



Philanthropy
Together

Democratizing and Diversifying Philanthropy Through the Power of Giving Circles

March 2024

Hello! I'm
Sara Lomelin

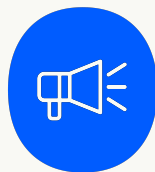
*CEO of Philanthropy
Together*



Philanthropy Together is a global initiative on a mission to **democratize and diversify philanthropy** through the power of collective giving.

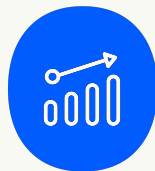


What we do...



Showcase

Change the narrative of who is considered a philanthropist and how we give



Scale

Encourage the growth and participation in collective giving - giving circles, collaboratives, etc.



Strengthen

Shift practices of existing collectives to be more connected, equitable, and rooted in trust



Sustain

Elevate the need for infrastructure to support a long-term, vibrant field

LOVE OF HUMANITY



"Giving by,
for, and with the
communities we
represent is the
future of
philanthropy"

There are countless models of collective giving!

Social
Change
Giving
Circles

Event-
Based
Giving
Circles

SVPs

Giving
Projects

Investment
Circles

Political
Giving
Circles

Women's
Funds

ERG /
Company
Giving
Circles

Flow
Funding
Circles

Pop-Up
Giving
Circles

Donor
Collaboratives

Community-
Led
Collaboratives

Fundraising
Circles

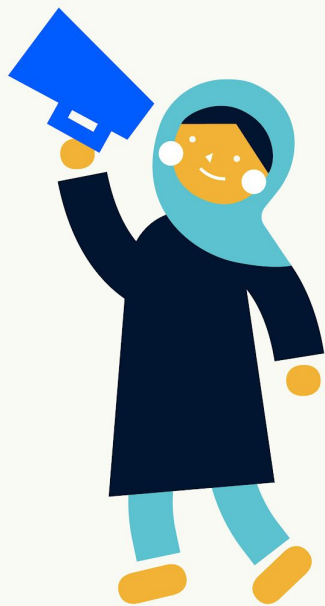
University /
Alumni
Circles

Giving
Tuesday
Community
Campaigns

Donor
Network
Pooled
Giving

Mutual Aid
Societies

WHAT IS A GIVING CIRCLE?



A giving circle takes your **mind, talents and financial abilities** seriously, and makes giving a **collaborative, social experience.**

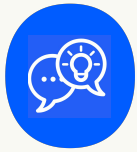
They create caring, generous communities of people who **act intentionally, thoughtfully, and strategically** — together.



¹ BELONGING

A group
with shared
values
gathers &
builds
community
& creates
belonging.





²
DISCOURSE

They discuss
a common
vision, and
engage in
discourse
and learning.

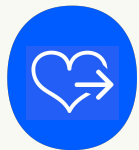




³
TRUST

They decide together where to give their money, time, and talent— and give with **trust** at the root.





4

ABUNDANCE

They act in **abundance** and engage beyond their gift for amplified impact.



GIVING CIRCLES NEED TO BE *EXPERIENCED* TO BE FULLY UNDERSTOOD—JOIN A MEETING TO SEE YOURSELF!

LEARNING



BOOK CLUB

TEAMWORK



SPORTS TEAM

FUN!



DINNER PARTY

IMPACT



CAMPAIGN

Giving Circles as a Powerful Solution

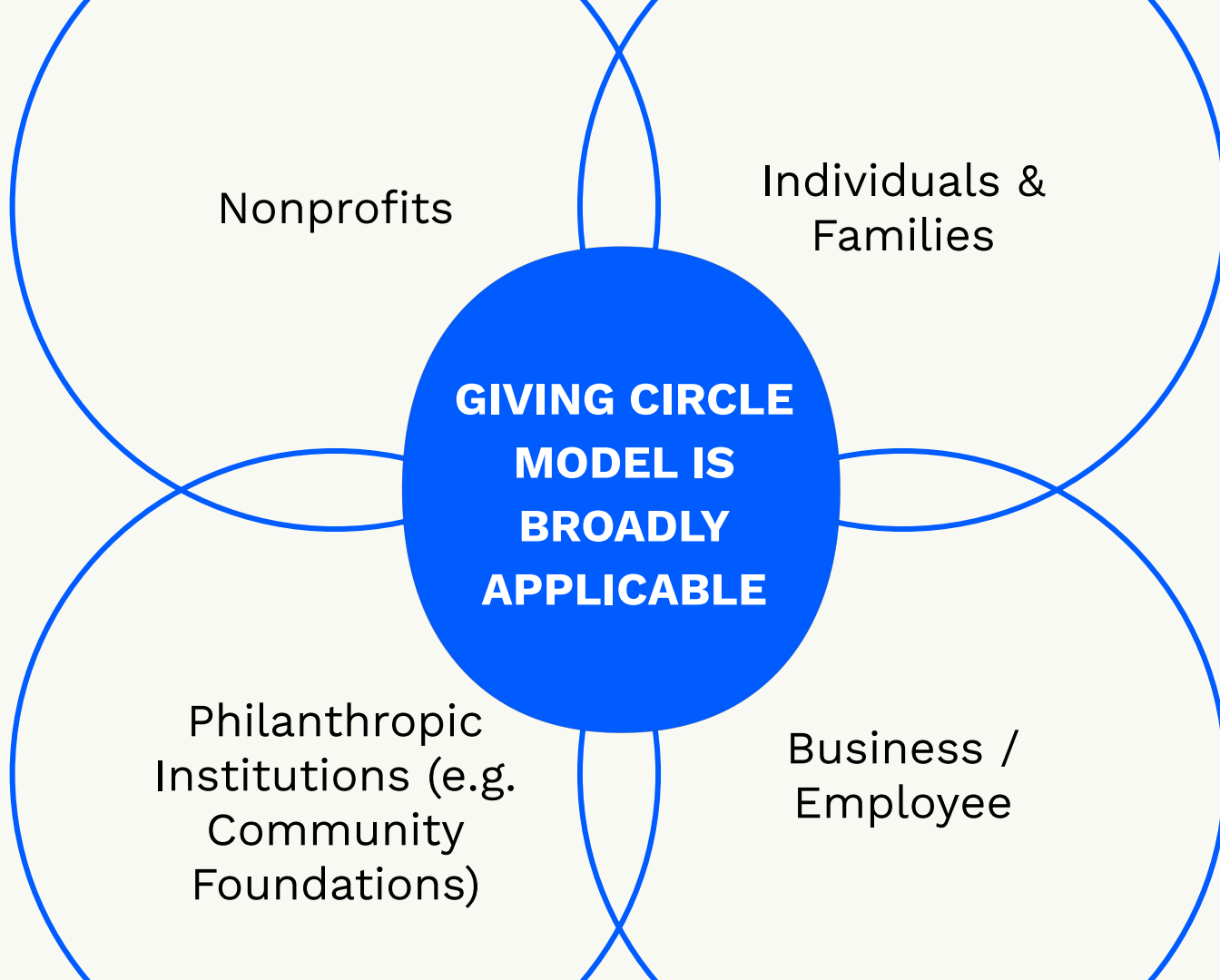


WHO IS INCLUDED

HOW DECISIONS ARE MADE

WHAT GETS FUNDED





Nonprofits

Individuals &
Families

**GIVING CIRCLE
MODEL IS
BROADLY
APPLICABLE**

Philanthropic
Institutions (e.g.
Community
Foundations)

Business /
Employee

WEALTH CONCENTRATION

115,000+ private foundations and DAFs hold \$1.1 trillion in assets. Yet only about \$66 billion reach nonprofits each year.

ISOLATION

American adults who say they're lonely has doubled to 40%, impacting long-term health outcomes and cognitive function

MISSING VOICES

Donors of color are more likely to donate through more "informal" channels than through mainstream nonprofit institutions and are often excluded from the overall landscape of philanthropy

ANONYMITY

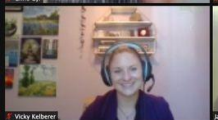
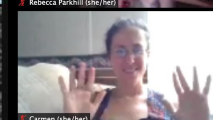
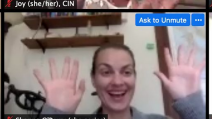
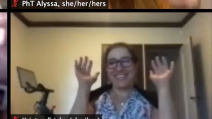
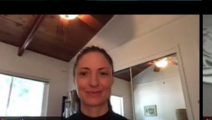
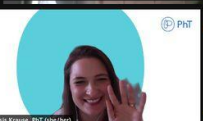
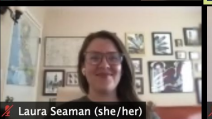
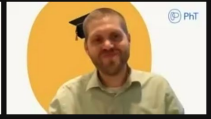
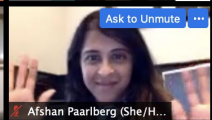
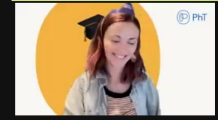
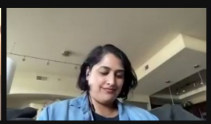
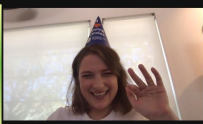
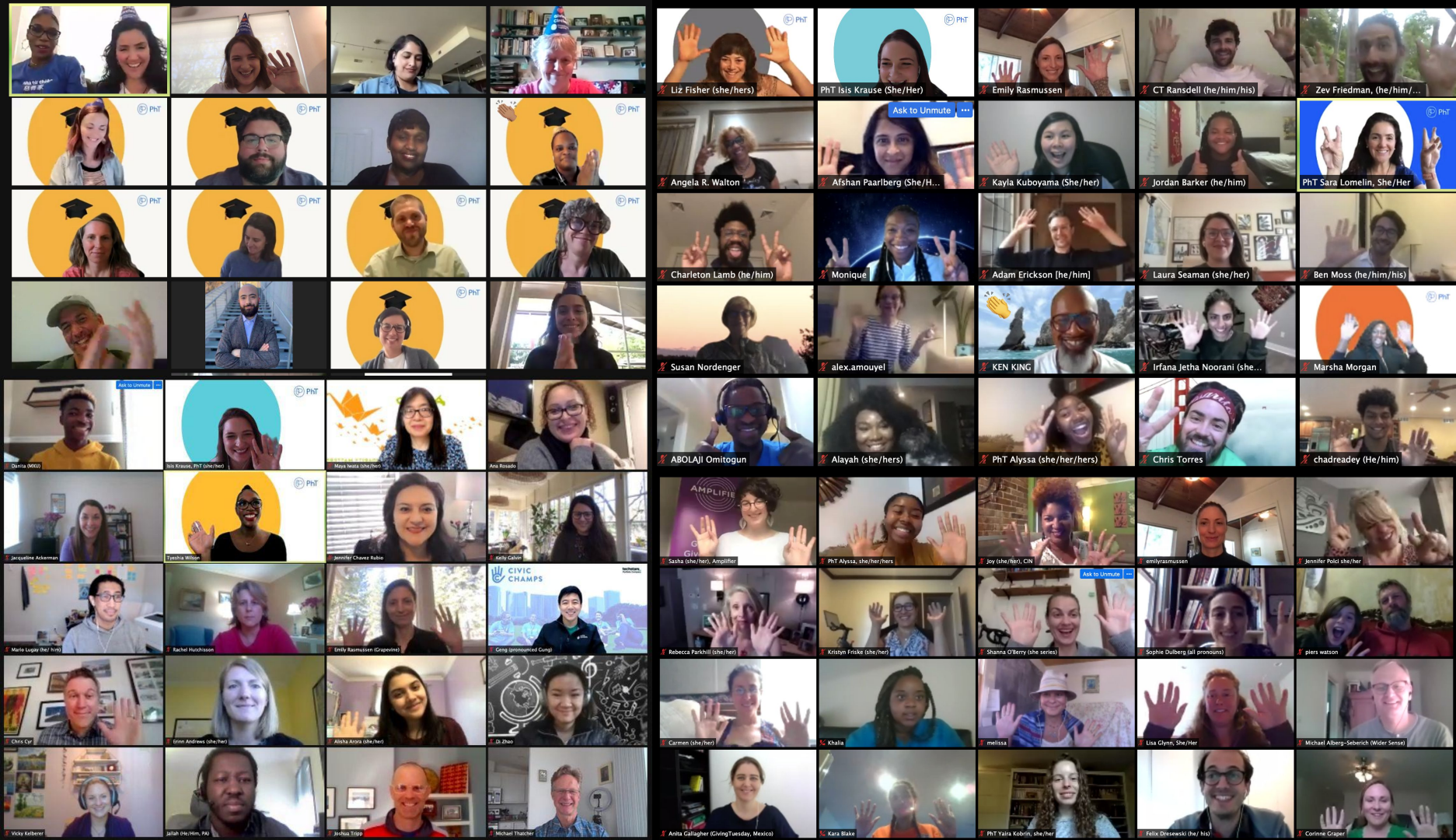
Giving is trending digital, but there is a crucial challenge to ensure that those gifts continue and are rooted in community.

POLARIZATION

Community, political, and familial polarization is impacting health and stress levels, damaging trust in institutions and increasing violence.

MISSING DATA

Grassroots and informal giving isn't as easily tracked or recognized within current dynamics, and giving continues to concentrate in the hands of the ultra rich.



Giving Circles participants are...



**WEALTH
CONCENTRATION**
TO
**WEALTH
ABUNDANCE**

ISOLATION
TO
COMMUNITY

**MISSING
VOICES**
TO
**REPRESENTATIVE
PHILANTHROPY**

ANONYMITY
TO
ACCOUNTABILITY

POLARIZATION
TO
SHARED VALUES

MISSING DATA
TO
**AGGREGATED
IMPACT**

Collective giving is powerful....

Change the philanthropic sector to Take back power from the few to the many

Shift mindsets about who is a philanthropist—especially those historically excluded in this sector

Move resources to issues areas that are so chronically underfunded

Shift power dynamics between giver and receiver

Move resources to Black, Indigenous, and People of Color organizations, leaders, and movements

TIME
(VOLUNTEERING)

The “5Ts”: Think
of *giving*
expansively!

TALENT
(SHARING
SKILLS)

TESTIMONY
(SUPPORTING
WITH YOUR
VOICE/NAME)

TREASURE
(DONATING
MONEY)

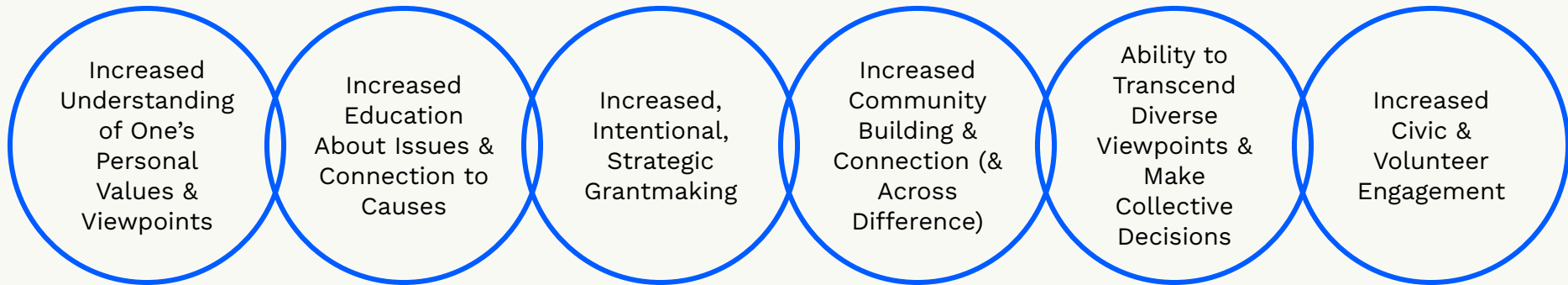
TIES
(MAKING
CONNECTIONS)

Theory of Change for the Giving Circle / Collective Giving Approach

Giving circles are infinitely customizable, but at the core most offer participants the chance to:



For individual participants, this leads to a multi-faceted set of impact outcomes:



For society writ large, collective giving outcomes create a movement of:



The Growing Movement

SUK

(Martinique)

TANDA

(Mexico)

SOL

(Haiti)

IDER

(Eritrea)

SOU SOU / SUSU

(W. Africa, Caribbean)

MAHABER

(Eritrea)

TAM

GEH

(Korea)

ARISON

(Indonesia)

TAM

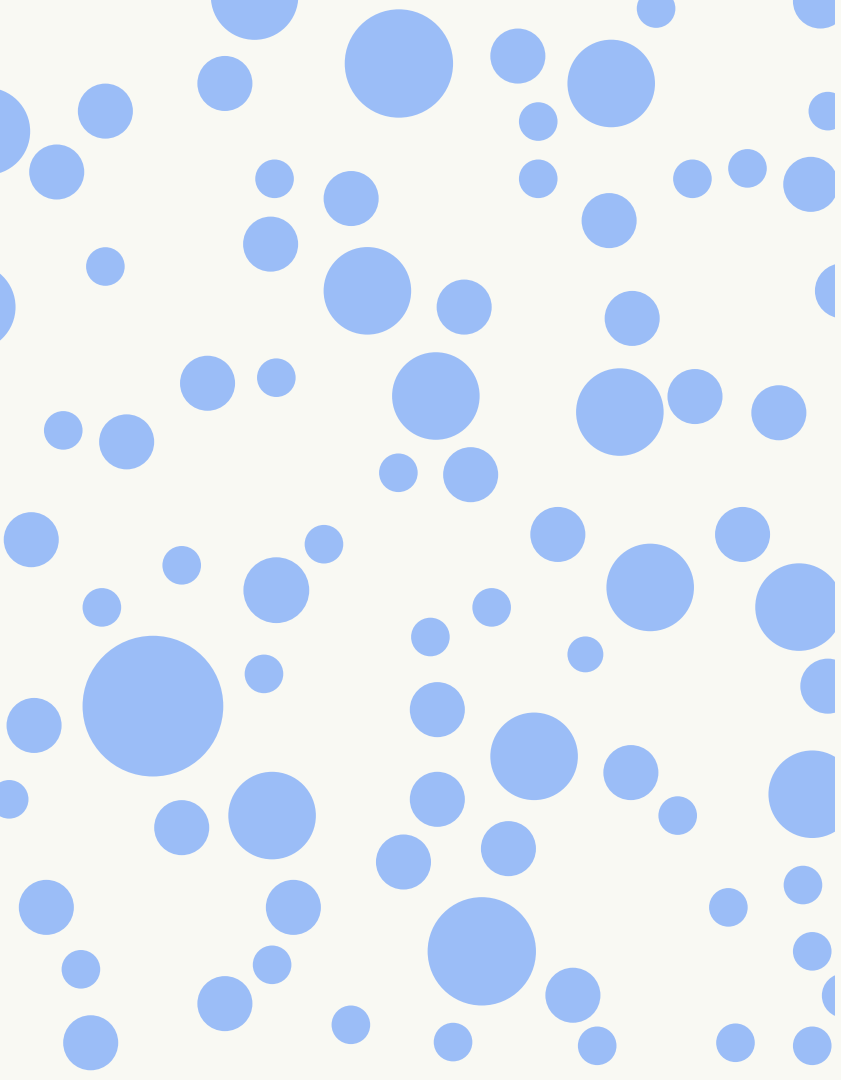
(W. Africa, Caribbean)

POTLATCH

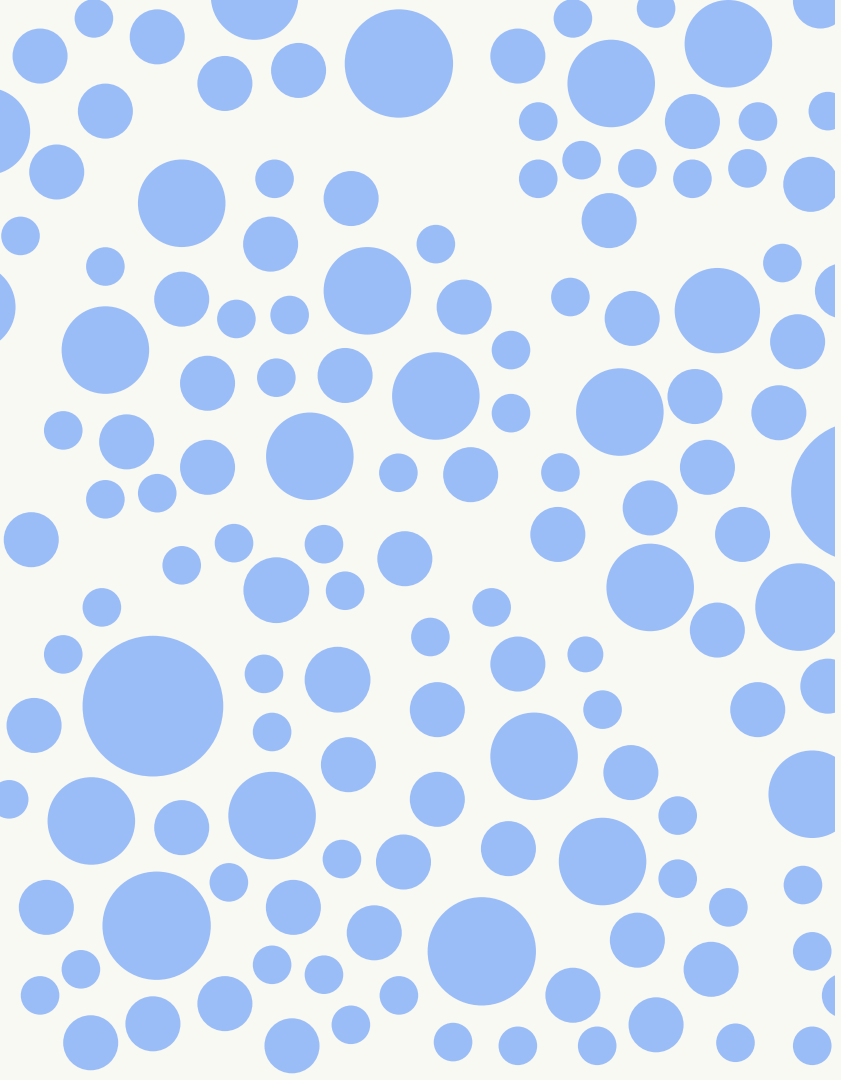
(NW Native American)

E-SO-SO

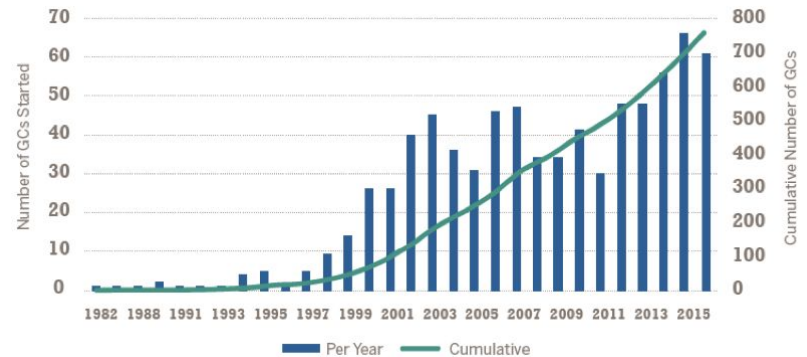
(Nigeria)

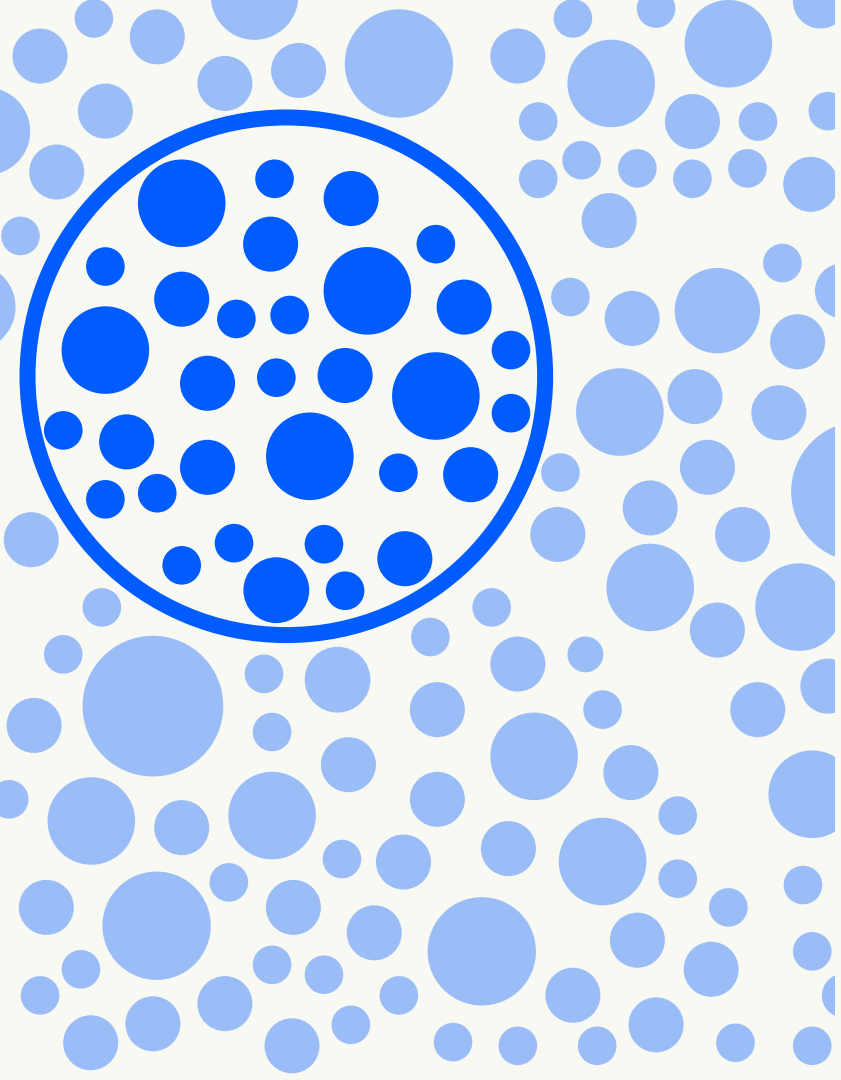


The collective giving
movement in the U.S.
began in the early 80's...

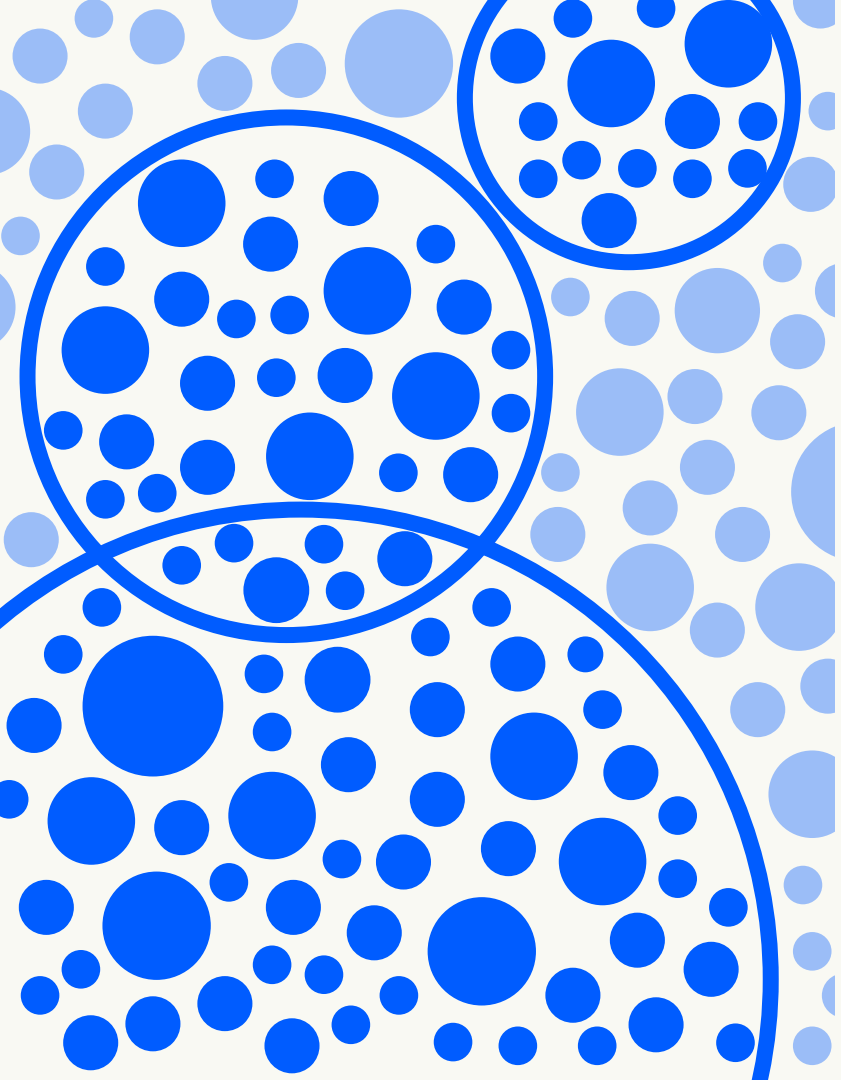


... and the last decade saw a tripling of circles — to over **1,600** circles upon last count.



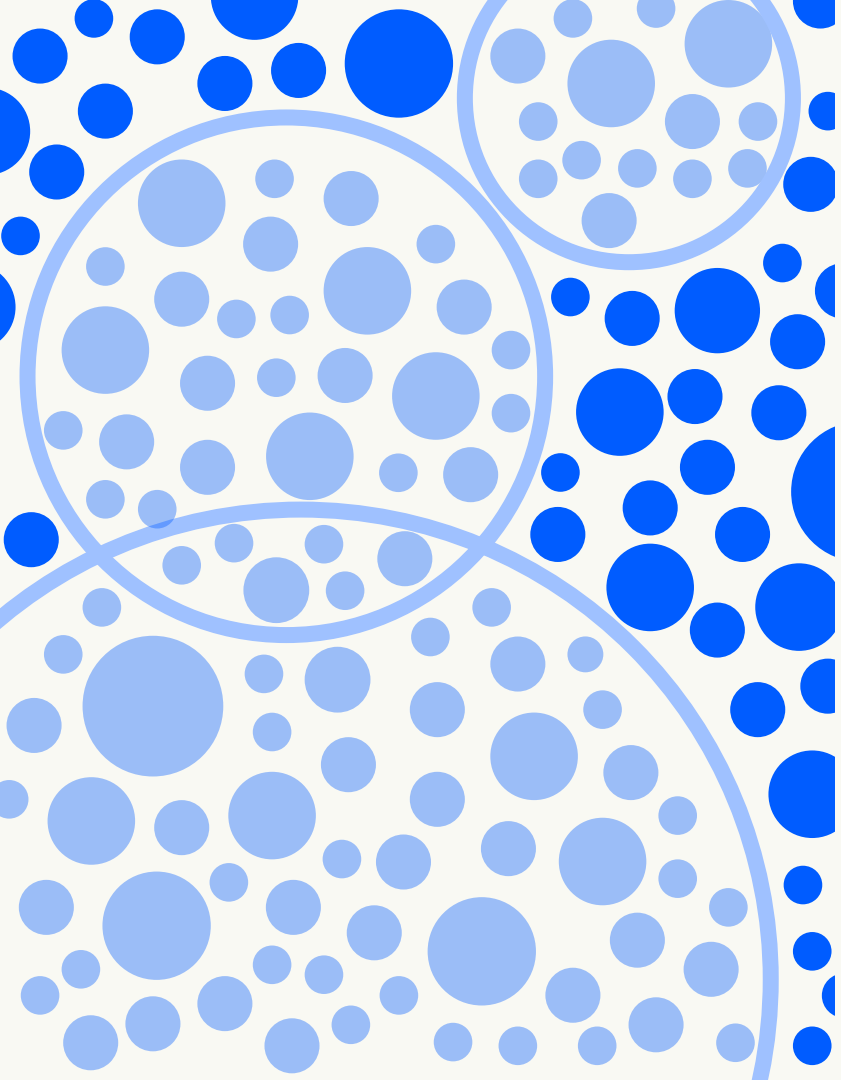


Networks of giving circles with a common affinity began to form to provide resources and connection

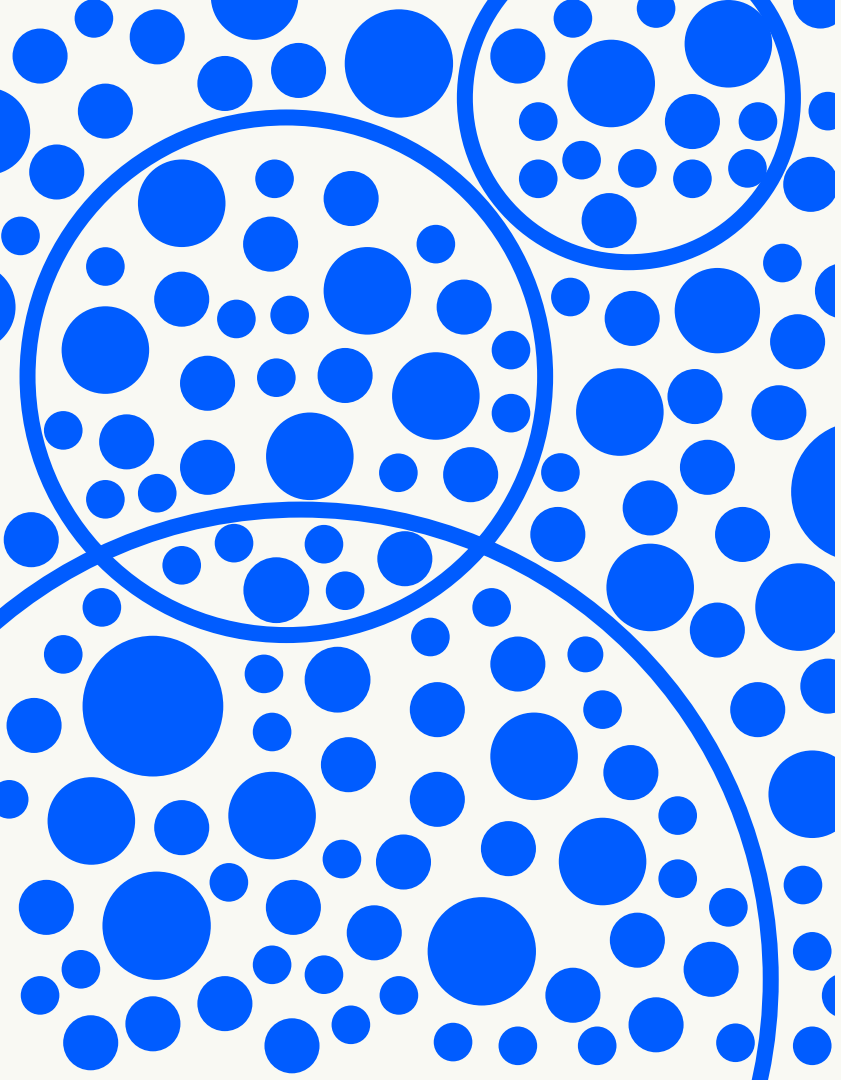


More than a **dozen networks** exist today, with some giving circles in multiple networks:

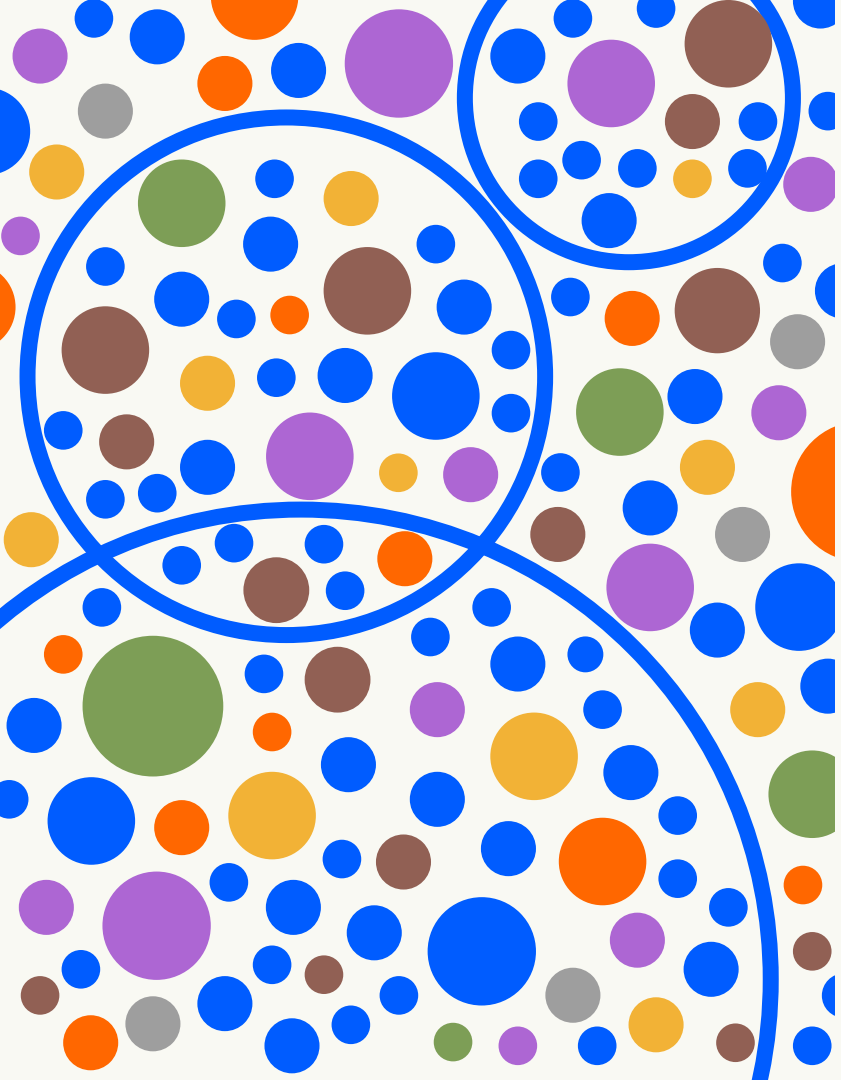
- Women
- Race/Ethnicity
- Youth
- Faith
- Cross-Race / Cross-Class
- Specific circle model



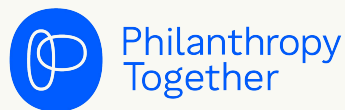
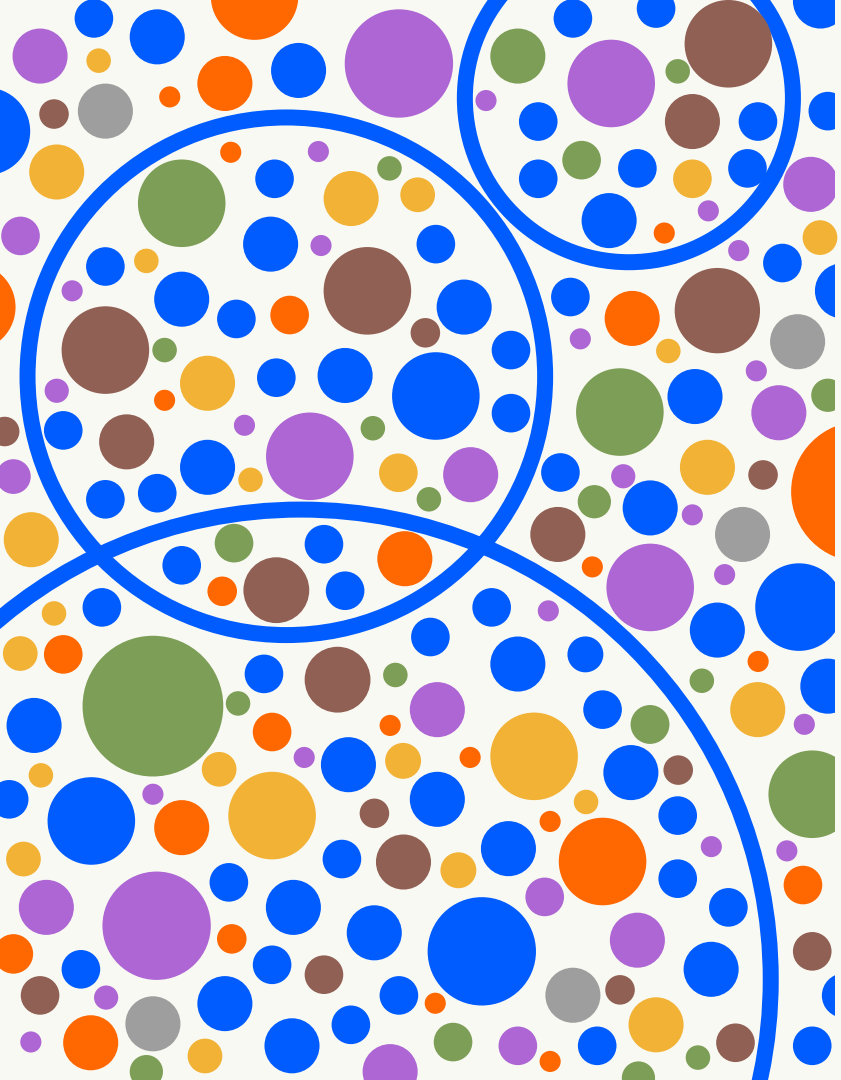
And hundreds more giving circles exist across the country beyond these networks, and more are starting every day.



All together over the past two decades, American giving circles have engaged at least **150,000 people** and given away as much as **\$1.29 billion** as reported in 2016.



And new circles started in the last five years are more diverse than ever before. And the movement has gone global!



Philanthropy Together launched to propel the giving circle movement globally: training hundreds of giving circle leaders and helping existing ones thrive.

NVPC Giving Circle Pilot



- 7 circles have been set up as of Jan 2024.
- Giving Circle members have pledged to support the families with both **financial** and **social** support for at least 6 months.
- Circle members volunteer with the families through befriending, reading sessions with kids, job mentoring and providing transportation.



WOMEN'S ENVIRONMENTAL
LEADERSHIP AUSTRALIA

Women's Environmental Leadership Australia

- Founded in 2016, focused on women leadership development and environmental advocacy and climate action
- Individual members give \$20 per week or \$1,000 per year
- 50% of money is granted to a variety of women and gender-diverse orgs and 50% to support WELA's leadership programs



[Watch Video Spotlight on YouTube](#)



Latino Community Foundation

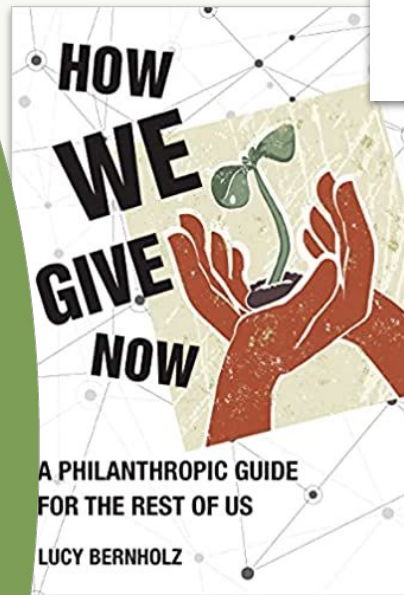
- 20+ giving circle across California
- 151 Latino-led nonprofits supported
- 1000+ member mobilized in 10 years
- Almost \$3M moved by circle members

What does collective giving research say about its ability to democratize philanthropy?

- Groups serve as democratic labs to learn and practice democratic skill sets that we then bring with us into our communities.
- Groups can engage marginalized voices by providing a place where bonding social capital can bloom.
- Groups can bridge together people with different identities and lived experiences in solidarity giving.
- Groups move money to communities that are underfunded, increasing their ability to impact their communities.
- Groups increase the visibility of communities and organizations that are invisible to traditional forms of philanthropy.

What we're
seeing around
the world...

Grassroots giving collectives and movements are gaining mainstream and institutional attention



Monitor Institute
by Deloitte.



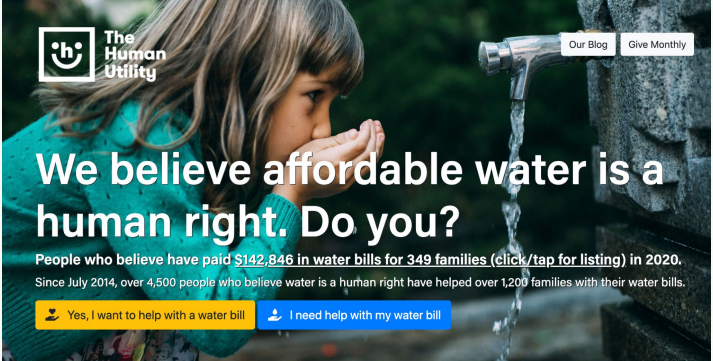
What's Next for Philanthropy in the 2020s
Seeing Philanthropy in a New Light

Gabriel Kasper, Justin Marcoux, Jennifer Holk, and Jeff Morshed



*Council on
Foundation's 2020
report on shifting philanthropic
practice names devolving and
diversifying decision-making
power as key.*

Individuals are taking action where they see enormous need and developing collective solutions with trust at the root.



The Human Utility Our Blog Give Monthly

We believe affordable water is a human right. Do you?

People who believe have paid \$142,846 in water bills for 349 families (click/tap for listing) in 2020. Since July 2014, over 4,500 people who believe water is a human right have helped over 1,200 families with their water bills.


[Yes, I want to help with a water bill](#) [I need help with my water bill](#)

**Grantmaking,
Simplified.**

**Welcome to JustFund,
the only nonprofit
grantmaking solution
that helps move money
more quickly through
an equity-centered
grantmaking process.**



**Let's JustFund,
Together.**



GIVING GAP/

Doing Good means to advance social equity in giving and mobilize people in action for Black lives by connecting people to causes they care about.

1 million people.
1 billion dollars.
Together we can #ChangeTheGivingGap.

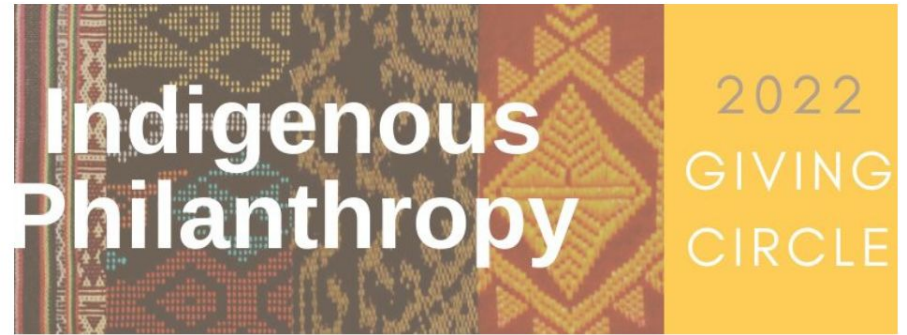
I see doing the good for
@GIVINGGAP

The global movement is growing—new ecosystems of giving circles and collaboratives forming



Many more
diverse giving
circles are
starting

2022 Indigenous Philanthropy Giving Circle



[Home](#)

[Join this Grapevine](#)

Purpose, Composition,
Governance, Giving,
Impact

Why start a
giving circle?

How do
you define
the focus
of a giving
circle?

Giving to those overlooked by traditional philanthropy

Having fun!

Engaging with others of similar identity

Learning more about ideas & issues

Understanding more about the field of philanthropy

Gathering with friends, making new friends

Creating a community of your own making

Being more intentional and strategic in your giving

Making systemic change

Developing your own leadership, facilitation, experience

Making a difference on something you care about

Building and sharing power

Having a conversation about values and beliefs

Increased public visibility in the local community

Increased new donors

Gaining powerful ambassadors in the local community

Stronger relationships with or among our existing donors

Increased leadership and grantmaking for a specific issue/ cause area

Increased understanding by community members of an issue/cause area

Expanded knowledge of grassroots organizations

Increased grantmaking in local community

Positive long-term hosting relationship with giving circles

Increased civic engagement / leadership by giving circle members

Leadership & board bought into strategy of giving circles

Impact evaluation outcomes that align with internal impact goals

Conversations about values and equity are advanced

Values & Focus

Values

- Justice / Equity
- Love / Kindness
- Sustainability
- Community
- Transparency

Issue / Content Areas

- Aligned with the lived experiences of your membership
- Issues your membership care deeply about
- Hyper-specific or broad

Membership / Population Focus

- Ages
- Faith backgrounds
- Abilities
- LGBTQ+
- Gender affinity
- Racial/ethnic affinity
- Socioeconomic status
- Specific professions
- Other communities

Geographic Scope

- Local neighborhood, city, town; stronger knowledge of needs by community members
- County or State
- Country or International

How big will
the giving
circle be?

How much
will
members
contribute?

How big do you hope to grow the giving circle? (Based on your impact goals!)

SMALLER

LARGER

Small
5-10
people

Medium
15-20
people

Large
50+

- Tight knit group that can all meet around a table, perfect for pre-existing groups (e.g. circle of family or close friends)
- Great for in-depth conversations and learning
- This can be a good initial size when you are getting started and can grow from there, just note that your pooled donation may also then be less

- *This is our recommendation at PhT for a great giving circle size as you get the benefits of a larger group but can still maintain close connections

- Has a very large multiplying effect! But is also more difficult to get to this number and to meet / organize
- Voting is easier than consensus with such a large group
- Often includes a leadership committee structure to help with certain tasks

**Your relationships bubble
out from you...**

**Brainstorm who could join
your giving circle across
many categories!**

YOU

Family

**Inner
Circle of
Friends**

Neighbors

**Co-
Workers**

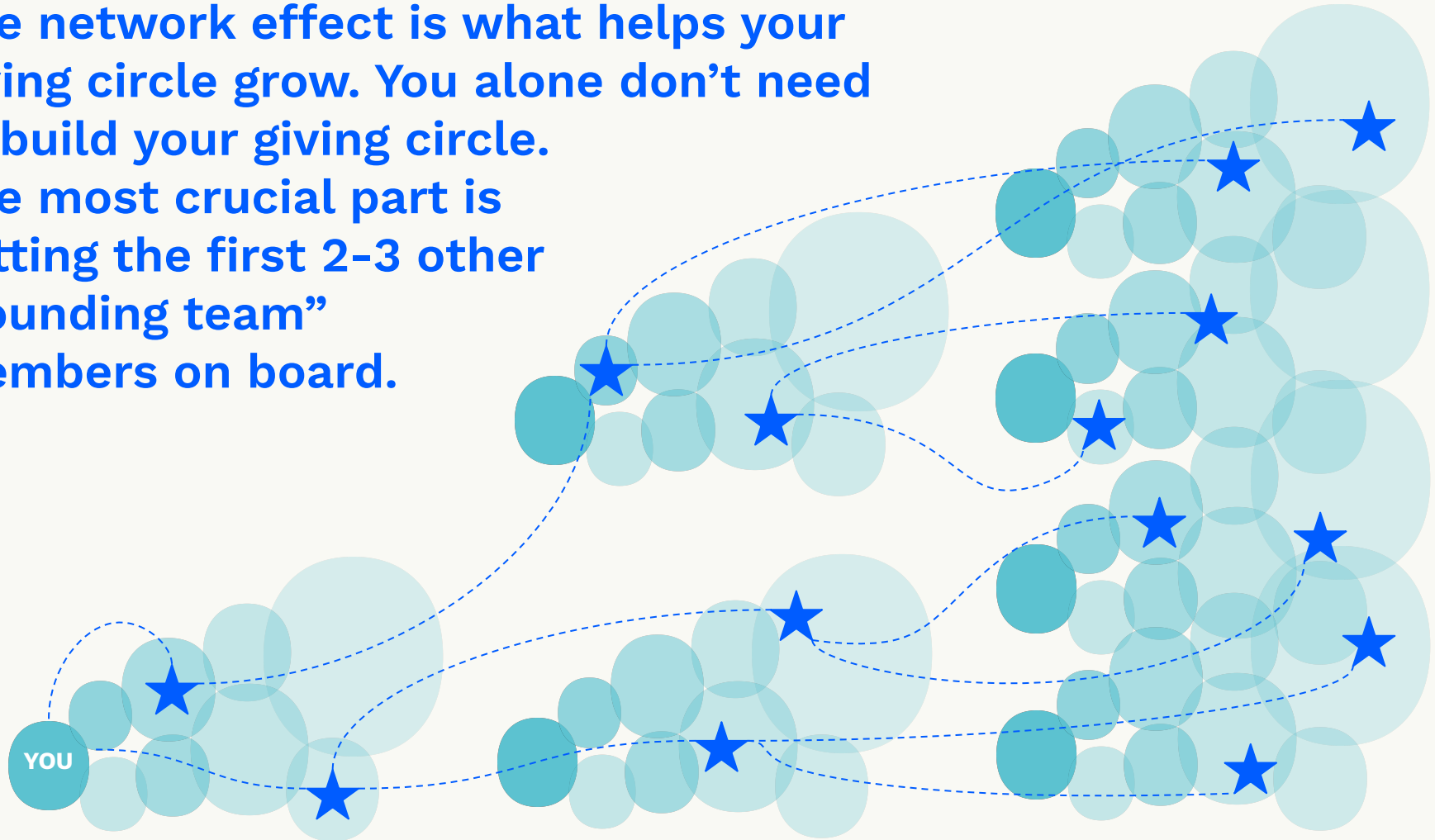
**Teams &
Communities**

**Broader Circle of
Acquaintances**

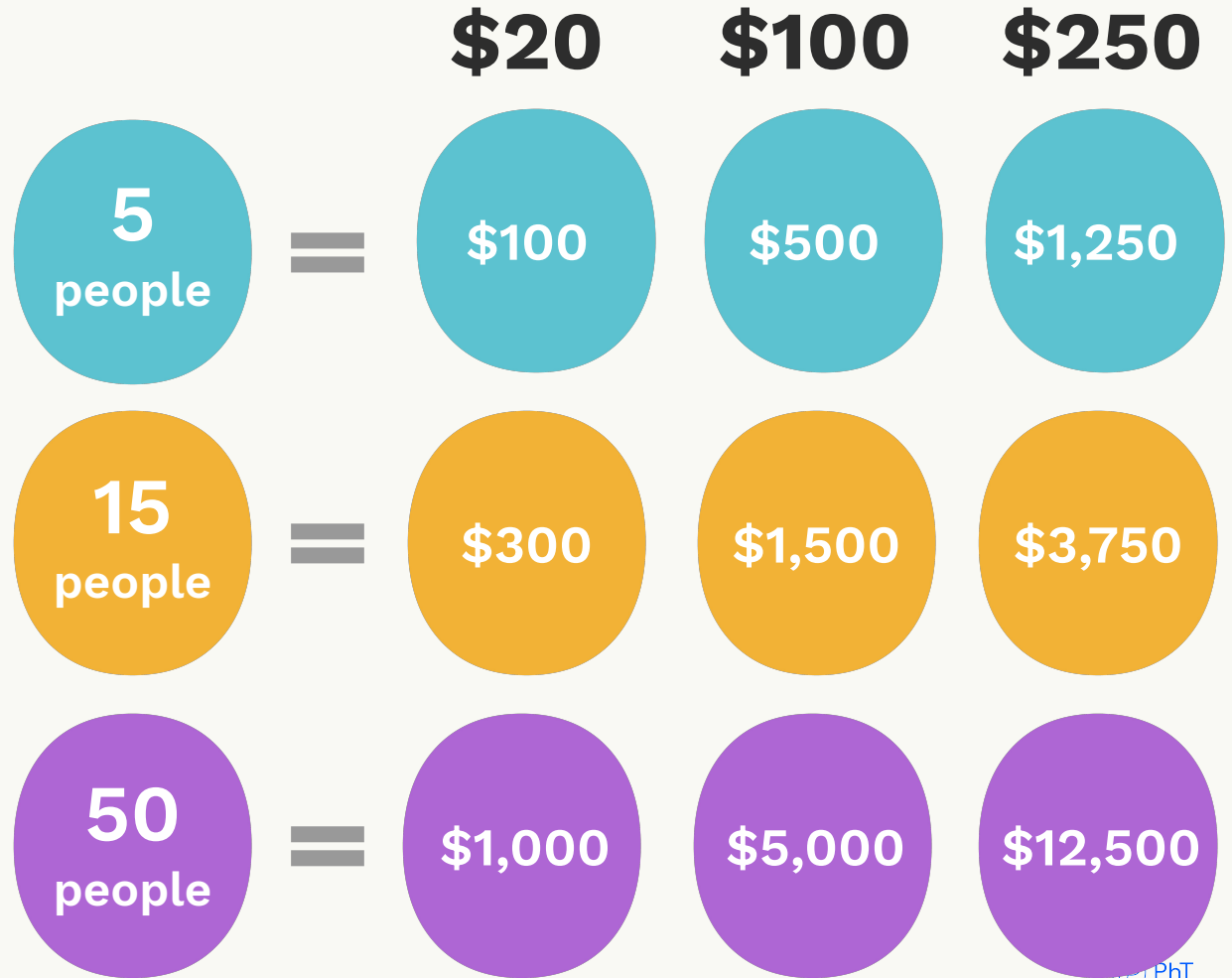
**Networks &
Associations**

**Social Media
Friends &
Followers**

The network effect is what helps your giving circle grow. You alone don't need to build your giving circle. The most crucial part is getting the first 2-3 other "founding team" members on board.



The multiplying effect of the collective is powerful!



10

Power of the Collective

What is “personally significant”?

\$20/
Month

\$1/
Day

\$100
Per
Quarter

1%
Income

\$250 /
\$500 /
\$1500

\$1,000
Year

\$5,000
Year

\$2,400

\$3,650

\$4,000

\$5,000
(~\$50k
income)

\$7,500
($\frac{1}{3}$ each
tier)

\$10,000

\$50,000

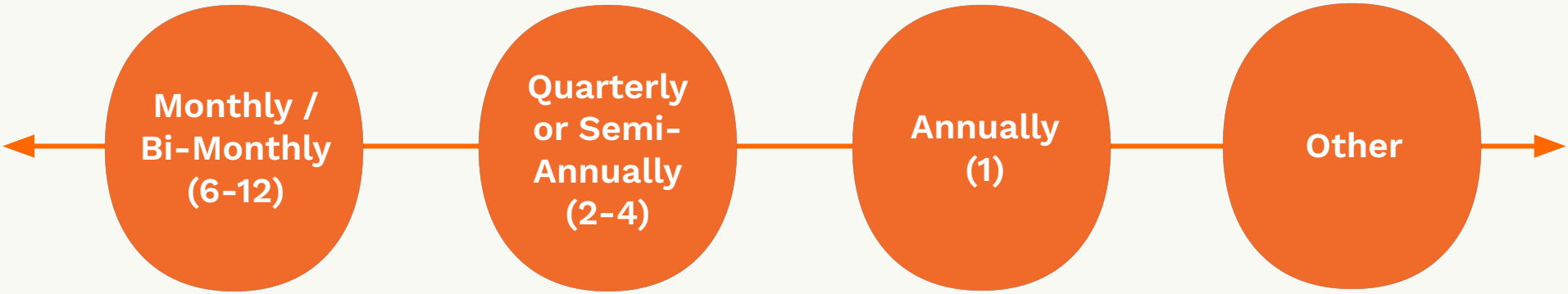
How often
will the giving
circle meet &
give?

How will the
giving circle
find & decide
on groups to
give to?

MORE FREQUENT

Giving Cycle

LESS FREQUENT



LESS WORK FOR NONPROFITS

Finding Nonprofits

MORE WORK FOR NONPROFITS



How giving circles can utilize Trust Based Philanthropy's 6 Principles in practice

Give Multi-Year, Unrestricted Funding

- Always give unrestricted pooled donations
- Consider the same groups for multiple years, or purposefully build in a secondary gift in year 2 as part of your model

Do the Homework

- Use a nominations or “secret philanthropists” approach
- Research to center the priorities of the people closest to the issues you seek to address
- Research and share publicly avail info about the circle to members (e.g. mission, programs)

Simplify & Streamline Paperwork

- Don't use an RFP unless you have to, and do invite-only when you can
- Keep any proposal questions to the bare minimum you need—what if you only had 2 questions to ask?

Be Transparent & Responsive

- Be clear about what your giving circle focuses on and funds
- Take extra care to be responsive to any groups' questions or needs. Especially since giving circle's are mostly volunteer run! Who is in charge of the “grantee” relationship?

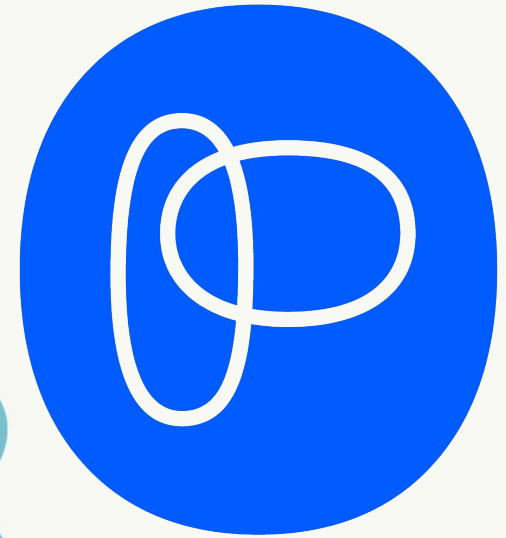
Solicit & Act on Feedback

- Ask at the end of a process how that was for the group you gave to and if they have any feedback
- Loop back with them if you act on their suggestions!

Offer Support Beyond the Check

- This is where giving circles excel!
- Make introductions
- Be an advocate
- Fundraise above and beyond
- Volunteer with them
- Highlight their work in your comms
- Have all members follow their work

Dig into your why and your shared values



Lean into trust

**Be true
advocates**



Join Launchpad!



Philanthropy Together

Launchpad
My Personal Giving Circle Toolkit

Name
Circle Name

- Guiding Why & Mission
- Focus Area(s) & Values
- Membership Size, Focus, & Culture
- Grantmaking & Decision Making Process
- Financial Contribution & Money Handling
- Name, Marketing, Website, Networks
- Growth & Strengthening Your Circle



Launchpad For You

great for individuals starting a giving circle with their community



Launchpad For Hosts

great for philanthropic intermediaries looking to host giving circles



Launchpad For Partners

great for facilitators who want to train future giving circle leaders

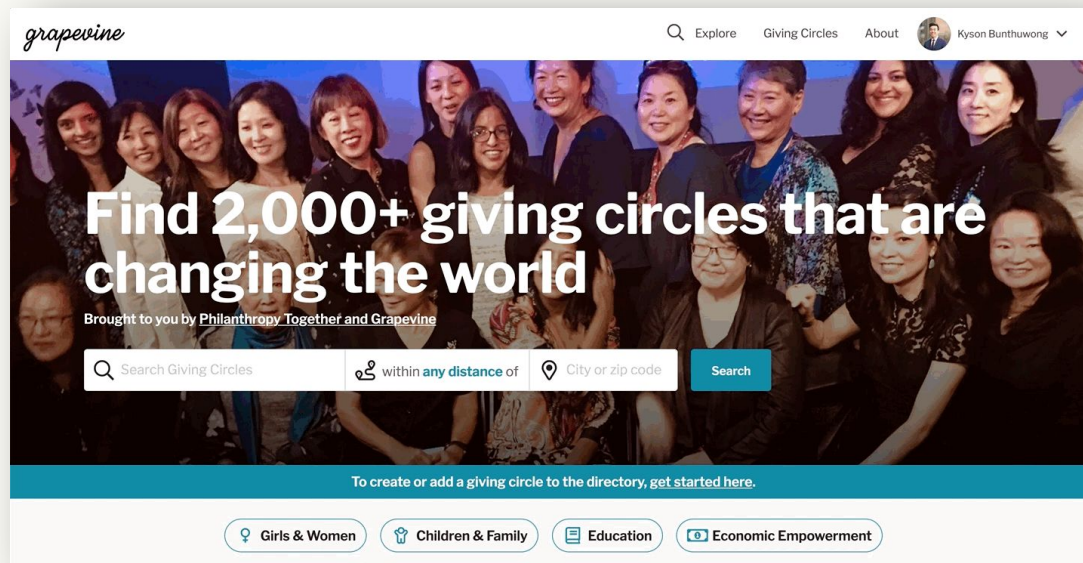
A helpful tool to explain giving circles!

whatisagivingcircle.com



Find one of 2500+ giving circles around the world in the only Giving Circle Directory.

Search by location, issue, financial contribution and more...



philanthropytogether.org/directory



Hear about the new research! collective.giving

New research
report release!

FREE WEBINAR

In Abundance: The 2023 Landscape of Collective Giving

Tuesday, April 2 // Noon - 1 p.m. ET

Register at <http://collective.giving>



Adriana Loson-
Ceballos, PhD
Colmena-
Consulting



Michael D.
Layton, PhD
Dorothy A.
Johnson Center
for Philanthropy



Isis Krause
Philanthropy
Together

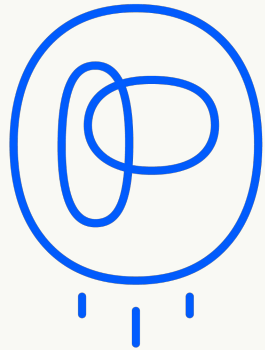


Sara Lomelin
Philanthropy
Together

Tuesday
April 2nd,
9 AM PT /
12 PM ET

Start Your Own Giving Circle!

philanthropytogether.org/launchpad



Launchpad
For You

Monthly
90-Min Training
to Launch Your
Giving Circle

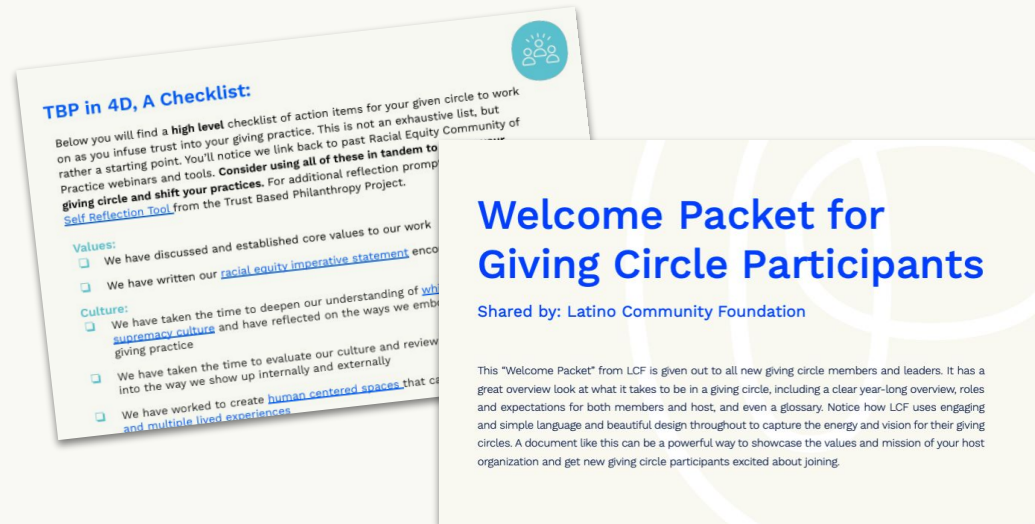
April 9

May 15

Find more resources in the Resource Library

philanthropytogether.org/resources

We update resources regularly. Let us know what templates and tools you need!



Register for We Give Summit!

May 7-9

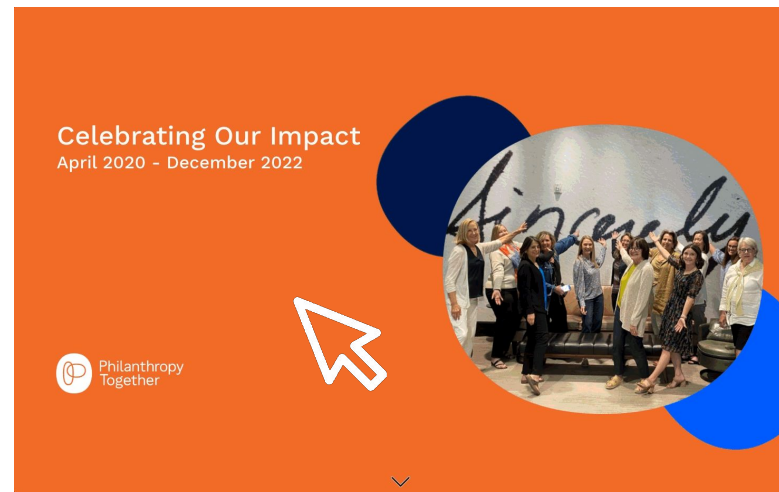
wegivesummit.org



**WE
GIVE** SUMMIT

100+ sessions
from previous
years are free to
watch
on-demand

Curious to learn
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