

JOIN
THE PLAN
PHILANTHROPY
LEARNING-ACTION-NETWORK
GIVING CIRCLES

make a difference today that will last forever



Chester County
COMMUNITY FOUNDATION **growing philanthrop**
for good. forever.

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cardconnect.

Jeff Shanahan, President/CEO
Pat Shanahan, COO
Angelo Grecco, EVP Sales
Jennifer Ireland, HR

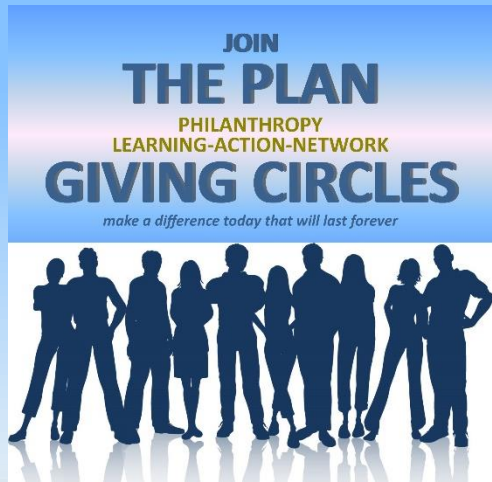
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5/13/16

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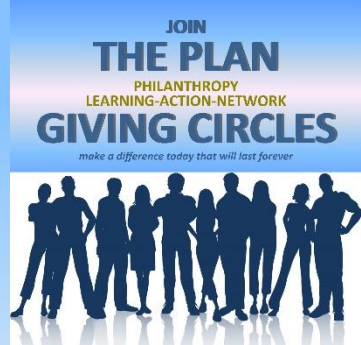
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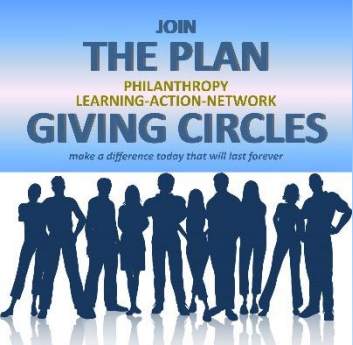
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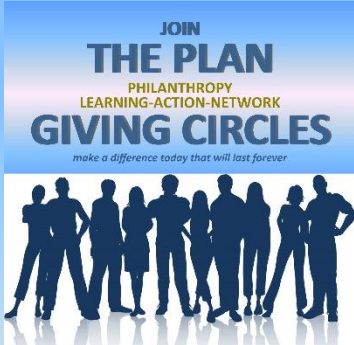
WHY?

- ✓ Team-building around a common philanthropic interest
- ✓ Share employee knowledge & skills with nonprofit community
- ✓ Develop & implement CardConnect philanthropic strategy which includes gifts of time, talent & treasure
 - ✓ The non-profit sector yearns for business talent, energy, strategy & resources (*time, talent, treasure*)
 - ✓ Community-minded individuals in the for-profit sector seek personal & collective community impact (*make a difference, give where you live, think locally/act globally*)
- ✓ **The PLAN:** Meaningful experiences to engage in well-informed, smart, sustainable short-term & long-term social investment
- ✓ **The Aim:** Caring, generous communities of people who think deeply and act intentionally, thoughtfully, and strategically – together

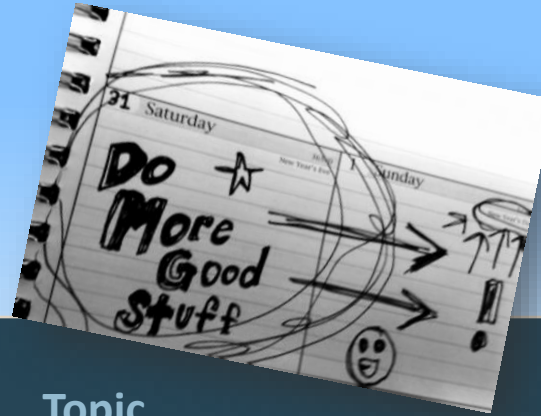


WHAT? HOW?

- 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 @6-12 people
- Explore & more deeply understand nonprofit issues
- Discern how to make well-informed, smart gifts and grants to nonprofits
- Develop networks, friendships & strategic corporate social investment skills that will last a lifetime



WHEN?



1.5 hr mtgs @CardConnect	Topic	Timing 1:00 Group 3:00 Group 4:30 Group
	Kickoff in CardConnect lobby	June 7 at 1 pm
MTG #1	PLENARY: Why Give, NPO Sector Overview, Due Diligence BREAKOUTS: Discuss Causes of Interest to Giving Circle	Month #1 <i>June 23 or July 6 or 7</i>
-between mtgs-	Review Top Charities websites, Guidestar reports & IRS 990s	-between mtgs-
MTG #2	PLENARY: Discerning Strengths & Needs, Site Visit Checklist BREAKOUTS: Discuss, Prioritize & Choose Top Charities for Site Visits	Month #2 July 21 (<i>backup July 27</i>)
MTG #3	Charity Site Visits	Month #2 <i>Aug 2, 3 or 4</i>
MTG #4	PLENARY: Discern, Prioritize & Select BREAKOUTS: Debrief on Site Visits. Decide Grant Awards. Award Grants. Determine any next steps.	Month #3 <i>August 16, 17 or 18</i>

What's after the last Giving Circle gathering?

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



RESOURCE NEEDS

cardconnect.

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Meeting Rooms, Food & Drink
 (1 plenary space & 2-5 breakout spaces)
 for Noontime group, 2:30 group, 4:30 group

1-2 Plenary trainers
 2-5 Breakout group facilitators

CardConnect will support group meetings
 outside the office as well

Training/facilitation materials

Match employee contribution to Giving Circles:
 \$100/employee to join as Giving Circle member
 Up to \$2,500/employee for Grantmaking Fund

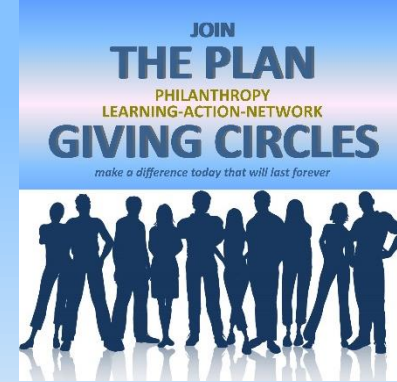
Provide research on nonprofits in zip code
 areas of interest to CardConnect employees

CARDCONNECT GIVING CIRCLE MEMBER

- Join The PLAN Giving Circle as a dues-paying member @\$100/person/Giving Circle
CardConnect will pay 50% of each employee's membership: \$50/\$50
- Participate in a Giving Circle for four 1.5 hr meetings over a couple/few months
 + brief on-line reading
- Think about how much of your own money you are willing to donate to your
 Giving Circle Grant Pool at the Community Foundation
 \$250 - \$2,500, as each individual member desires
CardConnect will match each employee's donation 100%

NEXT STEPS: DATES

To: Jeff Shanahan, President/CEO, CardConnect
Pat Shanahan, COO
Angelo Grecco, EVP Sales
Jennifer Ireland, HR



We are excited to help CardConnect expand its corporate social investment in the community via our Giving Circles.

Giving Circles are an innovative way to make a positive difference in the local nonprofit community, while building problem solving skills and teamwork.

The Community Foundation will provide Giving Circle meeting facilitators, nonprofit sector expertise, charitable due diligence training, grantmaking experience, and connections to other Giving Circles.

From CardConnect, we seek eager professionals + space + time. We are delighted that CardConnect is willing to equally match employee contributions to the Giving Circle membership (\$100/person = \$50 each) and match 100% of grant donations (\$250-\$2,500/person).

Ready? On page 5, we have listed possible dates and times. We confirmed our Tues., June 7, 2016 1 p.m. kickoff. Now let's firm up the 4 summer Giving Circle meeting dates at CardConnect. Let the Giving Circles begin!

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Draft webpage at
<https://chescofcf.org/explore/family-individual-philanthropy/the-plan/giving-circles-cardconnect/>