



SMART GIVING CIRCLES

Dear Friend,

We have something exciting to share with you: we've decided to start some Smart Giving Circles, and we want you to be a part of one.

A Smart Giving Circle is an innovative way for us to gather a group of professionals, and to be thoughtful in how we give our money away.

Our Smart Giving Circles will reflect the combined interests of all members. We will decide for ourselves what types of charitable issues are most important to us, what we want to learn more about, and what we want our charitable dollars to support. Through the process, we will connect with some terrific nonprofit organizations.

Our Smart Giving Circle will also be a community. We are going to learn about each other's values and interests, and together have a greater impact than any of us could on our own.

The way it works is this:

1. Each member will contribute a modest amount as a tax-deductible charitable contribution to a Smart Giving Circle Pool at the Community Foundation (between \$250-\$2,500).
2. We'll discuss the values that inspire our giving and the issue areas we want to support.
3. Then we'll decide together which charitable organizations we want to support.

We've determined we can accomplish this in 5 meetings, with a bit of on-line chat and reading in between. And we'll make sure to have fun while we're doing it!

Our Smart Giving Circles will be part of an initiative by the Chester County Community Foundation, The PLAN: Philanthropy Learning Action Network. Through this, we'll have access to all of the resources we need to start up and operate our group: meeting facilitation, nonprofit sector expertise, grantmaking experience, and connections to other Smart Giving Circles.

We sincerely hope you will join our Smart Giving Circles. We are recruiting now, for a series of 5 monthly 2-hour meetings that would take place in West Chester, starting in September 2016. To fill out the Interest Survey, go to <https://www.surveymonkey.com/r/Q5LTV59>

Please let us know if you have any questions, and if you can think of anyone else who might want to be part of this great experiment. For more details, visit www.chescocf.org or phone Steph Stevens at (610) 696-8211.

Patrick South, CFP, Chair

PJ Gallo Esq.

Rachel Lusk Esq.

Michelle Sanchez

Karen Sarnacki

The PLAN Steering Committee

JOIN THE PLAN

PHILANTHROPY LEARNING-ACTION-NETWORK

Make a difference today that will last forever



Chester County
COMMUNITY FOUNDATION

28 W. Market Street—The Lincoln Building
West Chester, PA 19382
(610) 696-8211 info@chescof.org



www.chescof.org



THE PLAN: WHY?

- ✓ Leverage talents & resources of aspiring & emerging philanthropists from all walks of life
- ✓ Connect with like-minded peers & mentors
- ✓ Make personal & collective community impacts, to make an imprint in our community
- ✓ Meaningful experiences to engage in well-informed, smart, sustainable short-term & long-term philanthropy
- ✓ Create caring, generous communities of people who think deeply and act intentionally, thoughtfully, and strategically – together

THE PLAN: MODEL

Site Visits & Tours

The PLAN Grant Award Ceremony

Adopt a Nonprofit & Champion a Cause

Volunteer Opportunities

Happy Hours

The PLAN Signature Fundraising Event



Imprints Founding Giving Circle/DAF



Giving Circle B



Giving Circle C

Steering Committee

Tip toe

Dive in

**BASIC
MEMBER:
\$100/yr**

**SMART
GIVING
CIRCLE
MEMBER:
\$250 -
\$2,500/yr**

*You choose
what fits you*



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THE PLAN: HOW?

PHILANTHROPY Learning-Action-Network	Time & Money		
	Free	PLAN MEMBER Tip Toe* \$100	PLAN GIVING CIRCLE Dive In** (\$250-\$2,500)
Smart Giving Circles			▲
Site Visits		▲	▲
Grantmaking			▲
Grant Awards Celebration		▲	▲
Adopt a Nonprofit to Champion		▲	▲
Charity Chats/Philanthropy Forums		▲	▲
The PLAN Signature Event Invitation		▲	▲
Volunteer Opportunities	▲	▲	▲
Happy Hours: Meet & Greet	▲	▲	▲

THE PLAN: ME? How Can I Make a Difference?

Join The PLAN to intentionally and proactively make an impact on the community where you live, work and enjoy.

* **TIP TOE** into The PLAN with a \$100 annual membership gift. In return, you'll be invited to exclusive PLAN & Community Foundation events.

** **DIVE IN** when you're ready to commit to more intensive exploration of community issues and charities.

Join a Smart Giving Circle and donate some of your time and money to make a thoughtful, strategic difference.

Make a greater impact by donating \$250-\$2,500. You choose what fits your personal needs and giving capacity.





SMART GIVING CIRCLES: BENEFITS

- Giving circles are a powerful way for small groups to make big change: to give together proactively & strategically, to build community with each other, and to connect to excellent potential grant recipients who are changing the world in a variety of ways.
- Recent research¹ has shown that Giving Circle members give more money, give more strategically, and engage more deeply in their community than non-giving circle members.
- They are also more likely to tell other people about the organizations their giving circle supports (rather than their own personal charitable donations) – thereby creating ripple effects that go far beyond the circle itself. Giving Circles are:

ACCESSIBLE
Anyone at any giving level, at any age, in any place, with any funding interest, can start a giving circle. There's no minimum contribution level, and no barriers to entry.

COLLABORATIVE
Members make decisions together in a democratic process, as equals and peers.

EMPOWERING
Members leverage their dollars to do something bigger - and perhaps better - than they could on their own.

EDUCATIONAL
Members learn about the needs of their community or focus area, and can be intentional and proactive about how they give to the causes they care about.

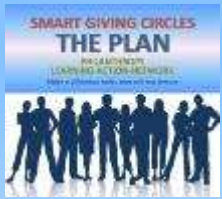
HANDS-ON
In addition to active engagement with philanthropic decision-making, some giving circles also offer members a chance to volunteer with or provide *pro bono* professional assistance to grantees.

COMMUNAL
Members connect with each other and with their communities, building meaningful relationships with each other and with those they are supporting.

FUN!
Giving circles bring people together to accomplish some serious good in a joyful way. It's a social experience: In addition to giving together, members often share food, share stories, and share their lives together in meaningful ways.

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1: Angela Eikenberry and Jessica Bearman, "The Impact of Giving Together: Giving Circles' Influence on Members' Philanthropic and Civic Behaviors, Knowledge and Attitudes," Forum of Regional Associations of Grantmakers, 2009. Available online at: http://www.philanthropy.iupui.edu/files/research/2009givingcircles_fullreport.pdf

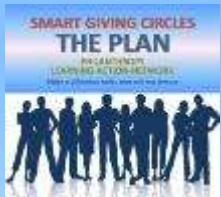


SMART GIVING CIRCLES

WIN-WIN-WIN

Giving Circles are a growing form of philanthropy. Giving Circles:

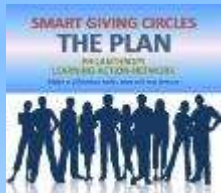
- Increase members' knowledge about philanthropy, nonprofits and the community
- Influence members to give more strategically
- Increase members' engagement in civic activities outside of the Giving Circle
- Amplify your charitable giving and your connections in the community
- Are INTERESTING & **FUN**



SMART GIVING CIRCLES: GOALS

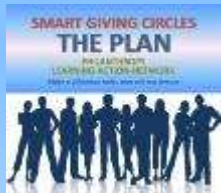
Smart Giving Circles are central to The PLAN's Core
“Dive In” program strategy

- A Giving Circle is a group of people who pool their charitable donations and decide together where to allocate their money
- Develop ongoing philanthropy relationships in intimate groups of 6-10 people
- Explore & more deeply understand nonprofit issues
- Discern how to make well-informed, smart gifts and grants to nonprofits
- Develop networks, friendships & strategic philanthropy skills that will last a lifetime



SMART GIVING CIRCLES: MEMBERS & COMPOSITION

- Each Smart Giving Circle has 6-10 members to promote networking in an intimate group
- Prospective members fill out pre-screening application on line at <https://www.surveymonkey.com/r/Q5LTV59> to help clarify which Giving Circle will best meet their schedule & aims
- A Community Foundation facilitator guides the group discussions and attends to meeting logistics, to ease administration burdens and promote effective discussions
- Giving Circles are geographically-based so people can meet close to home or work
 - West Chester-focused, Fall 2016
 - Mix of professions, to promote networking & boundary spanning
 - Ideal age of members is between 25-49
 - Giving Circles meet in conference rooms and private rooms in restaurants. During breakfast, lunch or early evening. The members can modify meeting spaces/times as mutually agreed upon.
- Five (5) Giving Circle meetings held within ½ year to make Smart Grant decisions



SMART GIVING CIRCLES: MEMBERSHIP TIME & \$ REQUIREMENTS

Smart Giving Circle members
Sign on for 1 series at a time

- Join The PLAN as an annual dues-paying member @\$100
- Fill out Smart Giving Circle Interest Survey:
<https://www.surveymonkey.com/r/Q5LTV59>
- Participate in a Smart Giving Circle for a minimum of 5 (five) 2-hour meetings during ½ year + brief on-line reading
- Donate to your Smart Giving Circle Grant Pool managed by the Community Foundation
\$250 - \$2,500, as you desire
- Attend other Community Foundation/PLAN events as your schedule allows

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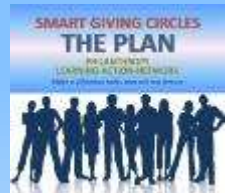
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SMART GIVING CIRCLES:

FACILITATION GUIDE

**WILL BE SENT TO
GIVING CIRCLE MEMBERS
2 WEEKS PRIOR TO FIRST MEETING**





SMART GIVING CIRCLES: 2016 FALL DATES



		Timing	8:15-9:30 a.m. West Chester	5:15-7:00 p.m. West Chester
MTG #1	Intros, Why Give?	Late September	Tues 9/xx/16	Wed 9/xx/16
MTG #2	NPO Sector	October	Tues 10/xx/16	Wed 10/xx/16
MTG #3	Due Diligence	Early November	Tues 11/x/16	Wed 11/x/16
MTG #4	Site Visits	Mid November	Tues 11/x/16	Wed 11/x/16
MTG #5	Decide Award	Early December	Tues 12/x/16	Wed 12/x/16
PLAN Event	Grants Celebration	Mid January	Tues eve 1/x/17	Tues eve 1/x/17

What's after the last Giving Circle gathering?

- The PLAN **Adopts Giving Circle Nonprofit Grantees** to Champion their cause for the next year.
- You join another Giving Circle if desired, re-up this one, attend PLAN events, or take a break.

Interested in Joining a Giving Circle?

1. Fill out Smart Giving Circle Interest Survey @ <https://www.surveymonkey.com/r/Q5LTV59>
2. Contact steph@chescocf.org or karen@chescocf.org (610) 696-8211
3. Pay \$100 PLAN Annual membership donation
<http://chescocf.org/explore/family-individual-philanthropy/the-plan/>