution

The solution to the problems of bad donations and donating in small amounts is to donate through a giving circle. A giving circle is simply a group of people who pool their donations, because they know that giving money matters, even a little bit of money matters, and by giving as a group, they exponentially increase the impact of their donations.

A giving circle can be as simple as four friends chipping in a few bucks to help support a family in crisis. Or a giving circle could be an elaborate organization of hundreds of people led by a board coming together in a meeting to vote on which organization the group will support. It could be anywhere in between or something entirely different. The only characteristic that defines a giving circle is that members pool their monetary contributions so that they give out larger amounts of money as a group.

While there are hundreds of official giving circles across the country today, the concept of a giving circle is ages old. In the Christian culture, tithing operates as a giving circle and allows the church to fund projects that single individuals would never be able to do on their own. A traditional Korean organization, a kye, has its members contribute a set amount of money that is pooled and available to members of the community in times of crisis, hardship, or for an opportunity such as buying a business.

A giving circle operates on the principle that the community is a powerful resource, and there are four reasons why a giving circle is a powerful way to donate money.

1. You leverage your dollars.

Maybe you can only give \$25, but if you recruit 9 of your friends, then you just donated \$250. If you did that every month, in one year you will have donated \$3,000. Do you think that \$3,000 is going to make a bigger impact than \$25? You bet!

And this isn't just a theoretical exercise. The Rochester Women's Giving Circle was founded 4 years ago with 5 members. Since then, they've grown to 80 members and have donated more than \$250,000 to organizations in their community. The Giving Circle of Alexandria and their 135 members have donated more than \$350,000 to their community in the last six years.

Would you like to be part of a group that donates hundreds of thousands of dollars to a cause that you care about? It's possible, and it doesn't take a lot of people and it doesn't take a lot of time. It does take a commitment to get started, and I'll be covering the action plan in a few pages. Bear with me though as I build up the argument for why you want to start a giving circle!

2. You leverage your time.

The best defense for preventing our donations from being misused or wasted is a good research offense. Like me, I'm sure you're a busy person. When you donate as part of a giving circle, you

get to share the work of discovering which organizations are going to make the biggest impact on the problem. Who wants to work on this part of this project? Who has time this month? No one person is responsible for all the work, so you can make informed donations in less time by not relying on just yourself for all the hard work.

3. You leverage your intellectual resources.

The Japanese have a saying that “None of us is as smart as all of us”, and I find that to be especially true in a giving circle. Have you ever noticed that other people know things that you don’t know or have experienced things that you haven’t experienced or maybe even ask questions that you haven’t thought to ask? A giving circle can make a better informed decision because they benefit from the collective wisdom of the group.

Each time we donate money, I’m surprised by the new organizations I learn about that members have suggested as possible grantees. The first place that I learned of the traditional 90% euthanasia rates of traditional animal shelters was in a discussion that happened when we were discussing if we should fund the construction of a no kill animal shelter in Detroit. I’m amazed with how much deeper my understanding of my causes has grown due to the knowledge that my fellow giving circle members have shared with me.

4. Donating becomes more fulfilling.

I speak with people all across the country about their giving circle and they all tell me the same thing: a giving circle is a profoundly rewarding way to donate money. It’s more fun, because you’re sharing the experience with other people like you who care about the same cause that you care about. The relationships and friendships created in a giving circle are a big reason why many people across the country continue to participate in giving circles year after year.

Plus, when you’re involved with your donation dollars by researching, voting, and following up on the impact your dollars have made, you experience a whole other level of satisfaction. You invest some of your time and energy in your donation, you’re not just donating money. You’re donating a part of yourself. When you hear back how that donation helped, it’s as if you physically helped that person. I can’t explain it better than that, so you’ll have to trust me-- at least enough to try it yourself and see if it’s true for you, too.

Give Better. Give With Others.

We are compelled to donate for many different reasons. Maybe it’s because we feel like it’s our duty and responsibility to give back. Maybe we care about people and want them to have some of the same opportunities that we had. Maybe it’s because we don’t want people to suffer through the same things we went through. Maybe it’s because we feel religiously or spiritually called to donate. Whatever your reason, people like us give, and we give a lot. And since we’re giving out so much money, we owe it to ourselves and to the world to donate wisely.

A giving circle helps us give better by giving with others. We leverage our time, our money, and our intellectual resources to make a really big impact on the world and on a cause we care about. As the cherry on top, we'll enjoy donating more. That's what I call a win/win/win/win scenario!

Chapter 3

Additional Resources

My intention was to keep this book short and simple with a laser focus on the goal of getting a giving circle up and running as quickly and easily as possible. Obviously, that meant lots of additional information had to be left out, so I'd like to point you in the direction of more information.

Change Gang's Blog

www.changegangs.com/blog

At this blog, I write about my virtual giving circles which I refer to as Change Gangs. Get inspiration about giving, ideas of what we're doing and how we're doing it, who we've donated to and why, and hear from current members about their experiences.

Giving Circles Help

www.givingcircleshelp.com

At this website, I'm compiling interviews with giving circle leaders from across the country. You'll find lots of great information about the many different structures a giving circle can take, the many different methods for donating money, the different ways to market a giving circle, recruit new members, and engage existing members.

Join an Existing Giving Circle

www.changegangs.com/join

This is where you want to go if at any point you want to be a part of an existing virtual giving circle already working on a cause you care about.

Me

www.changegangs.com/contact

I've devoted my life to giving circles, and I'm happy to talk with you about yours. Do you have questions about how to get started? Are you struggling with a particular problem? Do you want to capture your giving circle's story for others to learn from for the www.givingcircleshelp.com website? Use the contact link above to reach me.

The Giving Circle Knowledge Center at the Giving Forum

http://www.givingforum.org/s_forum/sec.asp?CID=611&DID=2661

I used this resource extensively as I was setting up my giving circles. You'll find all kinds of great information and advice covering nearly every topic you'll need to think about when you're setting up your giving circle.

Chapter 4

The Action Plan

By now you're convinced. You realize the pitfalls of donating money, and you know that as part of a group, you'll be able to donate more effectively. You know that a giving circle will help your hard earned dollars make an impact on the world. And you're looking forward to donating being a fulfilling and rewarding part of your life.

Fantastic! The good news is that there are only 4 steps to creating your own giving circle, and I'm going to walk you through each step. I'll introduce each step which will be followed up with either a worksheet or a checklist for you to work on. At the end of the steps, I have an Action Plan overview, so that you're clear on what you need to do.

You could have your own giving circle up and running in as little as a month, but don't wait to get started. You'll love the experience of donating through your giving circle, so the sooner you get through these steps the better!

Step One: Connect

A giving circle by its nature involves other people, so the first step involves talking to and connecting with other people who care about the same issues that you do. The most important people to connect with first are your founding members. These are the people who will help you through the remaining steps, they will help you recruit new members, and research potential grantees. Your founding members will be integral to launching your group, so you're looking for people who

- you like, because what's the point in spending a lot of time working on issues with people you don't enjoy? You'll just end up getting burnt out and want to quit.
- are personable. You'll be growing your group, and it will help if your founding members will naturally share your activities with others.
- are enthusiastic, because they'll spend more time on the giving circle.
- get things done, because things will need to get done.

Talking To Your Potential Founding Members

The worksheet will walk you through finding people you can talk to about your desire to start a giving circle around a particular issue. I strongly encourage you to talk from your heart about what you want to do and why you would like them to participate. You will be your most effective salesperson, and your passion will be contagious. Perhaps you want to focus on a particular challenge your community is facing. If you can describe that problem, then paint a picture of a future where that problem no longer exists, and let them know how they can be a part of that solution, other people will want to be part of your efforts.

It's possible that some of the people you talk to will be interested in participating but not interested in being a founding member. Keep track of those people and invite them to get involved at Step 3. The worksheet has a place to keep track of those people.

Below is a sample dialogue I adapted from what I said when I was talking to people, but make sure to change it so it sounds like you. Remember, it's your passion, your enthusiasm, and your vision that will attract people.

Sample:

I know you're a very busy person. I also know that you're the sort of person who wants the world to be a better place because you were here which is why I thought of you and want to share with you an idea I have.

I want to see a world where {talk about issues}

So, what I want to do is create a giving circle. It's a group of people who agree to donate a set amount of money, then we get together to choose where we're going to donate that money.

The idea is that as a group we can give a lot more money and make a much bigger impact on the problem. I would love to be able to donate (put large dollar amount here) through this group. Wouldn't that be amazing?

Plus, since we're doing it together, we can benefit from each others' experience, research, and insight, so we not only give bigger, but we give better, too.

Does (brief summary of issue) interest you?

Start Small With The Right People

With few exceptions, giving circles start out small. They often begin with a few friends over a kitchen table wondering how they can make a difference. It's always the case of quality and not quantity. Your founding members will set the tone for the group, act as leaders and guides for what is possible, and promote the giving circle to friends and family.

You don't want to carry the weight of the giving circle all my yourself. If you do, your giving circle will begin to feel like a job, and you'll get burnt out. Choose a few good partners who will not only help you reach your goal but help you enjoy getting there, too!

Step One Worksheet

Creating Focus and Connecting with Others

Overview: You're looking for two or three other people who care about the same issue and want to be a part of making the world a better place. This worksheet will guide you through getting started.

List all the issues that I care about and would like to improve:

What two or three issues are most important to me?

Action: Choose either one issue or two issues to talk about with people. The issue(s) I will talk about is/are:

Will my group meet locally or virtually:

Who do I know off the top of my head who might also care about these issues and would make a good founding member? If your group will meet locally, then only list people who live close to you.

Action: Call or email these people. Talk from your heart about what you want to do and why you would like them to participate. See the introduction to Step 1 for a sample email you can adapt.

Where else do I talk to people (church, softball team, work, pta meeting, gym, etc)

Names of people from these groups I can reach out to and talk about my giving circle.

Scroll through your address book, your FB friends list, and any other places you store people's names and write down the names of people you can reach out to and talk about your giving circle.

Set Goal: Talk with _____ person per day about your idea until you have two or three people who are interested in starting a giving circle with you.

***Action:* Talk with _____ person per day about your idea until you have two or three people who are interested in starting a giving circle with you.**

Names of committed founding members:

Names of interested founding members:

Names of potential giving circle members:

***Action:* After locating a few founding members, schedule a meeting to set the rules of your giving circle (Step 2).**

Step Two: Set Your Rules

So you've found two, three or even five people interested in creating a giving circle with you, now what?

Now it's time for you and your founding members to set up the rules. The rules help you and your founding members know what you're doing, why you're doing it, and how you're doing it. The rules focuses your efforts, helps avoid unanticipated scenarios, and reduces conflict when everyone knows how your circle operates.

The [Giving Forum](#) provides some excellent resources for [starting a giving circle](#), and I highly recommend reviewing their site and printing out their materials. In addition, I've compiled a checklist of important items you should cover with your founding members. The answer to some of these questions will be "no" or "not right now". For example, you and your founding members may not want to take on the formal structure of having a board or you may decide to wait until you have 20 members and then have an election.

I suggest planning at least two founding meetings. At the first meeting, you'll create some items that will need further research or development, so plan a couple weeks in between for members to work on the action items that arise from these meetings.

As you work through these questions and the materials you find at the Giving Forum, it's very likely you'll have questions about what is the best path for your giving circle to take. You may wonder, do we need bylaws? or Is it ok to accept different donation amounts from different members?

First, I want you to relax. There isn't one correct answer. Thousands of people all across the country are participating in giving circles with their own unique strategies. In time, you'll discover what works best for your giving circle, and you'll make changes. The important thing is to start. Don't worry about getting it perfect right off the bat. Give yourself permission to start small, to try out one strategy, and to change it if it doesn't work for you.

Second, I highly recommend checking out the [Interviews](#) at www.givingcircleshelp.com. You'll hear from giving circle leaders across the country and discover many different, interesting, and helpful strategies. For example, 100 Women Who Care on the Central Coast chooses their donation nominees randomly while the Giving Circle of Hope solicits grant proposals. Which one sounds interesting to you? In the beginning, it doesn't hurt to err on the side of simplicity and to grow into more complex structures.

Step Two Checklist

Starting a Giving Circle

- Write Vision Statement clearly laying out the group's focus
- What is our group's name?
- How many times per month/per year will we meet?
- Where will the meetings be held?
- If meeting occurs in person, what are refreshment arrangements?
- If meeting occurs virtually, what are meeting tools?
- How large do we want the group to be? Is there a meeting cap?
- What is strategy for recruiting new members?
- What are procedures for accepting new members to the group.
- How much will we donate every month?
- Where will funds be held?
- Who will have access to funds?
- What is appropriate use of funds? (for ex, are expenses such as food allowable?)
- What are procedures for disbursing funds?
- What are our criteria for eligible recipients (non-profits, for profits, individuals)?
- What are our procedures for nominating potential recipients?
- What are our procedures for determining the amount of potential donations?
- What are our procedures for discussing nominees?
- What are our procedures for voting on nominees?
- What are our procedures for breaking a tie?
- Will the group have leadership? (president, vice-president, treasurer, secretary)
- What are procedures for electing and replacing leadership?
- Write out pertinent information into By-Laws.
- Provide members with copy of By-Laws.
- What is our strategy for keeping existing members engaged and enthusiastic?
- How do we determine the effectiveness and impact of our group?

Step Three: Grow Your Giving Circle

Congratulations! So far, you've done a couple things. First, you've managed to find a few founding members. One of the best parts about being in a giving circle is being connected with fun, friendly, positive people who want to make a difference. Good job on bringing these people together! These relationships will not only add to the quality of your life, but to theirs as well.

Second, you've established or are in the process of establishing your rules. This step can take some time, so it's important to keep track of what still needs to be accomplished. It would be sad if months went by and you still hadn't taken action on your desire to make an impact on the world. Don't let that happen! Start small, start simple, and start now.

And remember, you can always [join an existing giving circle](#) with us and start making a difference right away. We'd love to welcome someone who cares about the world as much as you do to one of our virtual giving circles.

Now on to step 3: Grow your circle.

In the beginning, you will need to make a concerted effort to recruit new members to your giving circle. At some point in the future when you have enough members and get enough publicity, potential members will be attracted to your group and seek you out. In the meantime, you need to work it!

Here are a few suggestions on how to grow from your core group of founding members to a vibrant, thriving giving circle donating thousands of dollars for causes you care about.

Social Networking: If your group meets virtually, be sure to talk about your gang's activities on your Facebook, Twitter, or other social networks. You can post reminders about your mission, notices about upcoming meetings, and who you've donated to and why. If you meet locally, you can still use social networking, but consider directing the messages just to people who live nearby.

Emails and Phone Calls: Refer back to the exercises in Step 1 for help creating lists of people you know and reach out to them personally through email, phone calls, or Facebook messages.

Publicity: Think about press releases or other media coverage for your upcoming events or to publicize your past successes. Local newspapers often have a section devoted to what people in the community are doing, and it's the perfect place to mention an upcoming grant cycle or to brag about how much money you've just donated.

Similar Interests: Where do people who care about the same thing as you congregate? If you're involved in an environmental giving circle, then a hiking club may be a great way to meet people. If you're involved in a giving circle promoting animal welfare, then volunteering at a local animal shelter could introduce you to possible new members. Think about internet communities, too. Are there forums where people talking about your issue? Get involved in that community.

Word of Mouth: All of the giving circles I have interviewed tell me the same thing: word of mouth is the single largest way new members join. So, communicate to all your members that they should be talking about what their giving circle is doing to people they care about.

Welcome Guests: When new members check out a meeting, make them welcome, and follow up with them.

Support New Members: When new members join, make a big deal about it and match them with a current member who can help them feel comfortable.

Set A Goal

You may or may not be a strong believer in goals. For me, I find them very effective, and one goal that I've set for my giving circles is for every member to invite a guest to every meeting. Of course, not everyone gets a new guest to attend every meeting. But it helps your members understand their responsibility in growing the giving circle, and as a result, your members will get enough new guests to attend that your group grows.

Talk About Results

The single biggest reason people will continue to participate in your giving circle is because they feel it matters. So it's very important that you communicate results at every meeting. Results includes things like how many members you have, how many new members have joined, how much money you have to donate, and how much money you've donated.

Another important way to communicate results is to review the impact of your donations. You can do this by inviting the organization to speak at a meeting, by reading a letter from the organization or a recipient of that organization's efforts, or by reviewing and emphasizing the organization's work that your donation allowed to continue.

Step 3 Worksheet

The Growth Plan

What is our vision for our ideal giving circle (write a description including size and amount of money donated).

How many new members would we like this month? in 6 months? in 12 months?

Refer back to Step 1. Who did I write down who was interested in participating but not founding the giving circle? How will I get these people involved now?

Refer back to Step 1 for exercises for creating a list of people to reach out to about my giving circle. How will I reach out to these people?

Which strategies will we use to attract new members?

How will we encourage and empower existing members to invite new people?

How will we welcome new members?

What strategies will we use to keep current members stay engaged and enthusiastic?

How will we incorporate talking about the results into our meetings?

Step Four: Maintaining a Healthy Giving Circle

So far, you've taken the steps you needed to launch a giving circle. You've found some people who are joining with you to make a big impact on the world. You've set up your ground rules and put the infrastructure in place to run your giving circle. And last but not least, you're working on growing your group.

Remember that you are always welcome to [check out a virtual giving circle with us](#), so if you find that despite the best of intentions, you just haven't gotten around to starting your giving circle yet, don't wait to experience the joy of making significant and meaningful donations. You get to skip all the hard work and go right to making a difference with a group of people already working on a cause you care about.

You'll need Step Four about 6 months after you've launched your giving circle. At this point, it's likely that you still have some work to do, and it's likely that your group is still small. And that's wonderful! Every movement starts small. It starts with a leader and a few followers, and then with time and diligence, the movement grows, the group grows. Starting a movement isn't easy, and it doesn't happen overnight. Eventually you'll reach a place where it takes on a life of its own, where people are attracted to you and your activities, and recruiting new members becomes easy.

To get there though, requires work. Part of that work is reviewing your group to make sure you're on track, because over time, things have a habit of changing. This is both good and bad. It's good to acquire new experiences and develop more effective and efficient ways of running your giving circle. It's also possible that over time, you may drift a bit from your original intention. It's also possible that there are areas that are in need of improvement. The day to day routine of running a giving circle is not the best way to take a good look at the overall health and direction of your giving circle. For those reasons, I recommend that every six months, you and your giving circle's leadership conduct a formal evaluation of your giving circle.

Step 1: Survey Your Members

In preparation for your review, survey your existing members. You can use or adapt the Membership Survey I've included, or you can develop one of your own. The important thing is that each of your members share their opinions on what is going well and what could be improved.

This is important for at least two reasons. One, your members may have great insight that will help your group improve. Two, when members know that their opinions are wanted, valued, and listened to, they will have a sense of ownership and involvement with the giving circle that makes them more likely to stick around and participate. And you want members to stick around and participate!!

Step 2: Leadership Meeting

With the completed membership surveys, the leadership should complete a thorough review of your giving circle. I use the Leadership Meeting Worksheet that follows to help us cover all of our bases in my giving circles. You may want to add some items that are appropriate for you.

During your review, look for things that are working well and that you definitely want to continue. Identify areas that could run more effectively and more efficiently. Evaluate your membership. Do you need to grow? Increase retention?

Your biannual review should end with an action plan on what activities and actions to focus on in the next six months to make your giving circle even better.

Step 4

Membership Survey

What do you enjoy about our giving circle?

Do you feel like our giving circle is making an impact?

Do you invite guests to meetings? If no, why not? If yes, how are you inviting them?

What suggestions do you have for recruiting more members?

What activities or actions would you like our giving circle to do this upcoming year?

Do you think the giving circle's leadership is doing a good job? Why or why not?

What could be improved?

Step 4

Leadership Meeting Worksheet

Review giving circle's activities. Do they make sense for the direction the giving circle is going? Do we need to add or change giving circle interactions?

Is the giving circle's vision still clear and being followed?

Review giving circle's dynamics. Is it healthy and getting along well?

Review donations. Are they consistent with our mission? Are they having the desired impact?

Review membership numbers. Do we need to recruit more members? Is the giving circle losing members? Are guests becoming members?

Review New Member procedures. Are new members becoming active members of the giving circle?

What's working well? What's not working well?

How are our organization nomination and selection processes working? Are organizations properly vetted?

Are we doing a good job promoting our successes?

How could we have a greater impact?

What do our members say they want to see happen?

How is our leadership election and succession working?

Are our finances in order?

Are we maintaining records of giving circle activity?

What are action steps for next 6 months?

In A Nut Shell

Here's the brief overview of all the steps we went over. Yep, it's that simple. You can do this!

Step 1: Connect

- Pick A Cause
- Recruit Founding Members

Step 2: Set Your Rules

- Review the checklist and establish the ground rules for how your giving circle operates

Step 3: Grow Your Circle

- Pick the strategies your group will use for growing your group and engaging members.

Step 4: Maintain Your Circle

- Conduct Member Surveys and Leadership Reviews every six months.

Chapter 5

Conclusion

People just like you are starting and running giving circle's around the country, and they're loving it. I'm including a few of the stories of other giving circles in which you may find ideas and inspiration. I hope that your giving circle journey is filled with enjoyment and meaningful contributions. If I can be of further assistance, you are welcome to [contact me](#).

Diana Katz helped found the [Giving Circle of Hope](#) in 2004 with a few other friends who wanted to donate money in a better way. Since then, they've grown to over 100 members and have donated \$350,000 to organizations in their community through an elaborate grant process. Listen to her describe their grant process here: <http://givingcircleshelp.com/2011/10/21/giving-circle-of-hope-interview-how-they-grant-money/>

Ted Caine, founder of the [Citizens Care Giving Circle](#), established a truly unique giving circle that allows members to choose which individuals or families to support. Their website allows members the amazing satisfaction of helping one person in exactly the way that person needed help. In our interview he shared a story about how they provided an apartment for a woman who only had a few months left to live, and how their giving circle finds and checks out the people who are requesting help. Listen to his interview here: <http://givingcircleshelp.com/2011/09/14/citizens-care-giving-circle-foundation-interview/>

[Rochester Women's Giving Circle](#) in just 4 years has grown from 5 members to 80 members and donated over \$250,000 to organizations in their community that help women and children achieve economic independence. If you've ever struggled with how to say no to an organization or grant request, you'll appreciate hearing their advice and how their emphasis on funding projects gives them a laser like focus to fund only the organizations they can fully support. Listen to co-chairs Paula Carter and Shirley King share their story here: <http://givingcircleshelp.com/2011/08/31/rochester-womens-giving-circle-interview/>

[The Giving Circle of Alexandria](#) has donated over \$350,000 to their community over the past 6 years. They focus specifically on issues promoting parental engagement and over the past 5 years have helped many local organization become self-sufficient. They are now entering a new phase and hoping to develop a "Playground in a Box" model which they can use to create playgrounds

across their community: <http://givingcircleshelp.com/2011/08/17/giving-circle-of-alexandria-interview/>

Giving circles don't have to be serious work. The [Frederick Giving Project](#) was founded by two young women who bring a lot of fun and a little irreverence to the idea of giving circles. They prefer to host house parties and engage in visible service projects to effectively recruit members. In two years, they've grown to almost 80 members, so they must be doing something right! Listen their interview here: <http://givingcircleshelp.com/2011/06/14/the-frederick-giving-project/>

[100 Women Who Care on the Central Coast](#) started with 8 members at the end of 2009. By mid-2011, they had grown to over 40 members and had already donated \$10,000 to their local community that year. They choose their nominees randomly out of a hat, and give away prizes during their meetings. You can listen to Whitney Brandt talk about her circle: <http://givingcircleshelp.com/2011/04/25/100-women-who-care/>

I've talked a lot about how big giving circles can get, but the [Birmingham Change Fund](#) has intentionally stayed small. It's a giving circle composed mainly of young African American professionals and they value the deep relationships they've created. During our interview, we talked about how they responded to a local tornado. He also has great advice for starting a circle and getting connected with a host. <http://givingcircleshelp.com/2011/06/08/birmingham-change-fund/>