

Designing a Giving Circle Initial Brainstorm Guide

What will your giving circle focus on? What type of organizations will be funded?

How will your giving circle operate? Who will run the circle?

What type and how many members do you hope to engage?

How much will circle members give? Will there be a minimum? Will it vary or be the same for everyone?

What services will you provide to your giving circle?

- Soliciting proposals/ identifying potential grantees
 - Reviewing/ vetting proposals
 - Recruiting giving circle members
 - Managing donations and/or grants
 - Contributing to or matching gifts made to the giving circle
 - Educational opportunities
 - Social opportunities
 - Communications/PR for the giving circle
 - Evaluation of the giving circle
 - Evaluation of the grantees
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Why are you hosting the giving circle? To reach out to new donors

- Reach out to a more diverse range of donors
- Strengthen relationships with or among existing donors
- Accommodate the request of a donor or potential donor
- Increase community visibility
- Increase grantmaking capacity or fill a grantmaking gap
- Be introduced to new organizations
- Contribute to a culture of philanthropy in the community

How will you structure membership?

- Intermittent--Participation fluctuates from event to event
- Constant--Participation is for a fixed term (e.g. members renew annually)

How will funding recipients be chosen?

- Consensus--all members agree upon which funding recipients and at what level
- Majority Rules--Members vote on all recipients and majority rules
- Board or Committee--Decision is made entirely by a board or committee
- Nominate/Vote--Members nominate or vote on a slate; board or committee selects recipients
- Nominate/Individually Fund--Members or committee nominate; members decide to individually fund or not

What do you see as the potential costs to manage this giving circle?

Will you assess a fee on the giving circle? Yes / No

If yes, how will you calculate that fee?

- Flat fee
- Fee based on the percentage of annual giving circle assets
- Fee based on the percentage of annual giving circle's grantmaking
- Fee based on amount of work required from the CF

What challenges are you worried about as you begin planning to host a giving circle?

- Covering costs of hosting
- Staff time required
- Differences in missions between the giving circle and your organization
- Lack of communication between giving circle and your organization
- Technology challenges (managing circle database within organizational database, managing flow of proposals for the circle members, etc)
- Differences in expectations between giving circle and your organization
- Other: _____