



Give Better. Give Together.

A 7-Part Series on Launching and
Sustaining a Successful Jewish Giving Circle

Published by Amplifier in partnership
with eJewish Philanthropy



Contents

Page 3: Becoming an Empowered (Not Reactive) Giver

Page 9: More than Money: Engagement, Education & Building Community

Page 15: Building Your Very Own Giving Circle

Page 18: The Secret Sauce: Grantmaking

Page 23: Sacred Conversations About Money

Page 26: How Generation Z ‘Shakes Up’ Philanthropy

Page 30: Your Organization’s Best New Asset: A Giving Circle

Giving circles, groups who pool donations and decide together which causes to support, are a powerful tool for providing anyone—at any age, in any place, at any giving level—with access to an exciting, intentional giving experience. Giving circle members learn and do something about the issues that mean the most to them within their community of friends, family, fellow program alumni—anyone.

As part of our effort to expand and strengthen giving circles in the Jewish community, Amplifier: The Jewish Giving Circle Movement is proud to present this seven-part series to help you start and sustain a giving circle inspired by Jewish values. This series draws upon Amplifier’s Resource Library and the experiences of dozens of giving circles already in the Amplifier network.

PART 1:

Becoming an Empowered (Not Reactive) Giver

By Felicia Herman



Keren Baktana

We Can Give Better

As the readers of *eJewishPhilanthropy* know well, we've just wrapped up the annual end-of-year fundraising crush. Nearly a [third of online contributions](#) are made in December, with 10% coming in the last three days of the year alone.

In a way, the annual barrage of street corner, mailbox, and inbox appeals is useful for potential givers: it keeps giving at top-of-mind during a season that's also about over-eating, over-spending, and over-the-top celebrating. At their best, these appeals inspire us (or guilt-trip us) to be generous.

Far too often, however, the onslaught of requests also produces anxiety and annoyance. Without proactive guiding principles or objectives, our giving can feel incoherent, haphazard, and random. Our donations tend to go to organizations that find us and win our attention—those with persistent and compelling marketing tactics, or with familiar household names, rather than those with the best track records or that best meet our personal values and goals.

This reactive approach to giving makes giving far less rewarding and meaningful than

it should be. While we usually think about giving in terms of the impact on the recipients, it's also critically important to consider the impact on ourselves as givers as well. After all, if giving doesn't inspire us or make us feel like we're making a difference, then we'll be less likely to give in the future, or to give as generously as we can.

How do we take back our experience of giving and become producers of our own philanthropic experiences? How do we become proactive, empowered, intentional—and yes, even joyful—givers?



Roots and Branches

We Can Give Together

As I spoke about recently in my [ELI Talk](#) “Empowered Philanthropy,” one answer is to start or join a giving circle.

A giving circle is a group of friends, family, or colleagues who pool their charitable donations and decide together where to give them. Giving circles answer many of the challenges of reactive giving. They're:

- **Intentional:** Giving circle members decide together what values and issues are most important to them, and then decide which organizations to fund.
- **Recurring:** Most giving circles meet regularly (e.g. once a month) and operate on a repeating grantmaking cycle, which creates ongoing conversations about and engagement with giving.
- **Amplified:** Individual contributions add up—so though you might give just \$500, you can help direct a grant of, say, \$50,000. Intellectually, members benefit from each other's knowledge of issue areas and organizations.

- **Social:** Giving circles don't just get together to make grants. They eat, drink, laugh, and build a community around shared values.

Giving circles start from a place of asking members: What are your philanthropic values? What's the change you want to make in the world? Circle members then learn together about the issues that most inspire them, and they work together to effect change through their collective giving. In many cases, circles also offer non-monetary assistance to grant recipients, including volunteer service, pro bono consulting, introductions to other potential supporters, and more.

The beauty of giving circles is that they're infinitely customizable. Circles come together around any issue or set of values: some Jewishly-inspired circles give to Jewish causes, and others give to non-sectarian causes; there are Asian-American giving circles, African American circles, women's circles, teen circles, LGBT circles, alumni circles, and on and on. As I'll discuss in a later post, giving circles can be independent (like Natan or [Slingshot](#)) or housed within institutions like [community foundations](#), [Federations](#), [JCCs](#), [synagogues](#), [camps](#), [alumni groups](#)—you name it.

I came to the giving circle experience first as a member, and then as executive director, of [The Natan Fund](#), which engages young professionals in giving to Jewish and Israeli social innovation. At Natan, which is just one “flavor” of giving circle, our members strategize together about the goals and parameters of our grants; they read grant applications from dozens of organizations working in our multiple focus areas; they learn



Camp Kadimah

from content experts, community leaders and other philanthropists at regular events; they interview potential grant recipients and conduct site visits; and together they decide where Natan's grants will be allocated. Members choose the grant area(s) their contributions will support, which allows each person control over where their money goes, with full transparency into how funds will be spent by grant recipients.

Working collaboratively, Natan members leverage the financial and intellectual capital of other members and together, they make wise decisions that have real impact. Natan has given away almost \$10 million in its lifetime—consisting entirely of member contributions.



*Jewish Women's Foundation of New York—
Sharsheret site visit*

Giving circles offer a version of *tzedakah* that is empowered, intentional, and fun. For hundreds of thousands of members worldwide, they have unlocked new philanthropic, educational, and communal experiences. Most importantly, they really work: research has shown that members of giving circles give more, give more strategically, and engage more deeply in their communities than non-giving circle members.

We Can Build a Movement

People who participate in giving circles—of all shapes and sizes, with any type of focus area—know that they're one of the most powerful ways to engage people in meaningful experiences of giving, learning, and building values-driven communities.

So what would it take to significantly expand the number of giving circles inspired by Jewish values? What resources could we create to make starting and sustaining a giving

circle as simple, smart, and efficient as possible—to engage as many people as possible in this awesome experience?

Thus was born [Amplifier: The Jewish Giving Circle Movement](#), the result of the ideas and hard work of dozens of partners who together envisioned and prioritized a toolkit of online and offline resources.

Natan is “powering” Amplifier, which is being supported in its pilot phase by a seed grant from the [Charles and Lynn Schusterman Family Foundation](#), but in the true spirit of collaboration, we’re harnessing the wisdom of our colleagues and partners at every stage.

We’ve created a [directory](#) of giving circles to make it easier to connect to existing circles for funding, advice, potential membership opportunities, even for partnerships between circles.

To share best practices between circles and to make starting and operating a circle as efficient as possible, we created [online circle administration tools](#) and a [Resource Library](#) to host materials written by Amplifier and our partners.

To tackle the huge set of challenges circles face around grantmaking—identifying potential grant recipients, getting the word out about grant opportunities, and organizing the administrative elements of the application review process—we built a Common Grant Application viewable only by registered giving circles, which also populates a publicly-accessible, searchable [directory of organizations](#). Circles can use our [Grant Opportunity](#) system to issue public calls for applications, and the administrative tools for circles enable them to review, discuss and select applications with their group.

Offline, Amplifier is providing support and advice to giving circles through incubators, coaching, training, and convenings. (You can still register for upcoming convenings in February in [San Diego](#) and March in [Tel Aviv](#).)

Our first pilot program, a giving circle incubator, launched 16 new giving circles around the world with 150+ members who have already [given over \\$75,000](#) to organizations focusing on a wide range of causes.

Our goal is nothing less than to transform the experience of giving inspired by Jewish values, and to inspire more people to use giving as a way to engage in Jewish values and Jewish life. As we’ve seen at Natan and in the circles we partner with, being part of a giving circle is a way that *all of us* can be actively, joyfully involved in the holy work of spreading our money around, encouraging things to grow. If you are interested in learning more, please reach out to Hello@AmplifierGiving.org.

Felicia Herman has been Executive Director of The Natan Fund since 2005. She is a frequent writer and speaker on philanthropic and social innovation in the Jewish community. She recently co-edited The Jewish Innovation Economy: An Emerging Market for Knowledge and Social Capital (Jumpstart, Natan Fund, Samuel Bronfman Foundation, 2011) and

chaired the Study Advisory Committee for From First Fruits to Abundant Harvest: Maximizing the Potential of Innovative Jewish Start-Ups (Bikkurim, 2012). Felicia is a recipient of the Jewish Funders Network's JJ Greenberg Memorial Award, which honors foundation professionals under age 40 who have demonstrated extraordinary leadership in the field of Jewish philanthropy. She serves on the board of Bikkurim: An Incubator for New Jewish Ideas, on the Advisory Councils for the Joshua Venture Group and Jumpstart, and as an informal advisor to many of Natan's grantees around the world. Previously, Felicia was Research and Program Officer at Jewish Life Network/Steinhardt Foundation. She holds a Ph.D. in American Jewish History from Brandeis University, and she lives in Brooklyn with her husband, David Ben-Ur, and their three children.

PART 2:

More than Money: Engagement, Education & Building Community

By Felicia Herman



Natan Fund Israel trip

The first thing most people think of when they hear “giving circle” is money. That makes sense: as I discussed in [Part I](#) of this series, giving circles are about giving money and empowering givers to give proactively and thoughtfully to effect real change in the world.

But we unlock giving circles’ true power when we begin to think about them also as multi-faceted programs with tremendous potential for engaging, inspiring, educating, and building community. That people are also giving through this mechanism is often just icing on the cake.

Part of [Amplifier’s](#) goal is to demonstrate the diversity of giving circles, helping people to realize that anyone—any group of individuals, any institution—can adapt the model in beneficial ways. Giving circles are yet another example of the trend toward empowered Jewish experiences—an excellent way to experience being part of a Jewish community *of your own making*. What [independent minyanim](#) have done for Jewish religious life, what [Kevah](#) is doing for customized Jewish learning, and what [Moishe House](#) does for creating grassroots living communities, giving circles can do for Jewish giving. Just like

we believe people should feel [empowered to give](#) in ways that resonate with their values and goals, we also believe that individuals should be empowered to create their own communities and to be inspired by real and substantive engagement with the issues that mean the most to them.

Form Follows Function

We like to say that giving circles are infinitely customizable. Form follows function: each giving circle reflects the culture and the goals of the people who are engaged in it, the type of giving the group wants to do, and—sometimes—the goals of an entity that is hosting or sponsoring the circle.

There are (at least) four ways to classify Jewish giving circles; each circle may very well plot itself differently on each spectrum:



As an example, the giving circle that I lead, [Natan](#), lands on the left on all four spectrums. We strive to emulate best practices in philanthropy in our grantmaking;



Acharai Fund Purim party

we see our grant review process and our event calendar as ways to educate members, connecting them to Jewish issues and Jewish life in new ways (including an annual trip to Israel); we plan events, meetings, and other network-weaving activities, positioning Natan as an important personal and professional community for our members; and we primarily support Jewish and Israeli organizations. These traits and decisions reflect the interests of our particular group of members.

Other circles look very different—and that’s a good thing. There’s no standard, no “right” way to set up a giving circle: a successful circle understands its goals, [maps its assets](#), and creates a structure to fit.

This is even true in terms of how a giving circle defines what it means to be a “Jewish” giving circle. Amplifier defines a Jewish giving circle as one that is explicitly inspired by Jewish values—no matter where it gives. This maximally inclusive description enables *anyone* to participate in a Jewish giving circle—you don’t even have to be Jewish! Some circles are inspired by Jewish values to give universally; others split their funding between Jewish and non-Jewish organizations; and others, like Natan, focus primarily on giving to Jewish organizations. (We discuss this topic in a little more depth in [Giving to Jewish Organizations](#) in the Amplifier Resource Library.)

Indeed, being “infinitely customizable” means that there’s no end to what giving circles can accomplish, no set of rules that giving circles must follow. It also means that there’s no limit to how many people can be engaged, in what ways, and for which purposes. Consider the following examples of the many purposes that giving circles

can serve. Hopefully they will jumpstart your thinking on how you or your organization might create a giving circle in the near future!

Giving circles can engage people in Jewish life, Jewish values, and Jewish issues (and different groups can define those terms differently, as they see fit).

- A group of families can create a giving circle as a way to teach their children about giving, to engage in community service together, and to create their own Jewish community. They celebrate holidays together, talk about Jewish values around giving, and complement their financial support of local organizations with volunteer time. (Philadelphia's [Acharai Fund](#) exemplifies much of this.)
- A program focused on expanding access to Jewish learning can create a giving circle with a curriculum exploring Jewish values about giving. For example, alumni of The Dorot Fellowship in Israel use serious Jewish learning to guide the giving of their [HEKDESH](#) giving collaborative. (Check out their incredible [resources](#).)

Giving circles can build sticky, values-driven communities, offering families, friends, colleagues or neighbors a way to connect regularly while doing something meaningful together.

- A group of friends can create a giving circle as a substantive way to get together (in person or virtually) with each other every month or so. They may want to stay



Slingshot Fund site visit

connected and to have conversations about issues that matter to them. The focus area of the giving might change over time as new issues come to the fore. They're invested in the impact of the circle on the group—its ability to deepen their connections to each other in meaningful ways—as well as in their giving. (Some examples are [T'Micha](#), [The Giving Circle](#), [Jewish Giving Circle—Berkeley](#), and [The Givers' Minyan](#).)

Giving circles can educate people about particular issues—while actually doing something about those issues (i.e. giving).

- A community foundation, a private foundation, or a Federation can host a short-term giving circle for donors interested in a particular issue, where the philanthropy and education pieces are taken very seriously, but building an ongoing community of people who regularly give *together* may be less important. (For example, see [Ripe For Change](#), a collaboration between 21/64, the Nathan Cummings Foundation, and the New World Foundation to educate and catalyze giving to transform food systems.)
- A group of donors interested in a particular issue or field can come together to learn about and transform it. They leverage each other's experience, expertise and financial investments, and they do a mix of collaborative and independent grantmaking. The emphasis is less on community-building, and more on learning about the field and devising new ways to collaborate. (See [Areivim](#) and [The Westbury Group](#), among many other examples.)

Giving circles engage people in voluntarism and civil society, and educate them about the nonprofit and philanthropic sectors.

- A teen foundation might prioritize building a Jewish community within the group and giving members experiential leadership education. Very few parameters might be put around what the group can give to—but a lot of energy is dedicated to the experiences and education of members in the group. (Check out [Rose Youth Foundation](#), [The Jewish Community Youth Foundation](#), and the 100+ other members of the awesome [Jewish Teen Funders Network](#).)
- [Nonprofit professionals](#), [business leaders](#) and others who have expertise to give in addition to money can create giving circles that provide pro bono organizational consulting to grant recipients ... while also building a professional network for circle members. Grants can be given to organizations working in any issue area—the criteria for selection might focus instead on grant recipients' organizational development needs.

Giving circles can involve stakeholders and new people in organizations in new ways that can (but don't have to) involve giving to that organization as well.

- Alumni of a program or fellowship can participate in a giving circle as a way to continue to engage experientially with the values of their program and to build a community and network of alumni. Again, where the money goes isn't as important to anyone as is the opportunity to continue to engage with the program and to meet other alumni. (So many examples! The Dorot Fellowship's [HEKDESH](#), [The Bronfman Fellowships Alumni Venture Fund](#), [Challah For Hunger's Alumni Giving Circle](#), [Wexner Heritage Program Alumni in Atlanta...](#))
- A [JCC](#) (or a [synagogue](#) or a [community foundation](#)) can use a giving circle as part of its mission to build values-driven communities among subgroups of members, using the organization's resources to engage them in Jewish life as well as in giving, whether the money goes to the organization itself or elsewhere.

In the next part of this series, I'll walk through some of the steps to starting up a new giving circle. For now, I hope it's clear that *anyone*, at any level of giving, with any focus area, caring about any issue, in (just about) any organizational framework—or independently—can start or be part of a giving circle. The clearer you can be about the many goals of your circle, the better chance you will have of creating a meaningful experience for yourself and other participants.

Take the (Easy) Next Step

I've drawn heavily on [Amplifier's Giving Circle Directory](#) in this post to give a sense for the diversity of existing Jewish giving circles. For deeper dives on some of the issues covered in this post, check out Amplifier's [Resource Library](#); in particular the [Case Studies](#) of different circles; [Giving Circle Essentials](#), our introduction to giving circles; and [Map Your Assets: The 3Ts / 3Ws](#), which discusses the many things people might "donate" to a giving circle beyond money.

PART 3 :

Building Your Very Own Giving Circle

By Felicia Herman

You've decided to start a giving circle—great! You and your group are about to embark on an exciting journey. You'll do some real good in the world while learning a great deal, connecting with incredible people, and having a lot of fun.

The most successful circles are those that spend time at the beginning thinking through some of the questions, issues and opportunities that will come up throughout their time together.

Although some circles go through just one grant cycle together, others last for years. Investing some time at the outset in thinking through logistics, group values, and the grantmaking process will generate great benefits over the life of your circle.

First things first: as you're getting your circle off the ground (or anytime throughout your circle's experience), please reach out to the [Amplifier team](#) for help. We're happy to give advice and to connect you with other people who can help you on your way. We'll also help you set up a giving circle profile on the Amplifier site so you can use the tools we've developed to help you manage your circle and your grantmaking process. (Check out [this video](#) for an overview.)

Now, let's get started. In [Giving Circle Startup Questions](#), we lay out some of the initial questions you might want to consider even before you gather people together. Who makes the final decisions is up to you: in some circles, the founder(s) or organizational hosts figure out the answers to some or all of these questions before the circle launches; in others, the decision-making is done by the group once it gathers. [Giving Circle Building Blocks](#) walks you through how to make decisions about logistics, group values, and grant focus areas in group contexts.

Some initial questions to consider:

- **The Big Picture:** What kind of circle are you creating? How formal or informal, how big or how small? (See the checklist on p. 16 of [Giving Circle Essentials](#) for help.) [How Many Meetings](#) will you have and what will you do at those meetings—grantmaking, or social and educational events as well?
- **Membership:** Who will be part of this circle—friends, family, alumni of a program you were part of, members of a particular community? How many members do you want to start off with? (In our experience, 5-20 is good.) What will you ask them to contribute—how much money and time, and any other things like volunteer time and

professional services? ([Map Your Assets](#) can help you think this through.) Do you want to hold a [Giving Circle Express](#) workshop to give everyone a taste for the experience before they commit to joining?

- **Logistics:** Where will you meet and how often? Who's in charge of scheduling, snacks, materials, facilitation? [Where will you keep the circle's money?](#)
- **Grants:** How often will you make [grants](#), how large will they be, and what will your review process look like? Do you already have a focus area for the grants in mind, or will this be something the group decides? Will you give to Jewish or nonsectarian organizations? Will Amplifier's [common grant application and review system](#) work for your group? In our materials, we talk about how to create a grantmaking process for your circle that reflects what you're actually offering to potential grant recipients. Even \$500, deployed intelligently, can make a real difference! But you also need to structure your grant process to reflect what you're giving, so that applicants don't invest more time applying than they can potentially receive in a grant.
- **Group Values:** Amplifier believes that "Jewish" giving circles are those that are inspired by [Jewish values](#)—no matter what they give to. What Jewish and other values underlie your members' approach to giving?

One rule of thumb to keep in mind as you consider these questions is that the most successful circles are those that best match the goals and the assets (financial, social, intellectual, or otherwise) of their members.

Truly great giving circles also respect the time and resources of grant applicants and recipients, and they work to balance members' interests and needs with the needs of the organizations and communities the circle supports.

Giving circles are infinitely customizable: each will have a different combination of answers to the questions above. But there is some advice that we can offer to all circles, drawn from the experience of the many circles in the Amplifier network:

Recruit people who are fans of the leverage that comes from group decision-making.

Giving circles aren't for everyone. Whether the group makes its decisions by voting or by consensus, members need to accept that not everything they like will get funded, and that not everything that gets funded will be their first choice. Members need to trust the group and its process and be happy (or at least willing) to engage in the give-and-take that comes with being part of a team.

Giving circles take time, and they're worth it.

Time for planning, meeting, reviewing applications and voting. Time (maybe) for site visits, events, networking, and celebrating. Make sure everyone is aware of the time commitment from the beginning and agrees to do their best to show up consistently; and make sure at least one person is responsible for the all-important job of scheduling.

Think about your circle's expenses.

Who will cover the cost for meetings—especially the snacks? (Always have snacks.) Will there be additional costs like educational events, fees for financial or administrative hosts, perhaps even site visits to grant applicants? Your circle may start off small, with members sharing or rotating responsibility for expenses—or you may want to incorporate some shared way of covering circle expenses from day one.

Most importantly: stay humble, respect everyone's time, and celebrate!

Manage expectations about what your circle can accomplish, given the amount of money and time that members are contributing. Shape the requirements for members to meet their expectations and goals, and right-size your requirements of grant applicants to balance what you are potentially giving them. And don't forget to celebrate—the end of a grant cycle, for example, is a great time to celebrate what your circle has been able to achieve so far.

There are now dozens of people in the Amplifier network who have started giving circles on their own, with their friends, with their families, in alumni networks, and at organizations like synagogues, JCCs, Federations, and community foundations. [Reach out to us](#) and we'll be happy to connect you to the coaching, resources, and tools you need to launch a successful giving circle.

PART 4:

The Secret Sauce: Grantmaking

By Jackie Fishman and Felicia Herman

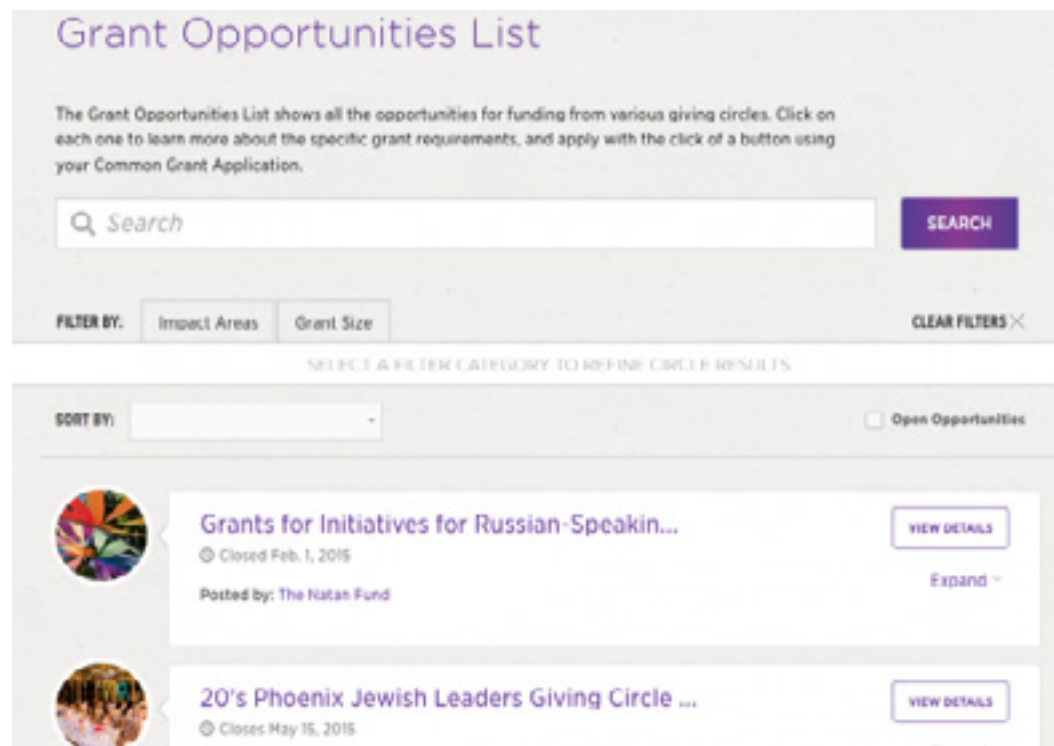
In the first three posts in this series, we looked at how giving circles are a [critical tool for empowering givers](#) and thereby catalyzing more giving; we introduced the many things [other than money](#) that giving circles are also about—including engagement, education, and community-building; and we walked through some of the [initial steps](#) to get a giving circle off the ground.

Now we turn to the “secret sauce” of the giving circle experience: the grantmaking. This is the moment when members will gain an incomparable education in both philanthropy and the issues being addressed by the circle’s grantmaking.

And while this process is of course similar to serving on a foundation board, or Federation or community foundation allocations committee, giving circles open up these types of experiences to anyone, at any giving level.

So how do you do it well? We offer a few pointers below, along with a selection of Amplifier resources to make good grantmaking as simple as possible:

- The Resource Library, especially the [Grantmaking](#) section, written by Amplifier and some of our amazing partners.
- Searchable, [public profiles](#) of hundreds of great nonprofits and initiatives. If you’re a registered giving circle user on Amplifier, you’ll also be able to see the Common Grant. Applications that many of these organizations have submitted.
- The ability to invite organizations/initiatives to apply for your grants through [Grant Opportunities](#).
- A searchable [directory of other giving circles](#) so you can reach out to those with similar interests, giving levels, and/or membership sizes to learn how they handle their grantmaking (and everything else!).
- [Amplifier staff](#) and our network of coaches and mentors who can help guide you in this process.



Decide What Matters Most

Giving circles offer the opportunity to experience “strategic philanthropy”—meaning that a giving circle is proactive (rather than reactive) in its giving. A circle starts by asking some of the questions below, and then develops a funding strategy to match its goals:

- What kind of change are we trying to achieve through our giving circle?
- What are the most effective and efficient ways to accomplish our goals?
- Where are the bright spots (best organizations/programs/people) in the landscape working on these issues?
- What else do we need to learn to make smart decisions?
- What impact do we want our grantmaking to have on the issues and organizations we care most about? (And perhaps: How will we measure that impact?)
- How much time do circle members want to spend on the review process? Should we have a one-stage or multi-stage application process?
- Will our call for proposals be public or private?

Our one-stop-shop introduction to giving circles, [Giving Circle Essentials](#), breaks the grant process down into 9 steps, and other Amplifier resources help you think through questions like whether your circle should support [general operating expenses or only specific programs](#), whether you should give [multi-year grants or one-year grants](#), whether and how to conduct site visits, how to say yes and no to applicants, etc.

Make as much of the timeline and process known to members and applicants up front so they know what to expect and when. *Giving Circle Essentials* and the [case studies](#) on the Amplifier site also offer models of how different giving circles answer many of these questions at the end of Section 7.



Map Your Assets

Through a humble and realistic mapping of your giving circle members' assets, you may realize that you can bring many different types of resources to the organizations your circle wants to support. Money, social capital (connections to people and to networks), and expertise can all be valuable to grant applicants. For example, circles where the members bring skills that are relevant to their grantee organizations often couple financial support with pro bono consulting.

Mapping your assets can also come in handy even when your circle decides not to support a particular organization. Could you make introductions for the organization to other potential donors, partners or volunteers? Is there non-financial support your circle could provide? When you're saying no to an applicant, the ability to steer the conversation in this direction makes both sides feel better and can often provide real value to the organization—sometimes even more than your grant would have.

Partnership, Not Power Trip

The funder-grantee relationship is an important one, and one that is often imbued with inherent power imbalances. One side has the money, the other side needs the money. Too much empowerment on the funder side can lead to power trips—a sense that the funders know better than the organizations on the ground.

Ideally, however, the relationship should feel much more like a partnership. As our wise friends at the Lippman Kanfer Family Foundation have put it:

“It is important to recognize that donors and nonprofits have an interdependent

relationship—nonprofits cannot do their work with the resources donors provide and donors cannot affect positive change in the areas they care about without nonprofits to do the day-in and day-out work in the field. Approach nonprofits with respect for their role in this partnership.”

Before you start down your grantmaking path, think about the kind of relationships you want to have with organizations who receive your grants, your expectations, and the criteria you plan to use to build those relationships. Launch your grantmaking process with the *kavanah*—intention—of building a respectful, mutually beneficial partnership. For example, we love this text from the [Avot d’Rabbi Natan](#), a collection of sayings and stories written around the time of the Talmud:

“Greet every person with a pleasant countenance.” [Pirkei Avot 1:15] What does this mean? It teaches us that even if a person gives someone the most precious gifts in the world but his face is gloomy, then the Torah considers it as if he gave nothing.

But one who greets his friend with a pleasant countenance is considered to have given the best gifts in the world, even if he did not actually give any gifts at all.

Ask Great Questions

The questions your circle asks of applicants should, obviously, reflect your members’ interests, priorities, and the particular lenses they bring to their giving. Grantmaking is like matchmaking or applying to college: an applicant may be objectively exceptional, but if they don’t meet your subjective interests and needs, then it’s not a good fit.

Some circles dive deep into the issues the applicants are addressing; others focus intensely on metrics and outcomes; others might orient their giving around meeting the needs of a particular organizational stage of life. Some of the standard questions you might ask include:

1. Does the applicant address a clearly identified and compelling need?
2. Is the applicant’s program model innovative and/or proven? (Which does your circle prefer?)
3. Does the applicant’s leadership (staff and board) seem visionary, and do their backgrounds, qualifications, and/or experience seem suited to the task at hand?
4. Does the applicant have the capacity to implement their plans, with appropriate staff leadership, qualified advisors, and sound financial management?
5. Does the applicant have potential for short-term and long-term impact? Does it have clear and measurable goals, and clear metrics to measure its impact and reach?
6. Does the budget seem reasonable?

7. Who else is supporting this organization/initiative—and how will your circle's support fit into this mix?
8. Rightsize Your Expectations

Be aware of and intentional about all of the things your circle is asking of members, applicants, and grant recipients. Be realistic about how much time you're asking from everyone involved in the process, and about how much your grant money can achieve. How much time can members commit to the process—and how should your application process reflect that? How much time are you asking from organizations to apply for a grant—and is the amount you're offering commensurate with the amount of work that goes into the grant application? And finally: are you expecting specific results from your grant—and are those results achievable within the grant period?

Experiment & Have Fun

Successful giving circles evolve organically over time, reflecting their members' interests, the needs of the field(s) they support, and in response to great ideas and questions that emerge over time. There's no right answer in grantmaking and there's always a period of trial and error when you first start out with your strategy. Smart circles will reflect on their work cycle after cycle and tweak the process, strategy, and focus to respond to their learnings.

And last but not least: remember that grantmaking in a giving circle is a lot of fun, and the work you are doing is important both to your members and your grant recipients. Celebrate the end of your cycle with a party, perhaps inviting your grant recipients to join you.

Jackie Fishman is the Assistant Director of The Natan Fund. She is responsible for overseeing Natan's grants process, researching new grants initiatives, managing internal operations and HR procedures, working with Natan's current membership and is part of the overall strategic visioning for the organization. Prior to Natan, Jackie was a fellow at Insight: The Schusterman Fellowship for Jewish Community, through which she worked at three top Jewish organizations: the Foundation for Jewish Camp, Natan, and Hazon. Jackie was born and raised in New York City. She earned a B.A. in English and Economics from Binghamton University.

PART 5:

Sacred Conversations About Money

By Julie R. Sissman

Questions about money are some of the most profound ethical, spiritual, and values-based questions of our day.

All we have to do is look at the news: President Obama and members of Congress talking about income inequality; investigations into alleged financial improprieties (Sheldon Silver and Bibi Netanyahu are just two examples); online discussions about how we can help our children to be the “opposite of spoiled” (as coined in Ron Lieber’s [new book](#)); Nicholas Kristoff’s [recent discussions](#) of privilege and compassion.

Choices about how we spend our money greet us at every turn—do I take a taxi or the subway today? Do I buy coffee at Starbucks or make a cup at the office? As Jews, we may also wonder about the *tzedakah* we give. Donation requests from our alma maters and various causes enter our inboxes weekly, forcing us to wonder: Is *tzedakah* about fulfilling an obligation to care for those in need? Or an expression of our deepest values? Or do we desire to see some sort of social return on our *tzedakah* “investment”?

We could all benefit from somewhere to ask these questions; grappling with the answers can help us live lives filled with integrity and deeper meaning through the choices we make about money.

The best space I’ve found for these conversations is my Jewish giving circle, [HEKDESH](#), made up of alumni of the [Dorot Fellowship in Israel](#). With HEKDESH, I have the [opportunity](#) to delve into Jewish wisdom, old and new, to gain insights that now make me feel better equipped than ever to navigate this complicated territory.

By discussing topics like how our consumption relates to our *tzedakah*, how generosity of the heart is related to generosity of the wallet, and the “obligation” of every person to give, my own thinking about money and *tzedakah* has been transformed.

Jewish tradition asks: Do you give to those in your city before giving to the needy far away? (Aruch HaShulchan, Yoreh Deah 251:5) Do you give priority to Jews or non-Jews, and why? (The Babylonian Talmud (Gittin 61a) These are important questions that every giving circle—and every *tzedakah* giver—grapples with. Engaging with Jewish wisdom and tradition to inform our decisions enhances our experience of decision-making and provides a powerful connection to Jews who were grappling with the exact same questions centuries ago.

Jewish giving circles don’t only focus on strategic grantmaking. Many also have as part of their missions to affect and change their members—to move young people into a habit of giving, to enable members of all ages to be more intentional and/or generous

with their giving, and to create communities of people who are more comfortable talking about money and giving.

In fact, our tradition offers deep insights on how giving can impact the giver. Maimonides talks about the relative merits of giving; is it better to give \$10 to 100 different causes, or \$1,000 to one? Part of the thinking is based on how each choice would affect the giver. We can also look at the story of the Israelites' exodus from Egypt. Again and again, Pharaoh's heart is "hardened." At HEKDESH, we've asked: Are our own hearts hardened or open, and how does this impact how we give, as well as our broader actions in the world?

As American Jews report feeling more and more disconnected from Jewish life, giving circles also offer an alternative, new, and attractive form of Jewish community. As a space where we can grapple with important questions, Jewish giving circles provide the kinds of connection that Brene Brown describes in *The Gifts of Imperfection*: connection is "the energy that exists between people when they feel seen, heard, and valued; when they can give and receive without judgment; and when they derive sustenance and strength from the relationship." By their nature—collaborative and egalitarian—Jewish giving circles require active listening, humility, and openness to being influenced by others' ideas, which fosters this uniquely deep type of connection.

This unique connection also comes, perhaps ironically, *because* money is so hard to talk about. Talking about it in a safe space with "[trust builders](#)" in place, quickly builds a sense of intimacy and connection. The depth of discussion that then becomes possible is the kind that can motivate people to action—whether that action is giving money or also giving time to a cause that the group has decided is important to them.

For me, being a part of HEKDESH and joining with people who are similarly interested in exploring issues of money, priorities, justice, values, ethics and spirituality through a Jewish lens has been truly life-changing. My personal *tzedakah* is more intentional, I'm committed to giving more, and I feel a greater link with Jews through time and space.

In Jewish tradition, there is no blessing to say when giving *tzedakah*. As part of my experience with HEKDESH, I've created one that attaches deeper spiritual meaning to my *tzedakah* practice; I offer it here so that you can use it, too:

May my tzedakah decisions be thoughtful and intentional. May this tzedakah offering make a positive difference in the world. May I give it with a generosity of spirit and humility. May I find ways, through this tzedakah offering or other activities, to inspire others to also give intentionally and generously. And may my thoughts and actions of tzedakah help me to have more feelings of compassion and loving kindness in all aspects of my life

To help enhance your own *tzedakah* practice, I invite you to check out [Amplifier](#)—a new platform and set of resources to help you join an existing giving circle or start your own. You can also feel free to use our [HEKDESH Tzedakah Learning Series](#) to deepen your individual or collective giving.

May you—and may all of us—find our way to a deeper experience of giving, of connection, and of community.

Julie R. Sissman is an organization and leadership development consultant. She is also a board member and chair of the external relations committee for HEKDESH, the giving circle of alumni of the Dorot Fellowship in Israel. She's gotten "hooked" on giving circles, and, along with her husband, is now also a member of the Natan Fund and the Jewish Women's Foundation of NY.

PART 6:

How Generation Z ‘Shakes Up’ Philanthropy

By Joelle Asaro Berman and Stefanie Zelkind



JTFN Team Surprise

“These kids are savvy, bold, and eager to do good. Like it or not, they’re poised to shake up philanthropy.”

With these words, *The Chronicle of Philanthropy* waved a flag to its readership about the [up-and-coming Generation Z](#) just a couple of weeks ago, but it’s a message that we at the [Jewish Teen Funders Network](#) and [Amplifier](#) already know. Indeed, thousands of teens are getting first-hand experience in philanthropy by participating in Jewish teen foundations—essentially, Jewish giving circles tailor-made for teens.

The field of Jewish teen philanthropy has grown exponentially over the last decade, with [nearly 100 Jewish teen foundations](#) in operation today (and more in the works). These foundations—run by Jewish federations, community foundations, synagogues, schools, JCCs and summer camps—invite and encourage teens to explore issues they care about ... and then get involved.

Here's how it works: A group of about 20 teens, post-*bar/bat mitzvah*, come together as a “teen foundation board.” They create a mission statement based on their shared values and priorities, and then set out on a philanthropic journey together. They learn about the nonprofit sector and the grantmaking process; they read grant proposals and go on site visits to organizations seeking support. They grapple with big questions like, “What does Jewish giving mean?” and “What’s the change we want to make in the world with our giving?” They decide together which organizations they want to fund with their shared grantmaking pool, which is comprised of their own contributions, money



Camp Philanthropy

they raised from family and friends, and/or grants from local funders. Guided by Jewish values and peer-to-peer discussions, teens work through consensus to arrive at their final grantmaking decisions.

We believe that Jewish teen foundations are so compelling because they speak to the interests and strengths of this generation (born starting in the mid-90s to the early ‘00s):

- Gen Z is socially aware and wants to “do good.” New data gathered by the marketing firm Deep Focus found that 20 percent of children and teenagers want to start a charity in their lifetimes. Social-media guru Beth Kanter dubbed them “PhilanthroKids,” observing the ways teens apply their technical

and social-media skills to support charitable causes. Jewish teen foundations tap into this mindset and skillset, providing a meaningful, smart, and gratifying way to give.

- Teens are ready to build on very early experience with philanthropy. From dropping coins in the *tzedakah* box to sponsoring a relative's participation in a fundraising event, from baking for a school bake sale to raising money through an online crowdsourcing platform, most teens involved in Jewish teen foundations have already been introduced to the concept of money as a key ingredient when creating social change. Jewish teen foundations allow for a deeper dive into an exploration of the nonprofit sector, the essential role of philanthropic dollars, and the many questions and considerations that go into making funding decisions. And through their participation in a real grantmaking process, teens enjoy a rare—and eagerly welcomed—opportunity to take on real responsibilities and drive major decisions.
- Teens want to be with their friends. Many participants in Jewish teen foundations worked on a philanthropic *bar/bat mitzvah* project, an individual project created around a teen's interest areas. Now in high school, teens have a special opportunity to join with their friends and peers to engage in a project as a group. In addition to pooling their dollars and leveraging their financial impact, teens enjoy being part of a group of fellow leaders, givers, and doers. The group experience is social and educational, and creates a sense of community that teens crave.

JTFN has known for years that the early experience of collective giving through a Jewish teen foundation is just the beginning of what we hope will be a lifetime of giving through Jewish values. Now, this hope is much closer to becoming a reality: Amplifier provides a natural pipeline to the “grown-up” universe of Jewish giving circles.

Of course, many of the reasons we listed above for Jewish teen foundations' appeal to Generation Z are the same reasons why people of all ages are joining and starting their own giving circles. Circles provide an empowered, social experience of philanthropy that can evolve as teens grow up, form new communities, and explore new interests.

Teens who have served on a Jewish teen foundation board are natural candidates to launch new giving circles in their adult years: on their college campuses, within their Hillels, with their Birthright Israel busmates, with their sorority sisters, or with their fellow teen foundation graduates as a self-directed alumni program. In doing so, teens can build upon their teen foundation experiences, apply the skills they learned, and exercise leadership in a new way throughout their lives. And now that they'll be running circles themselves, Amplifier's tools and network can help them to take charge of their own collective giving experiences.

Amplifier's [online platform](#) serves as a “one stop shop” for teen foundation alumni as

they transition from participating in a staff-supported foundation to a peer-led giving circle, providing educational and grantmaking resources and a ready-made docket of grant proposals from many of the 380 organizations listed in its [directory](#). Perhaps most importantly, Amplifier welcomes teen philanthropists into a [growing universe](#) of Jewish giving circle members—people who, at all ages and stages, have come to recognize the power of collective giving through a Jewish lens.

And here, it is our shared hope that teens will not only learn, but contribute to—and even lead—this growing movement.

Joelle Asaro Berman is responsible for overseeing the Natan Fund’s Amplifier program, a global network of giving circles motivated by Jewish values and inspired by changemakers who are making a difference around the world. Joelle can be reached at joelle@natan.org or on Twitter: [@joelleab](https://twitter.com/joelleab).

Stefanie Zelkind is the founding director of the Jewish Teen Funders Network, a central resource for the growing field of Jewish teen philanthropy. She got her first taste of a collective giving as a co-founder and participant of “No Small Change: A Tzedakah Collective for Women and Girls.” Stefanie can be reached at stefanie@jtfn.org.

PART 7:

Your Organization's Best New Asset: A Giving Circle

By Joelle Asaro Berman

“Giving circle.” What does that term mean to you? What is your immediate reaction to it?

As an organization professional, it's possible that giving circles are new to your world, a mysterious undertaking with unclear benefits and risks. They may sound like a fundraising gimmick – just a different way to think about donor giving levels. At worst, you may fear that giving circles will siphon off money that may have instead funded your organization or its annual campaign.

Let us put you at ease.

Giving circles can be your organization's best new asset. They are a highly malleable, customizable tool for creating a culture of giving in your organization. They can also help you achieve many of your organization's goals in a meaningful way that will leave your members feeling transformed and deeply committed to your mission.

Here's how:

1. With giving circles, you're prioritizing the education, networking, and engagement of your audience. This pays off in a multitude of ways – some of which are financial.

Giving circles enable you to offer a new kind of value to your stakeholders: an opportunity for your audience to deeply encounter the issues at the core of your work. With a giving circle, your organization can provide a new kind of educational experience around your mission, an understanding of the challenges facing your field and what's needed to make real impact. Members emerge more deeply committed to your mission, and become invested ambassadors for your organization.

For example, the Jewish Community Federation and Endowment Fund (JCF) of San Francisco created a [giving circle](#) to generate additional funding for one of its focus areas in Israel, while also encouraging members to contribute to the Federation's annual campaign. Throughout the giving circle's process, the Federation provided circle members—young couples with a desire to learn more about Israel, but little knowledge of Israel's social issues—with data on unemployment, education, and underserved populations. Circle members learned about how the Federation evaluates potential grantees, but ultimately made their own funding decisions.

This project required an investment of staff time from the Federation; it also catalyzed \$24,000 in new funding for the kinds of organizations that the Federation cares about (with an emphasis on the Federation's existing grantees), as well as a couple of dozen



JCF Israel Giving Circle

new stakeholders who now have a much deeper understanding of how Federation works and what it supports.

Sigalit Rubinson, the Israel and global program officer at JCF who staffed the circle, summarizes the impact: “Our Federation’s experience bears out that giving circles are helpful tools for communal connection and heightening awareness of key issues. This experience deepened our members’ relationships through discussions on shared values and love for Israel. Giving circles embody education with action, and reward participants with doing good together.”

By staffing or hosting a giving circle, your organization can also leverage the multi-touch engagement of the experience, building a deep sense of community between your audience members. Strengthening these bonds between members within your organizational framework will also bring members much closer to your work.

“This past year, our giving circle experimented with our first co-deliberation between American and Israeli alumni leaders,” shares Naamah Paley, who runs the [Alumni Venture Fund](#), a giving circle for alumni of the Bronfman Fellowship program. “This allowed us to use our giving circle as a mechanism to foster dialogue and build bridges between our communities, which is a critical part of our the Bronfman Fellowship’s mission.”



Bronfman Youth Fellows Alumni Advisory Board discusses the Alumni Venture Fund giving circle.

Giving circles also empower people to enter Jewish conversations, tackling discussions about Jewish values, communal issues, and their visions for the Jewish people and the world. It's a deeply powerful, meaning-making experience, and your organization is providing it.

“Our giving circle has created a sacred space for our members to come together to grapple with their individual and collective charitable interests and priorities,” shares Jami Bachrad, IKAR’s development director. “By learning together about a variety of causes and opportunities for giving, participants’ connections to our own IKAR community as well as to the greater community are deepened simultaneously.”

These efforts pay off. They build your brand as giving circle members spread the word of their experience. And [research](#) shows that giving circle members not only give more, but are more likely to join boards, donate expertise, and get their friends involved.

2. Giving circles also make it possible, in some cases, to fundraise for programs and projects within your organization.

At the JCC of Manhattan, a group of parents with young children in the JCC’s preschool wanted a way to stay in touch once their children aged out of the program. The JCC formed a giving circle, [Atid](#), that enabled the group to continue to connect with each other within the context of the JCC, and to learn about (and then fund) some of the JCC’s many programs and services. Atid members allocate the circle’s funds to the JCC programs that they feel most resonate with their collective philanthropic values.



Challah for Hunger students selling challah

“Atid members have the opportunity to connect to the JCC in an elevated and meaningful way, gaining greater insight into our institution,” says Joy Levitt, CEO of the JCC of Manhattan. “The members have built a cohesive community while making an impact on critical program needs. They have also leveraged their gifts into a significant grant pool and provide funding where it is needed most.”

Some giving circles, like the Bronfman Fellowship’s Alumni Venture Fund, exist exclusively to support the entrepreneurial projects of program alumni. Giving circle members – also Fellowship alumni – learn about the important work that their fellow alumni are doing across the world and choose which projects to support.

“Our Alumni Venture Fund benefits the Bronfman Fellowships and our alumni community in a wide range of ways,” says Paley. “We’re able to engage alumni as funders, grantmakers and grantees; and we can further the ideals of our organization through distributing alumni funds to support projects that align with our values.”

The giving circle model is flexible; design it with your organization's needs, mission, and audience in mind, and it will help you accomplish a wide range of strategic goals.

3. Giving circles will make you a smarter fundraiser, and they create a stronger culture of philanthropy in the broader Jewish community.

By hosting a giving circle, your organization is training members to become more intentional, thoughtful givers. The result is both narrow and broad: you gain deep knowledge on your members' giving preferences, enabling you to sharpen your fundraising strategy, and the community as a whole benefits from having more – and more thoughtful – givers.

“Hosting giving circles have given me great insight as I fundraise for Challah for Hunger,” says Carly Zimmerman, CEO of Challah for Hunger, who hosts a [giving circle](#) for alumni. “During the giving circles, students and alumni speak frankly about ‘why’ and ‘how’ they give, and these experiences have immeasurably informed my work as a fundraiser.”

By creating a space where members can reflect on their giving, you can help them connect their giving preferences to new kinds of philanthropic activity. Even if the circle's money doesn't support your organization, it's still good for the Jewish people – and good for humanity – for all of us to create more thoughtful, intentional, collaborative givers. You may be starting people on a philanthropic journey that initially aligns with your organization's mission, but ultimately, a rising tide lifts all boats: hosting or facilitating giving circles is an investment in the Jewish philanthropic future.

The more we can provide the incredibly meaningful experience of collective giving to people who are inspired by Jewish values, the broader and more lasting the impact on the Jewish community and the world will be.

If you would like to explore what a giving circle could look like at your organization, we'd love to help. Check out this [resource](#) for a deeper dive on hosting a giving circle, and email us at Hello@AmplifierGiving.org when you're ready to get started.

Joelle Asaro Berman is responsible for overseeing the Natan Fund's Amplifier program, a global network of giving circles motivated by Jewish values and inspired by changemakers who are making a difference around the world. Joelle can be reached at joelle@natan.org or on Twitter: [@joelleab](https://twitter.com/joelleab).



www.AmplifierGiving.org

Hello@AmplifierGiving.org

212 764 8989