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*Facilitation Guide for Hosts*

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# Pop-up Giving Circle

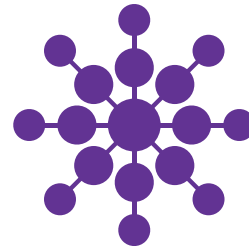
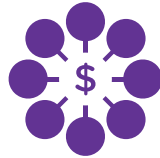
A 90 minute giving circle  
experience



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# Welcome and congratulations! You are about to join a giving circle.

(For the next few hours, anyway.)



➤ You're about to become part of a giving circle, a philanthropic vehicle in which individuals pool their contributions and decide together where to give them away. Through this activity, you—and the friends or family or colleagues or neighbors who are gathered with you—will set up, and operate your own giving circle. Today.

You should know: as you work through this guide, you are joining a philanthropic revolution. A giving circle is a philanthropic model in which individual donors pool their money and other resources and

decide together where to give them away. Why is that a revolution? Because, in just a few hours, it turns us all into philanthropists: it lets us all give with thought, intention, information, and strategy. It pushes us to learn about new issues and causes. And it invites us to reflect on and discuss the values and issues that mean the most to us.

For this activity we will be using a pre-selected guide to organizations, (rather than finding organizations from scratch), one of many time-savers that will help us run a whole grant process in just a few hours.

The process of pooling money and giving it away can be done an infinite number of ways. Today we're hoping for good conversations about values and motivations, deeper understanding of our opinions and knee-jerk reactions, and passionate pitching for the projects which inspire you. The aim of this activity is to help you jump in as easily as possible and get a taste of the giving circle experience in just a few hours. The truth is that you don't need this guide to give away dollars with your friends.

If this experience inspires you to do more, let us know, and we'll happily help you start the giving circle of your dreams!



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How is a pop-up giving circle different from a full-scale giving circle?

## 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"

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

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

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

The circle could discuss for a **full meeting or more!**

## Full-scale Giving Circle

You 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

If this first taste whets your appetite and makes you want to continue the giving circle experience, either by joining a circle or starting your own, great! (There's information to help you do that at the end of this packet.) But even if that doesn't happen, the Pop-up Giving Circle is a success if the conversations you have today are rich, thought-provoking and stay with you for a long time to come.

## Here's what you're about to do:



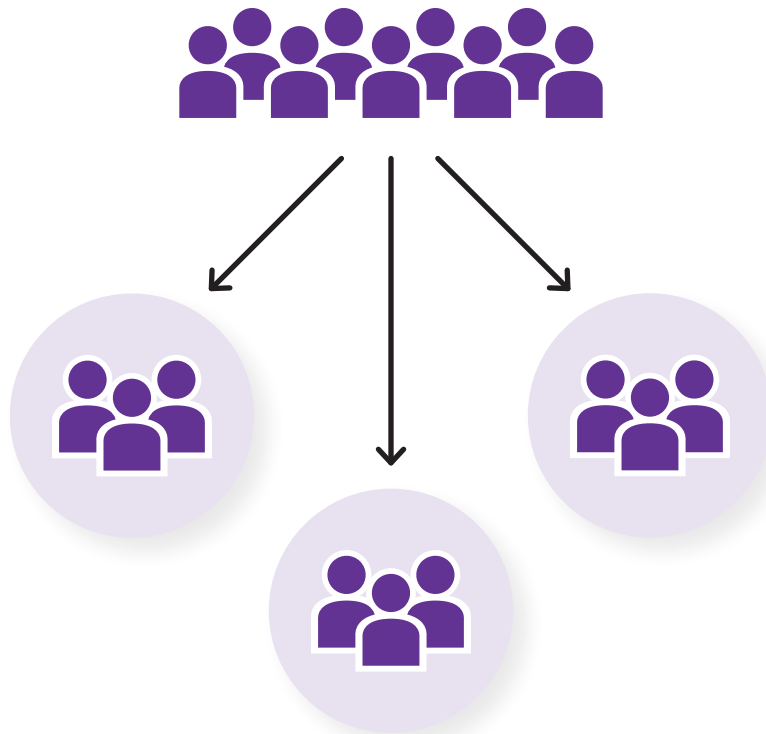
\* We've linked to a bunch of terrific organization directories on our website [www.AmplifierGiving.org/PopUpGivingCircle](http://www.AmplifierGiving.org/PopUpGivingCircle), including the *Slingshot*, *A Resource Guide to Jewish Innovation* and other guides that focus on organizations doing important work in Israel and around the world.



1.

# Create your circle & divide into small groups

Look around—the people in the room with you today are your giving circle. Divide the group into small groups of 3-8 people each. Choose the group size that results in at least 3 small groups.

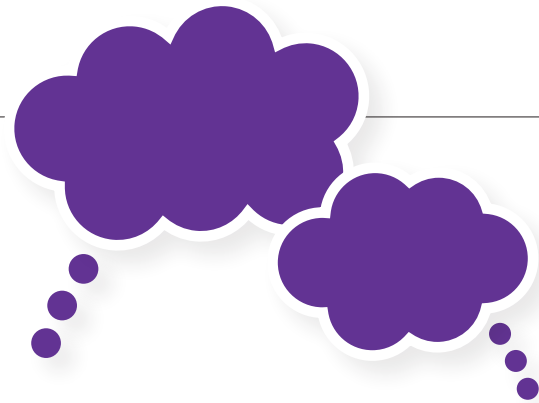




# 2.

## Consider your values

Discuss individual values and find a common set of values to guide you in this exercise.



Values are the core principles that guide a giving circle. Ideally, the members in a giving circle will share a common bond based on values. The trick is finding a way to express those common values in words so that everyone feels connected as a group. Articulating your common values helps to shape a circle's identity and culture, forming the grounding upon which all of the decision-making can rest.

For today, a shared set of values will help your small group align around what you're trying to achieve with your giving and guide your funding decisions. To help you connect your values to the organizations you are about to review, we have organized a selected group of values into two parts: *Why I Give* and *How I Give*.

### DIRECTIONS

1 Take two minutes on your own to read the values on the following pages. **On *Why I Give*, select 2 values that resonate most with you individually. On *How I Give*, use the numbers to plot yourself on each spectrum.** Give it some thought, but don't get stuck. Your choices aren't final; they'll just jumpstart your discussions.

2 Next, you'll need to **agree on shared values for your small group that will guide your decision making.** Have each group member share their choices for both sets of values and look for areas of overlap. Beyond just naming your choices,

share why you chose what you did. For *Why I Give*, select 2 values that you all agree on. For *How I Give*, try to find alignment for your group on one end of each spectrum, so that you end up with 5 guiding values total (2 from the *Why* section and 3 from the *How* section). You may find alignment between your underlying motivations, even if the particular values you choose are different. Remember that you are not wedded to these values beyond this exercise—this is just for today!

3 Finally, write your group's shared values for each section at the top of the **Worksheet** on page 10.

Now, if you have time, stop and reflect.

Whether the people here today intend to continue as a giving circle, to start their own circles or neither, it's useful to check in on their experience. Consider the following questions:

- How hard was this values exercise to do? Why?
- What did you notice about others' choices—and your own?
- What surprised you the most about the group values chosen today? Why?
- What was the most commonly chosen value?

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## Jewish Philanthropic Values

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# Why I Give

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I want to create  
justice/equality  
**Tikkun Olam:**  
Repairing  
the World

We are here to make a difference, to mend the fractures of the world, a day at a time, an act at a time, for as long as it takes to make it a place of justice and compassion where the lonely are not alone, the poor not without help; where the cry of the vulnerable is heeded and those who are wronged are heard.

Rabbi Jonathan Sacks,  
*To Heal a Fractured World: the Ethics of Responsibility*

I feel obligated/  
responsible to give  
**Areyvut: Peoplehood  
& Mutual  
Responsibility**

It is not your obligation to finish the work; nor are you free to desist from it.  
*Pirkei Avot 2:16*

I give because it  
feeds my soul  
**Kedusha:**  
Holiness

Spiritual life is superior to physical life. But the physical life of another is an obligation of my spiritual life.  
Rabbi Israel Salanter

I give primarily  
because it  
helps others  
**Tzedakah: Charity**

The poor will never cease from the land, therefore I command you 'You shall surely open your hand to your brother, to the poor and the needy in your land.'  
*Deuteronomy 15:11*

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# Jewish Philanthropic Values

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## How I Give

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**Locally**



**Globally**

A poor person who is a relative takes precedence over anyone else. The poor of one's household take precedence over the poor of one's city. The poor of one's city take precedence over the poor of another city.

Maimonides, *Mishneh Torah, Laws Of Gifts To The Poor*, 7:13

When one is starving, the one who is starving takes precedence.

*Responsum of the Hatam Sofer 2:231*

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**To Jews Only**



**To Everyone**

All Israel and all who are associated with them are like brothers, as it is said, "You are children of the Lord your God" (*Deuteronomy 14:1*). And if a brother does not show compassion for another brother, then who will have compassion for him? And to whom can the poor of Israel look? To the idolatrous nations that hate them and pursue them? They can only look to rely upon their brothers.

Maimonides, *Mishneh Torah, Laws Of Gifts To The Poor*, 10:2

Our rabbis have taught: We support the non-Jewish poor along with the poor of Israel, and visit the sick of the non-Jews, along with the sick of Israel, and bury the poor of the non-Jews, along with the dead of Israel, in the interests of peace.

Babylonian Talmud, *Gittin 61A*

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**To Organizations Supporting People in Need**



**To Educational/Cultural Organizations**

If however, there is a needy person among you...do not harden your heart and shut your hand against your needy kinsman. Rather you must open your hand and lend him sufficient for whatever he needs...For there will never cease to be needy ones in your land; therefore I command you: "You shall surely open your hand to your poor and needy kinsman, in your land."

*Deuteronomy 15:7-8;11*

In the 1960s, I was deeply involved with the effort to persuade the Federation system to fund Jewish education as well as services for the poor. Once someone posed the question to me as a stark either/or: "if you had to fund a hospital for the poor or a Jewish school, which would you choose?" When I said, "I'd fund the Jewish school," my interlocutor cried that he had unmasked me as "an enemy of the poor and the sick." I replied: "but wait - you forgot to ask me what I will teach in the Jewish school. I will teach them to open hospitals that care for the poor."

Rabbi Irving "Yitz" Greenberg

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# 3.

## Read Organizational Profiles

Learn about different organizations and talk through your personal interests and group values.

> The leader divides the organizational profiles into groups of 4 (hopefully before the meeting begins) and distributes each group of 4 to a small group. Once your group has its four profiles...

### DIRECTIONS

**1** Take out your Organization Guide.

**2** Write the names of your team's organizations in spaces 1 through 4 on the **Worksheet** on page 10.

**3** Find the organization in your copy of the guide and have someone in your team **read the profile aloud**.

**4** **Jot down your thoughts as you're listening, then take two minutes to discuss as a team.** Does this organization's mission and approach resonate with you personally? Does it match your team's chosen values? Fill in the appropriate boxes on your worksheet. Each team member should be doing his/her own scoring—so while it's important that you listen to each other, you need not agree on scores.

**5** **Speak up if you have any personal connections to the applicant**—outside information or previous experience with an organization is great data to have! Just make sure you disclose it to your team, so that everyone is working with the same information.

**6** **Repeat steps 2–4** for each organization.

*Take your time with this process. Sometimes the instinct at this stage is to scribble notes, find quick alignment, and move on to the next applicant. Remember that the goal is to have a conversation with your team about what's most important to you, both individually and as a group. Don't skimp on the conversation!*



# Group Values: Why We Give

1. \_\_\_\_\_ 2. \_\_\_\_\_

# Group Values: How We Give

1. \_\_\_\_\_ 2. \_\_\_\_\_ 3. \_\_\_\_\_

ORGANIZATION NAME	IS THIS ORGANIZATION INTERESTING TO YOU PERSONALLY? SCALE OF 1-5 (5 IS THE HIGHEST)	HOW WELL DOES IT MATCH YOUR GROUP'S SHARED VALUES? SCALE OF 1-5 (5 IS THE HIGHEST)
1.	1 2 3 4 5	1 2 3 4 5
2.	1 2 3 4 5	1 2 3 4 5
3.	1 2 3 4 5	1 2 3 4 5
4.	1 2 3 4 5	1 2 3 4 5



# 4.

## Whittle down your options

Choose the one organization that your small group can live with—and don't forget that the conversation is as important as the decision!



➤ It's time to make some choices. Your goal in this step is to agree as a team on one organization to pitch to the whole group. This step is about consensus, not unanimity. You want to figure out the organization that the entire team can live with—even if it's not every person's favorite.

### DIRECTIONS

**1** Start by **eliminating any organizations that really don't resonate with some teammates**, and then **spend the bulk of your time on the most plausible candidates**. For each one, why do you want to support this organization (or why not)? What about the issue they're addressing or the way they're addressing it is most meaningful to you? If your small group can't agree on a single organization through conversation and consensus, take a majority-rules vote. If you still don't have a choice, give everyone two votes (to be used on different organizations).

**2** Tally up the total votes to find your winner.

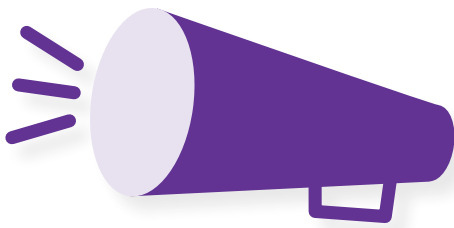
*Finding alignment may be difficult. Don't get discouraged—you're up against a tough task, and in a short time! Most giving circles go much deeper, with dedicated committees and meetings to hash out everyone's opinions and identify areas of common ground. Remember: this is about getting a taste of the giving circle experience, deliberating on important and meaningful issues as a group, balancing different perspectives, and learning to compromise and move forward together. The process is more important than the outcome.*

Stop and reflect again. Check in with the whole group:

- How did it feel to balance your preferences with your teammates'? Do you feel your small group arrived at the "best" solution? At the "least-worst" solution? (And what's the difference between those two?)
- Do you stick to your small group values? If not, what does that teach you?
- What additional information do you wish you had about the applicants? How would you want to gather that information?

# 5.

## Pitch!

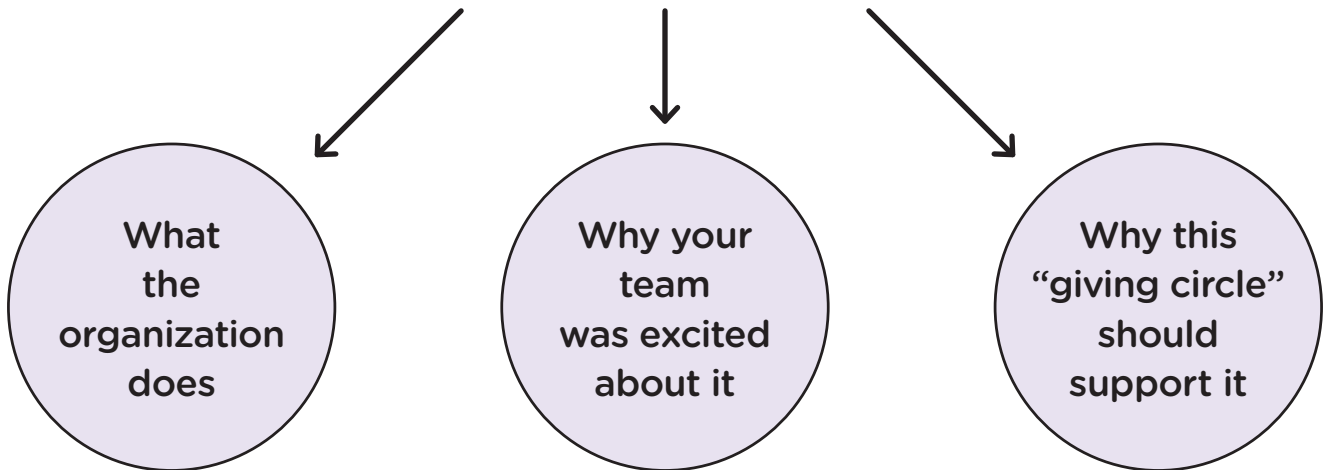


Represent your small group's chosen organization to the larger group.



With each team representing a single organization, it's time to pitch. Each team nominates one member to present their organization to the whole group and try to win votes. If you're presenting, be dynamic, energetic, and specific. Have fun with it!

Remember to tell the group:



*The leader should keep time—we recommend giving each team a 65-second pitch, with a timer set for 60 seconds. When the chime goes off, the presenter can finish their sentence.*

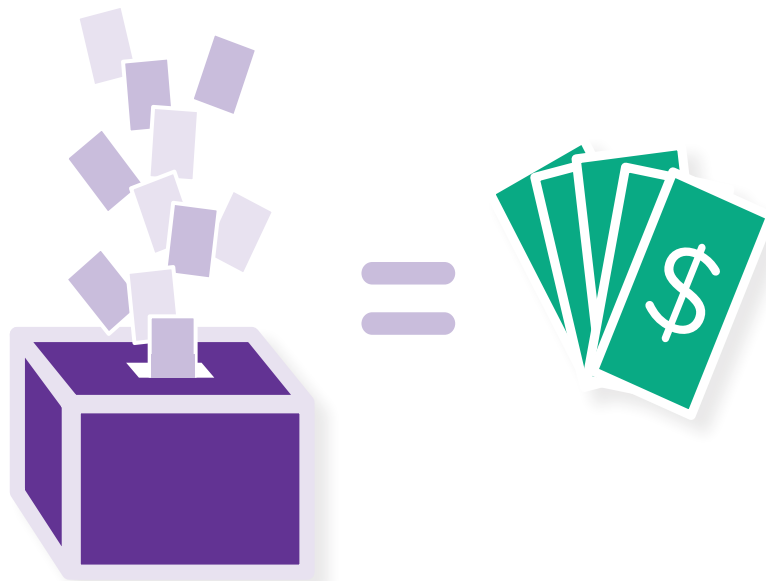
*When you are not presenting, remember to listen and be enthusiastic about others' presentations. (A little applause never hurts.) **In your workbook, write the names of the finalists and your notes.***



# 6.

## Vote & Make a Grant

Vote on your choice of organization and discover who will receive the grant!



It's time to vote for the winner. **Everyone gets a vote of his/her own**—you do not have to vote with the rest of your small group. After giving everyone a few minutes to think, the leader should go around quietly with the Voting Worksheet to collect each person's vote.

Read out the tallies and announce the winning organization! **Let Amplifier know who will be receiving the grant by sending us an email: [Hello@AmplifierGiving.org](mailto:Hello@AmplifierGiving.org).** As a final step, decide how you're going to notify the winner—and who gets the honor and pleasure of doing so. Be sure to let them know about Amplifier when you explain the grant and the Pop-up Giving Circle.

# Giving Circle Express Votes

FINALIST ORGANIZATION NAME	GROUP'S TALLY
1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	

GROUP'S FINAL  
SELECTION:



15–30  
MINUTES

# 7.

## Close & Debrief

Reflect on this experience as a group.

With the grant made, your giving circle is now closed, but there's a key final step. Wrap up this experience with one final whole-group discussion. The following questions may be helpful for guiding your closing conversation:

What were you surprised by?

Did you ultimately select a grant recipient based on your originally chosen values? Why or why not?

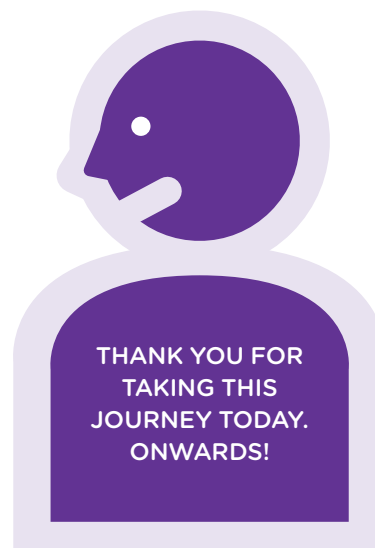
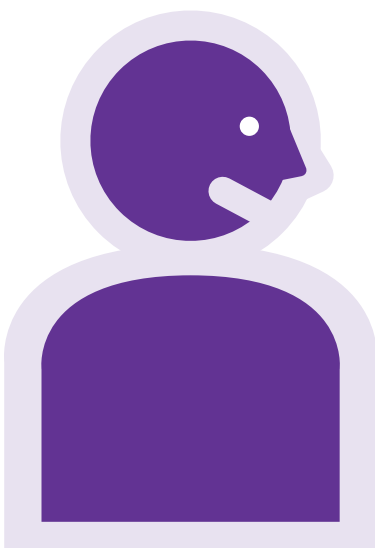
Was it easier or harder to talk about organizations you were more familiar with?

What does this teach you about grant allocations?

What does this teach you about how organizations talk about their work?

What does this group—or the individual members within it—want to do next?

*As we've said before, this is just a taste of what a giving circle can be. This is a relatively short (and intense!) activity, but all the critical elements are here: agreeing on shared values, learning about potential grant recipients, and using an inclusive process to decide between them. The rest of the experience is totally customizable—no less and no more than what you and your fellow members make it.*









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# Building on today's experience

If you're thinking of starting or joining a giving circle after this experience—and we hope you are—you may be asking:

*How do I find proposals from organizations that I might care about?*

*What information do I need to make decisions?*

*How do I get my group started—and how do I keep it going?*

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## We're here to help



The Jewish Giving Circle Movement

We're eager to hear from you and to help you build the giving circle of your dreams.

Visit [www.AmplifierGiving.org](http://www.AmplifierGiving.org)

or reach out to

**Hello@AmplifierGiving.org**