SMART GIVING CIRCLES
THE PLAN
PHILANTHROPY LEARNING-ACTION-NETWORK
Make a difference today that will last forever

FACILITATOR & GROUP MEMBER GUIDE

Chester County Community Foundation
28 W. Market Street—The Lincoln Building
West Chester, PA 19382
(610) 696-8211 info@chescofc.org
### The PLAN

**Philanthropy Learning-Action-Network**

*Make a difference today that will last forever*

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#### BASIC MEMBER:

$100/yr

waived for Friends of Eliza

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#### SMART GIVING CIRCLE MEMBER:

CONTRIBUTION TO GRANT POOL:

$250 - $2,500

*Choose what fits you*

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#### 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

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#### THE PLAN: HOW?

<table>
<thead>
<tr>
<th>PHILANTHROPY Learning-Action-Network</th>
<th>PLAN GIVING CIRCLE ($250-$2,500)</th>
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<td>Smart Giving Circles</td>
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<td>Site Visits</td>
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<td>Grantmaking</td>
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<td>Adopt a Nonprofit to Champion</td>
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<td>Charity Chats/Philanthropy Forums</td>
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<td>Volunteer Opportunities</td>
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<td>Happy Hours: Meet &amp; Greet</td>
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</tbody>
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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.

www.chescocf.org
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

- Confidently 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

www.chescocf.org
# SMART GIVING CIRCLES: 2017 SPRING DATES

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

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.

www.chescocf.org
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?
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
501(c)(3) organizations are classified into ten major categories (nonprofit NTEE taxonomy)

1. Arts, culture & humanities...museums, symphonies, orchestras, community theatres
2. Education & research...private colleges & universities, independent elementary & secondary schools, noncommercial research institutions
3. Environmental & animals...zoos, bird sanctuaries, wildlife organizations, land protection groups
4. Health services...hospitals, public clinics, nursing facilities
5. Human services...housing, shelter, sport and recreation programs, youth programs
6. International & foreign affairs...overseas relief & development assistance
7. Public & societal benefit...private & community foundations, civil rights organizations, civic, social, & fraternal organizations
8. Religion...houses of worship & their related auxiliary services
9. Mutual/Membership Benefit...professional societies & associations, fraternal societies, pension & retirement funds
10. Unknown, Unclassified
For-profit business sector

Government sector

Non-profit sector
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)

71% Giving by Individuals
$264.58 billion
increased 3.8 percent (3.7 percent when inflation-adjusted) over 2014.

16% Giving by Foundations
$58.46 billion
was 6.5 percent higher than in 2014 (6.8 percent when inflation-adjusted).

9% Giving by Bequest
$31.76 billion
increased 2.1 percent (1.9 percent when inflation-adjusted) over 2014.

5% Giving by Corporations
$18.45 billion
increased 3.9 percent (3.8 percent when inflation-adjusted) over 2014.

Where are all of the charitable dollars going?

(as a percentage of the total)

32% Religion
$119.30 billion

15% Education
$57.48 billion

12% Human Services
$45.21 billion

11% To Foundations
$42.26 billion

8% Health
$29.81 billion

7% Public-Society Benefit
$26.95 billion

5% Arts, Culture, and Humanities
$17.07 billion

4% International Affairs
$15.75 billion

3% Environment/Animals
$10.68 billion

2% To Individuals
$6.56 billion

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.


* All figures on this infographic are reported in current dollars unless otherwise noted.
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, easily review them. Given 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 or this direct link: https://chescocf.org/receive/find-active-grants/

CAPACITY BUILDING PROPOSALS
Adult Care of Chester County
AGAPAGE de Phoeniex
Art Partners Studio
Arts Holding Hands and Hearts
Association for the Colonial Theatre
Ballet 180
Borough Special Camp
Brenda Williams Red Clay Alliance
Canine Partners for Life
Charles A. Moten Arts & Education Center
Chester Health Services
Chester County Futures
Chester County Hospital Foundation
Chester County Long Term Recovery Community
Chester County Pop Orchestra
Chester County SPICA
Children's Literacy Initiative
Cinco, 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
Depression Counseling Center
Decade to Doorways
Downtown Area Senior Center
Downtown Area Communities That Care
Downtown Community Education Foundation
Dragonfly Forest
Easttown Library Foundation
Friends Association for Care & Protection of Children
Friends of Volney Forge Park
Garage Community & youth center
Health Care Access
Human Services
Interfaith Housing Assistance
Junior Achievement of Southeastern Pennsylvania
Joshua Area Park Authority- Amos B. Nixon Park
Lundale Farms
Metropolitan & Child Health Consortium of Chester County
Operation Warm
Oriole Communities
People's Light & Theatre
Phoeniexville Area Senior Center
Phoenixville Public Library
The Land Conservancy of So. Chester
Unido Inc.
United Way of Chester County
Volunteer English Program in Chester County
Westtown School
YMCA Foundation
Young Moms

GENERAL OPERATING PROPOSALS
Act in Faith
AGAPAGE de Phoeniex
ALS Association Greater PA Chapter
ALS Hope Foundation
American Cancer Society
American Helicopter Museum
Arts Holding Hands and Hearts Inc., (AHHA)
Baker Industries
Barclay Friends
Barcodr for Kids
Bethesda Project
Bishop Shanahan High School
Branchline Red Clay Alliance
Branchline Singers, The
Bridge of Hope Lancaster & Chester Counties
Boy Scouts of America
Cabrini College
Camp Brighter Future
Campbell Village
Cox ISLANDS
Center for Blind and Visually Impaired
Chester County Futures
Chester County Hospital
Chester County Historical Society
ChescoPeds Health Services
ChescoPeds Health Services - Dental
ChescoPeds Health Services - Medical
Church Farm School
Clarke Berkeley Library, Inc.
Clingy Stairs, 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
Depression Counseling Center
David's Driver 83 Inc.
Daylilyford Abbey
Delaware County SPCA
Devereux Foundation
Domestic Violence Center of Chester County
Downtown Community That Care
Downtown Area Historical Society
Downtown Area Senior Center
Downtown Library
Dragonfly Forest
Easttown Library Foundation
Easter PA Conference United Barns Fire Company
Family Lives on Foundation
Family Promise of Southern Chester
Fellowship Health Resource
Friends Association for Care & 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.
GreatPond Society, The
Habitat for Humanity of Chester
Home of the Sparrow
Holy Cross Parish
Holy Family
Hospice of Chester County
Hope Beyond Borders / Coatesville Kids to College
Hopespring Equestrian Therapy
Hunting Authority of the County of Chester
IHM Sisters Camilla Hall
Jonathan Beech Memorial Concert, Inc.
Kelly Anne Dolan Memorial Fund
Kennett Area School Association - After the Bell
Kennett Area Community Service
Kennett Area Senior Center
Kennett Education Foundation
Leipsic Community House
Linda Reid Cancer
Lincoln University, The
Lord's Pantry of Downingtown
Lundale Farm
Main Line Animal Rescue
Main Line Deputy Dog
Main Line Veterans Center
Mannheim Christian Academy
Maternal and Child Health Consortium
Meal on Wheels Chester County
Meinig
Mill at Appletree
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
Parish of the Delaware Estuary
Peacemaker Center, The
Phoenix Animal Services
Phoenixville Area Children's Learning Center
Phoenixville Area Community Service
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
Timberview School
United Way Stability Center
Valley Youth House Committee, Inc.
West Chester Public Library
Westtown School
Wharton Esherick Museum
Wissahickon Conservation Trust
Wynnewood Resource Center
YMCA of Greater Brandywine

CAPITAL & ENDOWMENT PROPOSALS
Bishop Shanahan High School
Church Farm School
GPA Mobilization Ministries
Uptown! Entertainment Alliance

ENVIRONMENTAL PROPOSALS
Aven Grove Charter School
Barnes Foundation
French and Pickering Creeks Conservation Trust
Great Valley Nature Center
Green Valleys Watershed Association
Historic Stroudsburg
Jenkintown Arboretum & Gardens
The Land Conservancy of Southern Chester County
Wissahickon Conservation Trust
Wynnewood 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
Mtg #1: Summary/Next Steps

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

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

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