

GETTING STARTED WITH A GIVING CIRCLE

The Basics

The total time commitment spent on a giving circle will vary, depending on how often you and your members meet, the types of education and engagement you do, and how much additional fundraising you do (if any). The initial set up of your circle can be completed quickly with a smaller, 'start-up' crew or could require more time if you decide to recruit members and include everyone in the process. How you organize your set up is up to you! Below are the steps we encourage you to take when starting a giving circle.

ADMINISTRATION

- Decide **who the leads of your circle will be**. They will take on administration duties, organize meetings and be the main contacts for others looking to join your giving circle. We recommend having two people, at minimum, to share administration responsibilities and to aid the sustainability of your giving circle in the long term. These representatives can change on a schedule as decided by the group if you would like to share responsibilities in this way.
- Decide on your **time commitment**. The amount of time required will depend on how quickly you can align on your mission and goals, how many times the members meet, and what type of engagement you do. For example, will you conduct meetings by email or over the phone or in-person? Will you host an annual event?
- Choose a **name for your giving circle**. Often giving circle names will reflect member identity and goals. Examples include the [416 Cares](#), "[Social Venture Partners](#)" or "[Amplifier Giving](#)".

MISSION, VISION AND GOALS

- Decide on your **mission and vision**. What do you stand for? What do you want to achieve? Set some **goals** for your circle.
- What issues do you want to affect change in with your giving? Review [Toronto's Vital Sign's Report](#) for inspiration. If your group is interested in the advancement of gender equity, discuss what that looks like - do you want to support girls, young women or mid-career women? Access to housing for low-income mothers? Tackle the prevalence of domestic violence? Help reduce isolation for senior LGBTQ women? Think about what you want to achieve and then be as detailed as possible to make sure you are aligned on your focus.

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MEMBERSHIP

- **Decide how many people you want as members of your giving circle and whether you are open to increasing that number with new members.** You can start with as few as two people and aim to grow your circle every year. When thinking about your ideal membership size, consider what you identified as your main priorities and goals. For example, with more people, you increase the total financial contribution and your potential impact. However, more people demand more time from you, concerning administration, it can be harder to come to consensus and it can be more difficult to create an intimate learning setting with a large group.
- The smaller the group, the greater the closeness between the members - some giving circles have purposefully decided to stay at 10 members or less to **increase the opportunity for deep learning and engagement with each other**, and to make it easier to coordinate times to meet in person.
- Generally, you may wish to **start with a small committee** to get your circle underway and understand that it can take time to get it established.
- Decide **on the composition** of your giving circle.
 - Decide whether there are **values** that you want for your giving circle and whether members have to espouse those values (e.g. commitment and willingness to learn).
 - Decide **how often you will meet** and **what types of meetings** you will have. In the beginning, you will likely need to meet several times to align on your mission, vision and goals. You will also have to determine what method works best for your group - in person, over the phone, online, etc.
 - Is it possible to involve people who have **lived experience** with the issue you hope to address by periodically requesting site visits at charities and meeting a volunteer or a program recipient who can speak to your group?

MAKING GRANTS

- **Take time to establish the grant-making process.** What happens when members disagree on a decision, when a grantee fails to meet expectations, or when members' interests shift over time? Setting up parameters for dealing with such challenges in advance can promote group cohesion and effectiveness.
- **Agree on the funding commitment.** Will you each give 100% of the Available to Grant (ATG) from your funds every year? Will you consider multi-year funding? Will you decide on a set amount that is the same for all members? Will the amount be large or small? Will you also fundraise? Chat with your contact at Toronto Foundation to discuss how distribution of your grants will work.

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- **Determine how decisions will be made.** Some giving circles use voting, while others use consensus-based decision-making. Determine a process that works best for your group.
- **Use a resource** such as the [Good to Give Guide](#) to identify organizations working on the issues you care about in the Greater Toronto Area. The benefits of using the Good to Give Guide are 1) these organizations have been vetted by Toronto Foundation, and 2) you can find organizations that you may not know about, but are high-impact and doing critical work on in communities across Toronto.

FOR YOUR CONSIDERATION

Once you have established the basics (above), consider some of the ideas below for enhancing your experience.

- It will be useful to learn about and **engage with the community** you are hoping to impact, to better understand issues and, inform your goals and mission. This can include holding and attending workshops, experiencing group coaching, and hosting and attending events and site visits with community leaders.
- **Engage with other members of giving circles** to learn what works well and what hasn't. Toronto Foundation can connect you with others who have started giving circles at the foundation.
- Make sure to **engage with your own giving circle members and provide social and networking opportunities.** The more involved members are, the more likely they are to continue to participate.
- **Celebrate!** Consider getting together once a year to recognize what you have accomplished. You can meet in person at a member's house, or you can host an event somewhere in the city that is accessible to your members.



Fundholders meeting leaders from non-profits in the GTA during a Toronto Foundation networking event.

Review our section on **Best Practices for Giving Circles** to learn tips for starting and growing giving circles.