

Pop-up Giving Circle

Training Deck



Hello!

OVER THE COURSE OF THIS PRESENTATION YOU'LL LEARN EVERYTHING YOU NEED TO KNOW TO HOST A *POP UP GIVING CIRCLE* EVENT. WE'LL COVER:

OVERVIEW

- Giving circles • Amplifier • Pop-up Giving Circle •

POP-UP GIVING CIRCLE TRAINING

- Essentials for hosting the event •
 - Facilitation tips •
- Organizational guides that will introduce you to potential grantees •
 - How to handle your attendees' donations •
- Pop-up Giving Circle vs full-scale giving circle experience •
 - Reporting back – and getting reimbursed! •

OVERVIEW GIVING CIRCLES

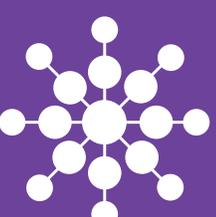
What is a giving circle?



When a group of friends, family, or co-workers pool their charitable donations and decide together where to give...



...it's called a giving circle.



Amplifier is a global network of giving circles motivated by Jewish values and inspired by changemakers who are making a difference.

Members of **giving circles** report that they love the model because it's:



Hands on

inviting you to engage deeply with values, issues, and causes alongside others you respect



Transparent

letting you see clearly where your money goes



Leveraged

both financially, in that you combine your contribution with others', and intellectually, in that you benefit from the wisdom of others in the circle



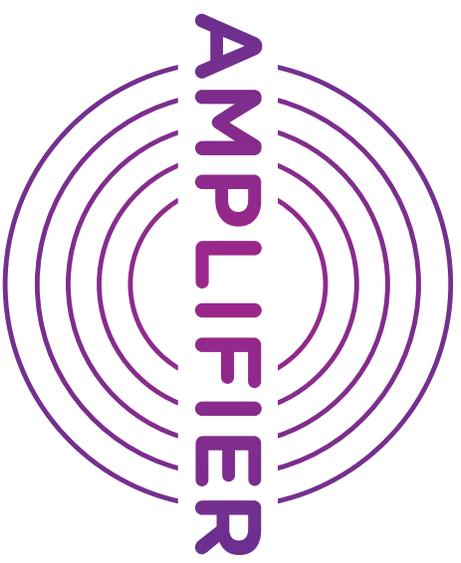
Empowered & strategic

starting from the values and issues you hold dear, and giving pro-actively according to a clear, coherent vision



Social

gathering and breaking bread with friends, and building a community with a shared desire to make an impact



Networks
Jewish giving circles

Catalyzes
the creation of new giving circles

Educates
circle members on best practices
in philanthropy

Connects
organizations and Jewish giving circles to
each other efficiently & effectively

AMPLIFIER OFFERS...

Online

- Resource Library with guides, excercises, case studies
- Giving Circle Directory
- Organization Directory
- Common Grant Application
- Circle Tools to manage grantmaking, events, and member communications

Offline

- Coaching and mentoring for giving circles
- Workshops, webinars, and in-person convenings
- Connecting giving circles to each other and to topic-area experts



OVERVIEW

POP-UP GIVING CIRCLE



Pop-up Giving Circle is a 90-minute version of the whole giving circle experience.

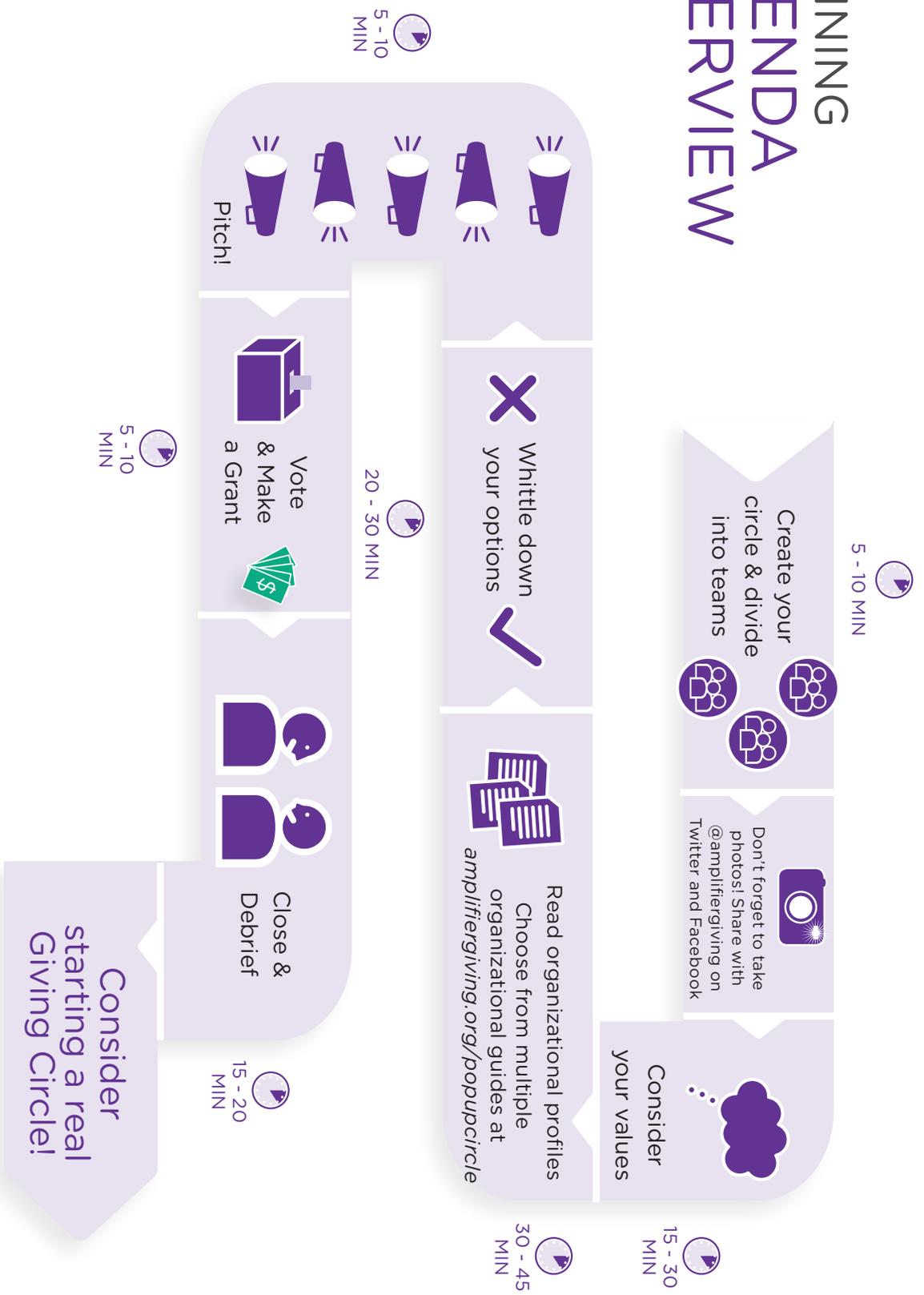
It's designed to give you a taste of what a giving circle is like, while keeping prep time and commitment to a minimum.

Lasts from
1.5 - 3 hours

Engages all attendees in discussions about values, causes, and organizations

Results in a real grant(s) to a nonprofit(s) you choose together

TRAINING AGENDA OVERVIEW



TRAINING HOSTING

To be a great host for your **Pop-up Giving Circle**, here are a few tips to think through in advance and during the event so that everything runs smoothly.

Space

Pick a location that can comfortably support the number of participants you are hoping will attend.

Invites

Calendars fill up quickly! Try to invite people as soon as you can to give them enough advance notice, at least two weeks is a good rule of thumb.

In your invite, share the high level logistics for the evening — location, start/end time, and an overview of what to expect.

TRAINING HOSTING

Event Logistics

Set up your space thinking about how people will move around during the different steps of the **Pop-up Giving**

Circle process.

- Will you break people into groups?
- Where will those groups sit and discuss?
- If you have limited space, how can do you still complete the different exercises?

Prepare the supplies and materials you'll need for your event:

Food and drinks

- Providing refreshments helps create a relaxed atmosphere, and makes the event more fun!

Copies of Materials

- You can find our Facilitators Guides and Participant Workbook at amplifiorgiving.org/popupcircle

Make sure to start and end on time. It's important to be respectful of the time people have taken to participate in your **Pop-up Giving Circle**.

TRAINING MATERIALS



DOWNLOAD RESOURCES

Facilitation Guide for Hosts

Participant Workbook

Organization Guides

- Guide to ROI Initiatives
- The Good People Fund Guide
- Economic Development in Israel
- Slingshot 2014-2015
- Slingshot 2014-2015 - Women and Girls
- Slingshot 2014-2015 - Midwest Edition
- Slingshot 2014-2015 - DC Edition
- Make your own: use Amplifier's Organization Directory



TRAINING FACILITATION

As the host of your **Pop-up Giving Circle**, you'll also be a facilitator, taking the lead explaining the activities and guiding the group through the event. The tips below will help set you up for success.

Prep before the event

Read through the Facilitation Guide for Hosts so you have a good sense of the flow of the event.

Make sure you're familiar with the printed materials (which should be ready to go)

- Participant Workbook – 1 per person

- Facilitation Guide for Hosts – host only
- Guide to ROI Initiatives / Organization Guide(s) – optional

Think about the first few minutes. How will you open and set the tone for your **Pop-up Giving Circle**?

The Union of Reform Judaism and Jewish Teen Funders Network's Philanthropy Project created a list of active listening principles rooted in Jewish values, which can be a nice way to start out the event:

Hochma:

Wisdom – Persistent seeking of knowledge, especially from those whose views differ from our own

Petichat Lebi:

Openness – Receptivity to being transformed by new encounters and ideas

Read more by downloading our [Group Dynamics](#), [Safe Space](#), and [Facilitation](#) resource.

TRAINING FACILITATION

At the event

Ensure everyone is included in the discussion, even if that means “calling on” some people.

Create a safe space for conversation.

- Are there any “ground rules” the group might agree to at the outset?

Timing is key! The conversations you’ll be having are rich, and they’ll go on unless you guide them to a conclusion.

- At the beginning of each part, remind folks how long this part will last
- Know that you’ll have to play time-keeper, and be prepared to (gently) cut people off

Remember that you are the facilitator but also a participant, so sometimes you’ll have to jump back and forth between wearing different “hats”. If you get wrapped up in the fun of participating, always remember to keep time!

TRAINING ORGANIZATION GUIDES

You have several options for which Organization Guide to use during your Pop-up Giving Circle. A number of excellent Amplifier partners have shared their Organization Guides, or you can create your own shortlist by using Amplifier's Organization Directory.

Pre-made Guides

- Guide to ROI Initiatives
- The Good People Fund Guide
- Economic Development in Israel
- Slingshot 2014-2015
- Slingshot 2014-2015 - Women and Girls
- Slingshot 2014-2015 - Midwest Edition
- Slingshot 2014-2015 - DC Edition



Amplifier Directory

- Use the Filter tool or hand select a smaller list of the 200+ organizations currently on Amplifier. You'll need 4 organizations per small breakoutgroup, so pick accordingly.
- Each small group can use the search bar to find and read more about the organizations you've pre-selected.
- (Just remember, these organizations haven't been vetted in any way like the pre-made guides – so use your best judgement!)

TRAINING MONEY

There are a few ways you can gather and distribute money to the chosen organization.



One person can collect everyone's individual contributions and then write a single check to the grant recipient, which would then be tax deductible only for that individual.



Each member of the group can write a check directly to the grant recipient, ensuring that each member's contribution is tax deductible.



If it's important to your group that the grant recipient receive just one check representing the collective contribution, but everyone wants a tax deduction for their contribution, then the contributions can be processed through *Natan*. Each member donates their money to *Natan* and *Natan* issues the circle's grant check to the chosen recipient. *Natan* will not charge any fees for processing donations, but be advised that credit card donations to Natan are charged a 3% fee by the credit card company. (For example: only \$97 of a \$100 contribution will be deposited into Natan's account, so Natan will only be able to give \$97 to the grant recipient.)

We will email you a sample donation letter with Amplifier branding that you can customize and send to the organization with your check. This way the organization knows that the money is being donated because of a Pop-up Giving Circle, and maybe they'll get further involved with Amplifier or your giving circle, if you choose to start one afterwards.

TRAINING

WHETTING YOUR APPETITE

Your **Pop-up Giving Circle** will be a great way to get a taste for the giving circle experience, but it is important to remember that they are quite different.

Throughout the event or briefly at the end, spend time “zooming out” to reflect with the group about the differences between a **Pop-up Giving Circle** and a full-scale **giving circle**.

Example grantmaking reflection questions:

- How does it feel to make decisions based on limited information? How would our conversations be different if we had more information from organizations?
- How does it feel to be speaking in the voice of these organizations and pitching them to each other? How would it be different if we had actual organization representatives speaking for themselves?
- If you're not pooling large amounts of money to give: How different would it feel if we had more money or people involved?
- If you didn't start your **Pop-up Giving Circle** by identifying a focus area: How would our conversation be different if we were focused on a specific issue?

Pop-up Giving Circle

You'll discuss and decide on your group's values in about **30 minutes**

You'll get a brief introduction to some excellent organizations and **make decisions about them quickly**, based on their missions alone

Those in the room will **"represent" the applicant organizations**, pitching them to each other for funding

The funds you're giving away **may be nominal**, and may be supplied by someone else

Your giving circle will **complete an entire grant cycle** today, and then maybe "close"

The grant process can **take weeks**, including written applications, due diligence, site visits, and interviews of potential grantees

You might ask organizations to **represent themselves** in interviews or site visits with your circle

Members typically contribute **meaningful amounts of their own money** to create the grantmaking pool

May take several meetings to go through a grant cycle, may stay together for several cycles (or indefinitely), and may decide to form ongoing relationships with your grantees

The circle could discuss for a **full meeting**

Full-scale Giving Circle

TRAINING REPORT BACK

Shortly after your **Pop-up Giving Circle**, please fill out our brief survey at the bottom of amplifiergiving.org/popupcircle

This will populate a brief profile about your experience on our **Pop-up Giving Circle** page. You can see all of the other Pop-up events that went on, and inspire others to host one in the future.

Completing this survey will also make you eligible for reimbursement for any event-related costs up to \$100.*

We can only reimburse expenses for which you provide receipts.

**Only applicable in certain situations*



MOVING FORWARD STARTING YOUR OWN GIVING CIRCLE

We wish you all the best with your **Pop-up Giving Circle**. Following these tips and using our guides will help make it a success! Of course if you have any other questions in advance, please send us an email so we can help.

After your **Pop-up Giving Circle** event, we'd love to support you in starting your own giving circle if you or other participants enjoyed the experience. Reach out to us and we'd be happy to support you in getting your full-scale giving circle off the ground.

Thank you for your participation!

Hello@AmplifierGiving.org www.AmplifierGiving.org @AmplifierGiving

