

# SMART GIVING CIRCLES THE PLAN

PHILANTHROPY  
LEARNING-ACTION-NETWORK

*Make a difference today that will last forever*



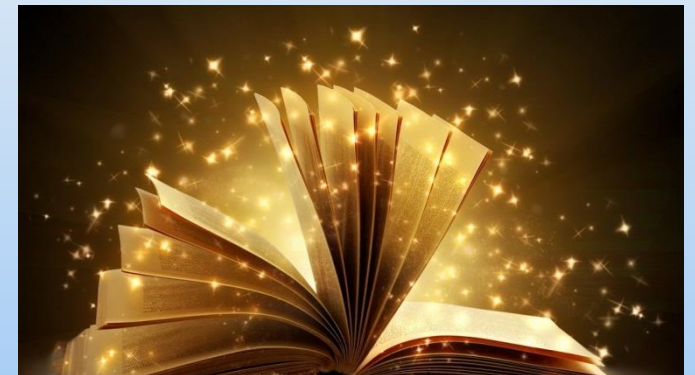
*Chester County*  
COMMUNITY FOUNDATION

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



# SMART GIVING CIRCLES:

## FACILITATOR & GROUP MEMBER GUIDE





# The PLAN

## Philanthropy Learning-Action-Network

*Make a difference today that will last forever*

**BASIC MEMBER:**

**\$100/yr**

**waived for Friends of Eliza**

**SMART GIVING  
CIRCLE MEMBER:  
CONTRIBUTION TO  
GRANT POOL:  
\$250 -\$2,500**

***Choose what  
fits you***

### 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

### THE PLAN: HOW?

PHILANTHROPY Learning-Action-Network	Time & Money
	PLAN GIVING CIRCLE (\$250-\$2,500)
Smart Giving Circles	▲
Site Visits	▲
Grantmaking	▲
Adopt a Nonprofit to Champion	▲
Charity Chats/Philanthropy Forums	▲
Volunteer Opportunities	▲
Happy Hours: Meet & Greet	▲



# SMART GIVING CIRCLES: MEMBERS & COMPOSITION

- ☐ Each Smart Giving Circle has 6-12 members to promote networking in an intimate group
- ☐ 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
  - ☐ Mix of professions, to promote networking & boundary spanning
  - ☐ Ideal age of members is between 25-49
  - ☐ Giving Circles meet in living rooms, conference rooms and private rooms in country clubs. During breakfast, lunch or early evening. The members can modify meeting spaces/times as mutually agreed upon.
- ☐ 4-5 Giving Circle meetings held within ½ year to make Smart Giving decisions



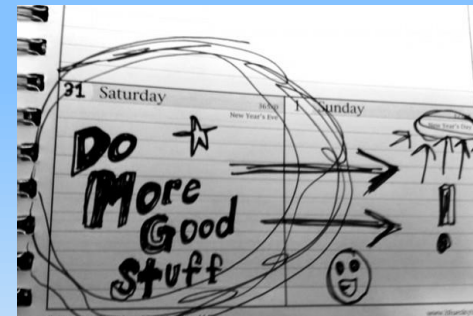
# SMART GIVING CIRCLES: MEMBERSHIP TIME & \$ REQUIREMENTS

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

- ☐ ~~Join The PLAN as an annual dues-paying member @ \$100~~
- ☐ Participate in a Smart Giving Circle for 4-5  
1.5-hour meetings during ½ year + brief on-line reading
- ☐ Confidentially 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



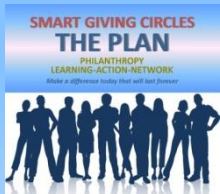
# SMART GIVING CIRCLES: 2017 SPRING DATES



		Timing	Evenings at Eliza's 7-8:30 pm West Chester
MTG #1	Motivators, NPO Sector	January	Tues 1/24/17
MTG #2	Due Diligence	February	Tues 2/21/17
MTG #3	Site Visits	March	Mon 3/13/17
MTG #4	Decide Top Choices Desired Grant Awards & Volunteer Activities	April	Mon 4/10/17
MTG #5	Decide Next Steps: Volunteering Individually w/Giving Circle w/Neighborhood	May	Mon 5/8/17

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.

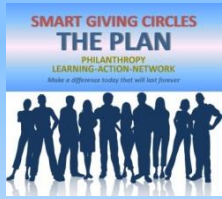


# Smart Giving Circles

## Meeting #1

### Mtg #1: Intro to Group Members & Giving Motivation/History

- ✓ Who are you?
- ✓ Why do you give & volunteer? What influenced you to start? To what degree have your parents or other family members been involved as community volunteers and donors?
- ✓ What do you care about, and why? If you could make the world better in small steps, what would you do first? How do you choose?
- ✓ What nonprofit topics &/or nonprofit organizations do you want to know more about? Why?



# Smart Giving Circles Meeting #1

## Meeting #1: Overview of NPO Sector, nationally and locally

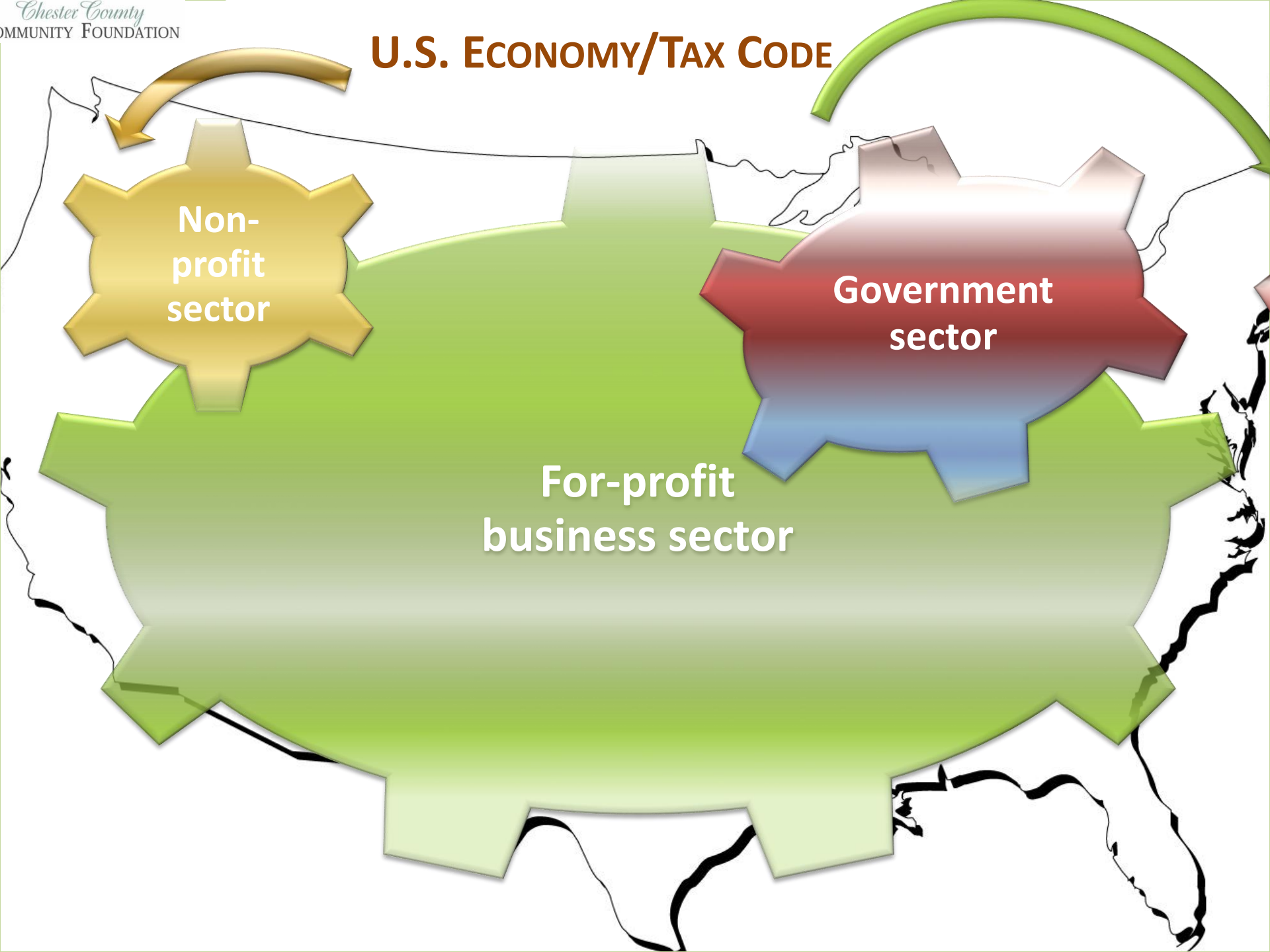
- ✓ What's a nonprofit? How many exist? What are the various types? (FOI, org phase/size)
- ✓ What are biggest similarities/differences between nonprofits & for-profits & governmental orgs?
- ✓ What are the biggest issues facing the nonprofit sector?
- ✓ What types of nonprofits most interest us as a group?
- ✓ How can we tell if a nonprofit does good work?
  - due diligence areas: Mgt/Admin (personnel) - Fundraising (resources) - Programs/Services
  - due diligence methods:
    - website review, formal site visit, informal site visits, proposal review, IRS 990 & audit review
  - review & discuss Key Funding Discernment Questions, to help with funding decisions







## U.S. ECONOMY/TAX CODE



**Non-  
profit  
sector**

**Government  
sector**

**For-profit  
business sector**

# NONPROFITS & CHARITIES

## Private Foundations

Independent/  
Family  
Foundations

Company-Sponsored/  
Corporate  
Foundations

Operating  
Foundations

Public  
Foundations

**Community  
Foundations**

*Chester County*  
COMMUNITY FOUNDATION

United Ways

Health  
Conversion  
Funding  
Foundations

## Nonprofit Direct Service Organizations

Arts  
Culture

Education

Environment

Social Service  
Human Welfare  
Health

Scientific  
Religious  
Literary  
Public Safety

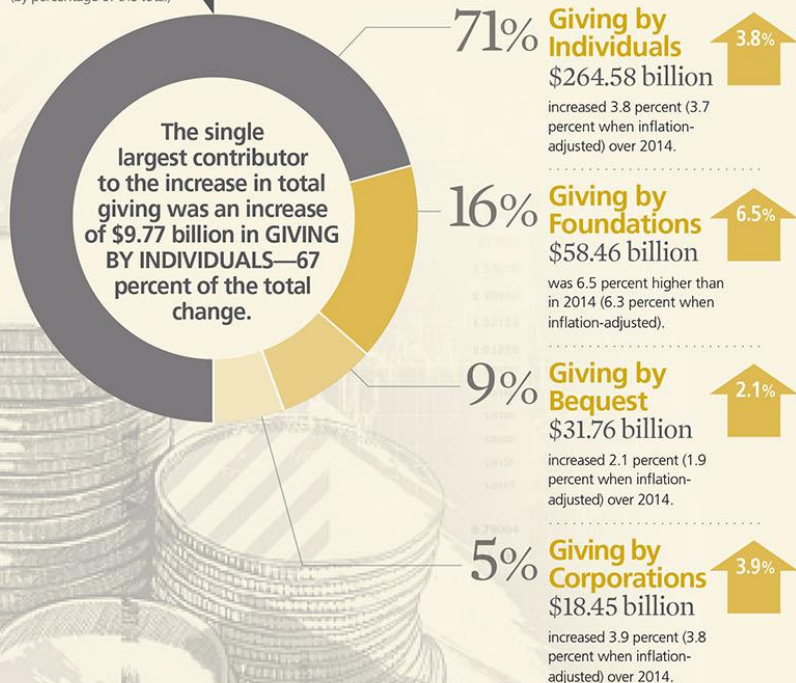
Commercial  
Donor Advised Funds

2015 was America's most-generous year ever!

# \$373.25 billion

## Where did the generosity come from?\*

Contributions  
by source  
(by percentage of the total)



Visit [www.GivingUSA.org](http://www.GivingUSA.org) to learn more and to order your copy of *Giving USA 2016: The Annual Report on Philanthropy for the Year 2015*.

\* All figures on this infographic are reported in current dollars unless otherwise noted.



Giving to **international affairs** increased 17.5 percent in 2015 after two consecutive years of decline. That large increase may be attributable to growth in the number of active international charitable organizations; use of more strategic fundraising methods; and increased focus on international issues among foundations.



While the percentage of total charitable contributions given to **religion** has steadily shrunk for decades, from 2014 to 2015, this subsector **held firm at 32%** of total giving.

## Where are all of the charitable dollars going?

(as a percentage of the total)



The growth rate in giving to **educational organizations** exceeded 5 percent in 2015, a trend also seen in four of the five years between 2010 and 2014.



Giving USA Foundation™, The Giving Institute, and the Indiana University Lilly Family School of Philanthropy are pleased to continue their partnership in providing the most comprehensive, longest-running, and most rigorously researched resource on U.S. charitable giving, *Giving USA: The Annual Report on Philanthropy*. It is a privilege to report on Americans' generosity and related historical trends on U.S. charitable giving.



**Giving USA™**  
Shared intelligence.  
For the greater good.



**THE Giving Institute™**  
Shared intelligence.  
For the greater good.



**IUPUI**  
LILLY FAMILY SCHOOL OF PHILANTHROPY

# STATE OF THE SECTOR SURVEY

[NFF Survey Analyzer](#): Explore the data!



The nonprofit sector generates stories of both promising innovation and overwhelming challenges.

NFF's 2015 State of the Nonprofit Sector Survey focuses on the underlying causes of these dynamics by exploring the programmatic, financial, and operational issues facing nonprofits across the U.S. We launched the Survey in 2008, when economic crisis threatened the viability of many organizations. Seven years later, results from 5,451 respondents show some indications of recovery, stabilization, and growth. Nonprofits are adding jobs, engaging in strategic conversations such as leadership succession planning, and looking to retain their workforce. Yet as they raise their sights from the focus on short-term crisis, many are confronting the troubling reality that current practices cannot sustain organizations in the long-term or meet the needs of the communities they serve now. Many organizations have stumbled out of crisis looking to make the necessary investments to secure their long-term future. And it is a hard road ahead.

## KEY FINDINGS

**Under-resourced communities are going without because nonprofits can't meet demand.** Americans—particularly those in low-income communities—are still struggling to secure jobs, affordable housing, and healthcare.

- 76% of nonprofits reported an increase in demand for services—the 7th year that a majority have reported increases.
- 52% couldn't meet demand—the third year in a row that more than half of nonprofits couldn't meet demand.
- Of those who reported that they could not meet demand, **71% said that client needs go unmet when they can't provide services.**

**Nonprofits identified critical needs in their communities, including:**

- 35% affordable housing
- 26% youth development (such as after-school and mentoring programs)
- 23% job availability; 16% job training
- 21% access to healthcare
- 19% access to strong, well-performing schools

**Recovery of the U.S. economy hasn't addressed the systemic and perpetual funding challenges facing nonprofits.** While we are seeing some positive economic indicators, in many cases nonprofits are still hampered by insufficient funding and a lack of investment in long-term sustainability.

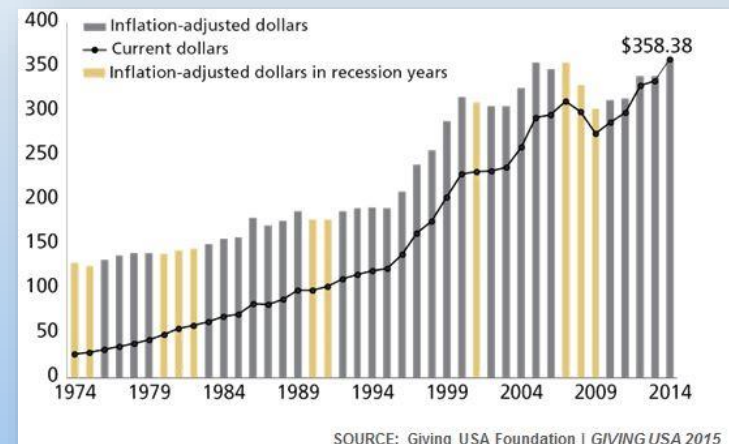
- For some nonprofits, financial health indicators have improved: 47% ended 2014 with a surplus, the highest in the history of our survey.
- However, 53% are reporting 3 months or less of cash-on-hand.
- Nonprofits said that top challenges were:
  - Achieving long-term sustainability (32%)
  - The ability to offer competitive pay and/or retain staff (25%)
  - Raising funding that covers full costs (19%)

**Nonprofits are navigating a time of immense need and change, while pursuing ways to build long-term sustainability and viability.**

Nonprofits continue to prove their ability to survive and thrive in tough conditions.

They are working to ensure their ability to meet community needs now and in the years to come:

- 51% collaborated with another organization to improve or increase services offered.
- 44% hired staff for new positions.
- 33% upgraded hardware or software to improve service or program delivery.
- 29% conducted long-term strategic or financial planning.





## GRANT PROPOSALS SUBMITTED TO THE CHESTER COUNTY COMMUNITY FOUNDATION

When nonprofits submit proposals to the Community Foundation, we post them on our website so that YOU, our fund advisors, can easily review them in these areas: Capacity Building | General Operating | Capital & Endowment | Environmental Proposals To see a complete list and review proposals of interest to you, visit: [www.chescocf.org](http://www.chescocf.org) or this direct link: <http://chescocf.org/receive/find-active-grants/>

### CAPACITY BUILDING PROPOSALS

Adult Care of Chester County  
Alianzas de Phoenixville  
Art Partners Studio  
Arts Holding Hands and Hearts  
Association for the Colonial Theatre  
Ballet 180  
Boulevard Special Camp  
Brandywine Red Clay Alliance  
Canine Partners for Life  
Charles A. Melton Arts & Education Center  
ChesPenn Health Services  
Chester County Futures  
Chester County Hospital Foundation  
Chester County Long Term Recovery Committee  
Chester County Pop Orchestra  
Chester County SPCA  
Children's Literacy Initiative  
Clinic, The  
Coatesville Center for Community Health  
Coatesville Area Public Library  
Coatesville Area Senior Center  
Coatesville Youth Initiative  
Crime Victims' Center of Chester County Inc., The  
Daemion Counseling Center  
Decade to Doorways  
Downingtown Area Senior Center  
Downingtown Area Communities That Care  
Downingtown Community Education Foundation  
Dragonfly Forest  
Easttown Library Foundation  
Friends Association for Care & Protection of Children  
Friends of Valley Forge Park  
Garage Community & youth Center  
Health Care Access  
Human Services  
Interfaith Housing Assistance  
Junior Achievement of Southeastern Pennsylvania  
Keenest Area Park Authority- Anson B. Nixon Park  
Lundale Farms  
Maternal & Child Health Consortium of Chester County  
Operation Warm  
Orion Communities  
People's Light & Theatre  
Phoenixville Area Senior Center

Phoenixville Public Library  
The Land Conservancy of So ChesCo  
Trisketes Inc.  
United Way of Chester County  
Volunteer English Program in Chester County  
Westtown School  
YMIC Foundation  
Young Moms

### GENERAL OPERATING PROPOSALS

Act in Faith  
Alianzas de Phoenixville  
ALS Association Greater Phila Chapter  
ALS Hope Foundation  
American Cancer Society  
American Helicopter Museum  
Arts Holding Hands and Hearts Inc., (AHHAH)  
Baker Industries  
Barclay Friends  
Barnstone Art for Kids  
Bethesda Project  
Bishop Shanahan High School  
Brandywine Red Clay Alliance  
Brandywine Singers, The  
Bridge of Hope Lancaster & Chester Counties  
Boy Scouts of America  
Cabrini College  
Camp Dreamcatcher  
Campbell Village Kimberston Hills  
Center for Blind and Visually Impaired  
Chester County Futures  
Chester County Hospital  
Chester Springs Library  
ChesPenn Health Services – Dental  
ChesPenn Health Services – Medical  
Church Farm School  
Clarke Pennsylvania, Inc.  
Clinic, The  
Coatesville Area Public Library  
Coatesville Youth Initiative  
Community Volunteers in Medicine  
Community, Youth and Women's Alliance Inc.  
Court Appointed Special Advocates  
Covenant House of PA  
Daemion Counseling Center

Questions? Contact  
Beth Harper Briglia, CAP  
Vice President, Grantmaking &  
Donor Services  
(610) 696-8211 beth@chescocf.org



David's Drive 831 Inc.  
Daylesford Abbey  
Delaware County SPCA  
Devereux Foundation  
Domestic Violence Center of ChesCo  
Downingtown Area Communities That Care  
Downingtown Area Historical Society  
Downingtown Area Senior Center  
Downingtown Library  
Dragonfly Forest  
Easttown Library Foundation  
Easter PA Conference United  
Fame Fire Company  
Family Lives on Foundation  
Family Promise of Southern ChesCo  
Fellowship health Resource  
Friends Association for Care and Protection of Children  
Friends Home in Kennett  
Garage Community & Youth Center- Kennett Square  
Garage Community & Youth Center- West Grove  
Gateway Housing Group  
Girl Scouts of E. PA  
Good Neighbors, Inc.  
Good Samaritan Shelter  
Good Works, Inc.  
Gravestone Society, The  
Habitat for Humanity of ChesCo  
Home of the Sparrow  
Hope Beyond Borders/ Coatesville Kids to College  
Hope Springs Equestrian Therapy  
Housing Authority of the County of Chester  
IHM Sisters Camilla Hall  
Jonathan Beech Memorial Concert, Inc.  
Kelly Anne Dolan Memorial Fund  
Keenest Center  
Kennett After School Association- After the Bell  
Kennett Area Community Service  
Kennett Area Senior Center  
Kennett Education Foundation  
La Comunidad Hispana  
Linda Creed Breast Cancer  
Lincoln University, The  
Lord's Pantry of Downingtown  
Lundale Farm  
Main Line Animal Rescue  
Main Line Deputy Dog  
Maranatha Christian Academy  
Maternal and Child Health Consortium  
Meals on Wheels Chester County  
Melmark  
Mill at Roselma  
Minding Your Mind  
Mom's House  
Moyer Foundation, The  
National Kidney Foundation

Nurse Association of Pottstown & Vicinity  
Opportunities Industrialization Center (OIC)  
Orion Communities  
Oxford Arts Alliance  
Oxford Area Neighborhood Services Center  
Oxford Educational Foundation  
PACT for animals  
Parkesburg Point Youth Center  
PA Friends of Agriculture Foundation  
PA Parks and Forests Foundation  
Partnership for the Delaware Estuary  
Peacemaker Center, The  
Phoenixville Area Children's Learning Center  
Phoenixville Area Community Services  
Phoenixville Communities that Care  
Phoenixville Area Police Athletic League  
Phoenixville Area Senior Center  
Pottstown Cluster of Religious Communities  
QUEST Therapeutic Services  
Safe Harbor Chester County  
Sacred Heart School  
Southeastern Pennsylvania Autism Resource Ctr.  
Surrey Services for Seniors  
Team Children  
The Land Conservancy of Southern Chester County  
Tick Tock Early Learning Center  
Timothy School  
United Way Stability Center  
Valley Youth House Committee, Inc.  
West Chester Public Library  
Westtown School  
Wharton Escherick Museum  
Willistown Conservation Trust  
Women's Resource Center  
YMCA of Greater Brandywine  
YoungMoms

### CAPITAL & ENDOWMENT PROPOSALS

Bishop Shanahan High School  
Church Farm School  
GPA Mobilization Ministries  
Uptown! Entertainment Alliance

### ENVIRONMENTAL PROPOSALS

Avon Grove Charter School  
French and Pickering Creeks Conservation Trust  
Great Valley Nature Center  
Green Valleys Watershed Association  
Historic Sugartown  
Jenkins Arboretum & Gardens  
The Land Conservancy of Southern Chester County  
Willistown Conservation Trust  
Willistown's Okebocking Nature Center

<https://chescocf.org/receive/find-active-grants/>

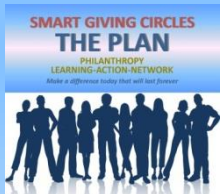


## DUE DILIGENCE AREAS

### **Level 1: Basic Compliance 501 ( c ) ( 3 )**

### **Level 2: Performance**

- Organizational history & track record
- Constituents served
- Governance & executive leadership
- Organizational vision & strategy
- Plans, initiatives, outcomes, evaluation
- Human resources: staff & volunteer
- External communications
- Relationships, partnerships & networks
- Financial health



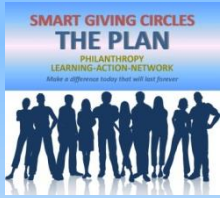
# Smart Giving Circles Meeting #1



## Mtg #1: Summary/Next Steps

- ✓ What nonprofit topics &/or nonprofit organizations do you & this Giving Circle want to know more about? Why?





# Smart Giving Circles

## Meeting #2

**Online:** Encourage website review, proposal review, IRS990/audit review, informal site visit/drop in before next meeting.

**Affirm:** Nonprofit field of interest/Top 2 or 3 nonprofits of most interest to the group

### **Mtg #2: Due Diligence Discussion**

- ✓ Meeting review: Discuss 3 nonprofits “Due Diligence Areas” based on website review, proposal review, 990/audit, informal site visit. Narrow to Top 2 for site visits.
- ✓ Outline key issues to be discerned on site visits and in 1:1 conversations
- ✓ Agree on site visit schedule for top 2 nonprofits



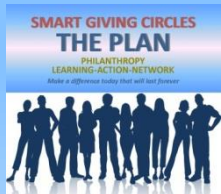
## **Meeting #3: SITE VISITS**

### **AIMS**

- ✓ **Develop relationship**
- ✓ **Understand day to day joys and sorrows**
- ✓ **Feel/see areas not captured in reading/online**

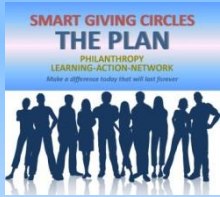
### **DISCERN: Performance, Challenges, Hopes & Dreams**

- **Organizational history & track record**
- **Constituents served**
- **Governance & executive leadership**
- **Organizational vision & strategy**
- **Plans, initiatives, outcomes, evaluation**
- **Human resources: staff & volunteer**
- **External communications**
- **Relationships, partnerships & networks**
- **Financial health**



# Smart Giving Circles: Grant Decision Criteria

Criteria	Yes	Maybe	No
<b>Important community need</b>	NPO is using substantiated, effective methods to solve a clear and compelling unmet need	NPO has identified a compelling need; methods/services may be somewhat ineffective	NPO is duplicative of other NPOS and is not meeting unique need &/or Methods/services are ineffective
<b>Reaching &amp; serving constituents well</b>	NPO has capacity to reach and serve constituents well, with a proven track record of high quality services	NPO has the potential, but is in need of certain qualifications	NPO does not exhibit sufficient evidence of outreach nor service
<b>Strong leadership: staff &amp; board</b>			
<b>Org vision, innovation &amp; nimbleness</b>			
<b>Appropriate partnerships &amp; alliances</b>			
<b>Fiscal health/need</b>			
<b>AWARD GRANT?</b>			



# Smart Giving Circles

## Meeting #4/5

**Online:** E-mail site visit notes/observations to Group

### Mtg #4: Debrief & Decide

- ✓ Debrief on site visits
- ✓ Prioritize giving & volunteering opportunities
- ✓ Decide grant allocation: % to NP A, % to NP B
- ✓ Decide who/how to notify grantee(s) of grant award(s)
  
- ✓ Direct CCCF Business Affairs to process Smart Giving Circle Fund grant award check(s)
- ✓ Direct CCCF Marketing to publicize in newspapers, website, LinkedIn & Facebook
  
- ✓ Decide next steps with NP A, NP B  
    champion its cause; encourage others to attend FR events & volunteer, etc.

### **What's next?**

- ❖ CCCF events
- ❖ Future Giving Circle Meetings. Break / Re-Join / Re-Up New Giving Circle



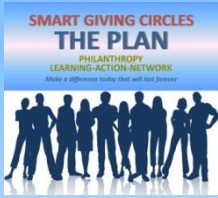
# ADOPT A NONPROFIT/CHAMPION THE CAUSE: BENEFITS TO THE ADOPTED NONPROFIT



As each Giving Circle award grants, the nonprofit grantees are adopted by the Community Foundation as a whole.

Benefits to the adopted nonprofit include, but are not limited to...

BENEFIT	Value
Promotion on-site at Community Foundation & The PLAN networking events.	Priceless
Promoting the nonprofit's fundraising events to The PLAN members, so they purchase tickets &/or donate	Priceless
Volunteers from The PLAN membership, to help with hands-on needs & volunteer days	Priceless
Possible in-kind contribution drives organized by The PLAN members, for tangible goods needed	priceless
Enroll @4 staff & 8 Board members in these Community Foundation events:	
• Board of Trustees Institute (Oct/Nov)	\$250
• Legacy Awards/Annual Meeting (Oct/Nov)	Priceless
• Sweet Charity (March)	\$1,000
• Nonprofit Fundraising Workshops (monthly)	\$350/year/person
• Peer Group for Executive Director (quarterly)	\$150/year/person
• Peer Group for Development Director (quarterly)	\$150/year/person
• Peer Group for Planned Giving Staff/Volunteers (quarterly)	\$150/year/person



# Wrap Up: Smart Giving Circles

## To what degree did we meet our Giving Circle Goals?

- ☐ 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
- ☐ INTERESTING & FUN

## How can we improve our next round of Giving Circles?