

# SPARKING CHANGE IN YOUR OWN COMMUNITY

Everything you need to know  
about starting your own giving circle







Mural Art in process by 2018 Grantee Fearless Collective

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Spark Co-Founder Fiona Hsu giving career coaching at Oasis4Girls Conference 2013

# GETTING STARTED

## What is a Giving Circle?

A giving circle is a form of participatory philanthropy where groups of individuals pool their resources (most often money, but also time and skills) and jointly decide where to invest them. This allows members to join together in a cause, amplifying the impact of their money and message.



## About This Guide

Our goal in creating this How-To-Guide is for the magic of Spark to continue to live on through passionate individuals like yourself looking to create philanthropic circles in your own community. Please note that while this guide is based on our experience over 14 years, it is meant as just that – a guide. The following pages contain our suggestions for how to learn as a community while supporting grassroots organizations in your own backyard. We hope it will be both helpful and inspirational for you.

## The Purpose of a Giving Circle

Starting a local giving circle dedicated to building community, peer learning, and grassroots grantmaking to advance a cause close to your heart is an exciting opportunity. Our recommendation is to start where young professionals want to be. Make meetings fun and easy – perhaps at a bar, in a conference room after work, or in your own living room. The most important thing is that this is a local group, focused on becoming emerging philanthropists and addressing social issues in your own backyard. At Spark, our focus was on advancing gender equality.

## SPARKING CHANGE IN YOUR COMMUNITY

We recommend building your circle around activities that fall into the following 3 categories:

### Educating

e.g. deep dives into specific issues facing women & girls globally

### Skill-building

e.g. grantmaking, how to measure impact

### Connecting

e.g. grantmaking and fundraisers, such as Cocktails for a Cause



Spark's first ever Cocktails for a Cause

## What is Spark?

Spark's mission is to advance gender equality by engaging the next generation in accessible forms of philanthropy. Spark was started in 2005 by seven co-founders in San Francisco who decided to create more opportunities for young professionals like themselves to make a difference.

In Fall 2019, Spark closed as an independent 501(c)3 in order to partner with [Global Fund for Women](#). Between 2005 and 2019, Spark members helped direct more than \$1.8 million in funds to 84 organizations in 34 countries, serving over 40,000 women and girls globally. During that time, thousands of young people in San Francisco and New York have participated in Spark programming designed to help us all become stewards for good. The Spark philosophy is that by providing young professionals with opportunities to engage in accessible forms of philanthropy in a community setting (read: giving circle), where they can learn and build skills, we can create positive social change together. This is the essence of Spark's theory of change, which you can [see here](#). And as evidence of this, many Spark members have gone on to become powerful advocates for gender equality, in corporate boardrooms, other non-profit organizations, and in government.

# BASIC PRINCIPLES OF A GIVING CIRCLE



Girls at Oasis4Girls Conference with Spark in 2013

We recommend that you come up with operating principles to serve as an extension of your mission. At Spark we operated on the following:

1. Invest in Women: When you invest in women, they reinvest in their communities. Their impact is exponential.





2. Engage Young People:

Young professionals are looking for ways to make an impact. Spark provides these opportunities.

3. Giving Beyond \$:

Grassroots organizations need more than money. We provide a combination of money, time, connections and attention to scale their impact.

4. Invest in the Long Term:

Providing young professionals with education and leadership opportunities leads to long term investors and advocates.

## Building a Community

Building a community starts with you and your social network. A giving circle can start with as few as 4 people and grow to as many as you would like to manage.

Options to connect with community:

- Facebook Group
- WhatsApp Group
- Slack Channel
- Google Group

## **Creating a Brave Space**

People have strong feelings associated with both money and social impact. As such, it is important to create a safe and inclusive space. We have chosen to call this a “brave space” because we believe that courage is a necessary ingredient in learning, especially when dealing with issues of social justice. At Spark we found the following guidelines to be helpful to us and encourage you to either adopt these, add to them, or change them to suit the needs of your community.

### Values

1. Be inclusive of all leaders and community members who are committed to advancing gender equality, and not discriminate against anyone based on gender, age, race, religion, origin, nationality, or sexual orientation.
2. Be of high integrity at all times and create alignment between your commitments and your actions.

### Behavioural Ground Rules

Rather than simply informing the group of the ground rules of conversation, we feel this is a great first opportunity to set the tone



of the rest of the discussion.

We suggest doing so by crowdsourcing what those present feel are important to them. Below are some suggested guidelines, along with questions to guide further engagement. Setting ground rules by committee encourages exactly the type of brave space you are trying to create.

- Respect
- Listen
- Be present
- Seek first to understand then to be understood
- Controversy with civility
- Own your intentions and your impact
- Challenge by choice
- Choose language carefully

### **Grantmaking Criteria**

Before it's time to give away money, it's important to establish some rules. These are the criteria that you will use to evaluate each organization for a grant. At Spark we had both criteria and priorities. Criteria are requirements that each grantee must have. Priorities are things we preferred to see in a potential grantee, but did not require.



Participants in one of Spark 2018 Grantee Fearless Collective's mural projects

# STARTING YOUR OWN GIVING CIRCLE

## What's Your Mission?

All of our work as Spark was centered around one goal: advancing gender equality. It's important to take some time to determine your personal mission and that of the giving circle. You could either do this before getting started or go forth with the general idea of starting a giving circle, gather your first 3-5 members and then use your first meeting to decide upon a mission statement and goal.



Here are a few questions to help you on this journey:

- What problem are we looking to solve?
- What is the purpose of our community?
- How will we achieve our purpose? Be specific.
- What are our values?
- Who is our target demographic for members?
- Who are we seeking to serve? Include any and all relevant details including geography, socio-economic status, age, gender, sexual orientation, etc
- What are our goals for the next year?

## **The Commitment of a Circle Leader**

We believe in giving young people the opportunity to lead. Becoming a founding co-chair of a new giving circle is an incredible leadership opportunity that will give you the experience of a lifetime while also creating positive change in your community. We have found that it is important to have co-chairs of the new circle who can commit to a year of service. Co-chairs commit to the following responsibilities:

- Spearheading programming for the year
- Creating a steering committee of 5 – 10 active members
- Meeting with prospective circle members, sharing more about how to get involved

## **Recruiting a Co-Chair**

We've found it's a best practice to have two co-chairs to share responsibilities for the circle. If you don't already have a second

leader, feel free to recruit a co-chair at one of your early events. You will want to make sure they are as committed as you are.

## **Selecting a Steering Committee**

The Steering Committee will be responsible for running the giving circle. Therefore it should be a smaller subset of the circle, comprising of 5 –10 active members.

### Steering Committee Benefits

- The opportunity to represent the circle at relevant conferences, fundraisers, and other events in your city that pertain to women’s issues and philanthropy
- Leadership and fundraising training

### Steering Committee Eligibility Requirements

- Must be a member of the giving circle
- Must share the values of the giving circle. For Spark this was investing in grassroots women’s organizations, engaging millennials and men in women’s issues, and developing new philanthropic leadership models
- Must commit to raising a certain amount per year. We recommend starting at \$1,000/year. This can come through personal donations, recruiting members, corporate matches, hosting fundraisers, or other sources
- Must engage with the broader circle community, either by attending Investment Committee meetings, or taking one-on-one meetings or calls with interested members to help educate them on the giving circle



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- Must be willing to leverage resources for the benefit of the community. This includes but is not limited to: using relationships with experts in the field to arrange speaking engagements, sharing personal knowledge and expertise with the community, finding venues for events, helping identify potential grantees through professional or personal networks (or just hard work!)
- Attend quarterly Steering Committee meetings, which will be held either in person or over the phone
- Be willing to serve on the Steering Committee for a minimum of 2 years
- Preference will be given to individuals who plan to live in the area for the foreseeable future

### Steering Committee Selection Process

Giving Circle Co-Chairs can choose to either nominate candidates to the Steering Committee or have them go through an application process.

# GRANT- MAKING 101



Passionate Speech given at Oasis4Girls Conference 2013

You can add more programming later (e.g. educational talks and workshops), but this was the bread and butter of Spark and how we believe you can create the most impact within your community. Here are some guidelines on how to start a giving circle (aka “Investment Committee”) and how to raise funds for the chosen organizations. Below is an example of Spark’s criteria and priorities.

## Spark’s Grantmaking Criteria:

- **Addresses Root Causes:** We support organizations engaged in addressing the root causes of challenges that women and girls face, which can include but are not limited to gender norms, poverty, education, economic opportunities, and access to health resources.

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- **Meets an Unmet Need:** We look for organizations that provide a service that is not currently available to women in that geographical area.
- **Employs norm shifting and innovative solutions:** We prioritize organizations that use creativity to improve lives while challenging traditional norms and approaches.
- **Has leadership comprised primarily of local women:** We specifically select organizations with leadership comprised of at least 50% of women from the community served.
- **Has a budget under \$150K:** We want to make a difference with our \$3-5K grant, therefore, we support only organizations with an annual operating budget under \$150,000 USD.

### Spark's Grantmaking Priorities

In addition to meeting the criteria above, organizations with the following characteristics may be given priority.

- **Belief in the Leader:** As with most startup endeavors, Spark shows favorable consideration to strong, passionate, persevering leaders with qualities that make us believe they will make their initiative a reality.
- **Entrepreneurial Spirit:** Spark believes in funding organizations that are “taking a chance” to improve their local communities.
- **First/Early Funder:** Spark takes pride in being an early funder and being the “spark” for an organization to achieve long-term success.
- **Beyond the Dollar:** We want to give more than just money, but have organizations tap into our pool of diverse talent.



## Investment Committee

The Investment Committee is where all the funding decisions are made. This section outlines how to source, vet, and select grantees for your giving circle. Fundraising for the grant will be discussed in the section entitled [“Fundraising” below](#).

### Stage 1: Research and Outreach

Once you have established a giving circle, it’s time to mobilize the community and start creating impact. That means finding and funding awesome grassroots nonprofits advancing your mission within the local community. Grantee organizations must always meet your grantmaking criteria that you set out at the beginning.

#### *Sourcing Grantees*

Finding grantees may seem daunting at first, but you likely already have connections to eligible organizations. You just haven’t thought about them through this lens before. First and foremost, we recommend asking your networks for referrals. This means each chapter member posting on Facebook (groups as well as individuals’ walls), Instagram, Twitter, and listservs, and sending an email to their network asking for recommendations of local nonprofits that meet the criteria. A sample email is available in the [Appendix here](#).

Another good way to find potential grantees is to do some good old-fashioned Googling yourself. Start by searching the name of your city/town AND terms that are related to your chosen issue area. For example, for Spark that would include gender equity, gender equality, women and girls, feminist, women’s empowerment.

Finally, search for grantmaking organizations who fund in your interest area and ask them if they can refer grant applicants.

A few potential organizations to reach out to for issues relating to gender equality include:

- Global Fund for Women
- Women's Funding Network
- Women's Foundation of California
- The New York Women's Foundation
- Rise Up
- Alliance for Girls
- Oasis for Girls
- Ms. Foundation

### Stage 2: Review

Once you have received enough referrals to feel you have a strong pool of candidates, the Steering Committee should then meet to review the organizations and determine which ones meet the grantmaking criteria, creating a shortlist. If there is an organization that you find interesting, but are uncertain if they meet all the criteria, it is up to the Steering Committee to determine whether or not to include them on the shortlist. These will be the organizations for which you arrange an onsite visit.

A summary sheet of the shortlisted organizations including a brief summary of each should then be shared via an in-person meeting of the Investment Committee, an email (see [Appendix](#)), or both. Along with the summary sheet, include a request to sign up for site visits.

### Stage 3: Arranging an Onsite Visit

The next step is to arrange an onsite visit with each prospective grantee. Most likely you will do so via email (see [Appendix](#)). It is also recommended that at least 1 Steering Committee member attend each site visit.

Here are some things to keep in mind in preparing for the site visit:

- Define the goal of the visit
- What outstanding questions (if any) do you have regarding eligibility for a grant?
- What other questions would you like to have answered before considering funding them?

Here are a few you may want to ask:

- What is the primary mission of the organization?
- What is their primary strategy for carrying out their mission?
- What is their relationship like with their community?
- How do they define success?
- What are they seeking funding for?
- What amount of money would help them make meaningful progress towards that goal?
- What other types of support do they need (e.g. pro bono)?





Spark 2017 Grantee - NexGene Girls - San Francisco

#### Stage 4: Invite to Apply

Immediately following the site visit, those members who attended should debrief to determine whether the organization meets the grantmaking criteria. If it does meet the criteria, email them inviting them to apply for a grant. If the organization does not, email them thanking them for their time and informing them that unfortunately, upon review you have determined they do need meet your grantmaking criteria. It is unlikely that an organization would get this far and not meet criteria, but should that happen, it's important to be respectful of the time they dedicated to sharing their work with you.

See sample emails in [Appendix here](#).

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### Stage 5: Vetting

Once the applications are received, they need to be vetted according to your grantmaking criteria. You could choose to do this either remotely or in-person. Either way, each application should be reviewed by 2-3 people and then scored on a scale of 1-5 for each criterion and priority.

In the event that you receive unsolicited applications, you should review them (step 2) and then decide whether to move their application forward.



Investment Committee - Sept 2018 - Criteria

## SPARKING CHANGE IN YOUR COMMUNITY

*For example:*

Rate questions 1-3 on a scale of 1-5, 1 being not at all and 5 being very much.

1. Does X-org address root causes of gender inequity?

1    2    3    4    5

2. Does X-org meet an unmet need?

1    2    3    4    5

3. Is X-org's work norm shifting and innovative?

1    2    3    4    5

4. Is the leadership primarily local women?

Yes or No

5. Is their budget less than or equal to \$150,000?

Yes or No

6. Do you recommend this organization for a grant? (If yes, this means you would like to see it considered at an Investment Committee meeting)

Yes or No



## SPARKING CHANGE IN YOUR COMMUNITY

Once all applications have been reviewed, we recommend some type of meeting, either via conference call or in-person, to discuss the applications and decide which to recommend for an Investment Committee meeting. Remember, meeting the grantmaking criteria is the lowest possible requirement for referring an organization to the Investment Committee. Simply meeting them does not mean you are excited about the organization's work and funding it. Take time to talk through each application and ask each other the hard questions about potentially giving the applicant a grant.

After a decision has been made whether or not to move an application forward to the Investment Committee, whoever is stewarding that application will get in touch with that applicant via email or phone to ask any follow up questions and either let them know they're moving forward, or send a rejection. Sample emails in the [Appendix here](#).

### Stage 6: Selecting a Grantee

The final stage in selecting a grantee is holding an Investment Committee voting meeting. At these meetings advocates for each organization explain the work of the applicant and the ways in which they would benefit from becoming a grantee. It is up to the Co-Chairs and the Steering Committee whether to invite non-members to these voting meetings, or to make them closed to members only.

#### *Advocates*

An advocate is a member of the giving circle who has volunteered to represent one of the grant applicants at an Investment Committee voting meeting. Often they will have attended the

## SPARKING CHANGE IN YOUR COMMUNITY

site visit and may have even helped the organization with their application, however this is not necessary. They need only be excited about the organization's work.

In advance of the meeting, advocates should have familiarized themselves with the grantee. At the meeting each presents a short (3-5 minute) summary, explaining the issues motivating the mission of the organization, how the organization achieves its mission, and how the organization meets the grantmaking criteria. During the meeting, attendees will have the opportunity to access the full grant application materials and can reference a summary chart (see [Appendix](#)) created by either the advocate or a Steering Committee Member.



Crystal Huber, Spark member and Mosintuwu Institute advocate giving her speech during one of our 2017 Investment Committee

## SPARKING CHANGE IN YOUR COMMUNITY

After hearing these impassioned presentations (see [Appendix](#) for guidelines), meeting attendees then break into small groups to discuss the strengths, weaknesses, and outstanding questions attendees have regarding the grant applicants. Once the small groups reconvene, the insights of each group are discussed and documented in the meeting's powerpoint, which is supplied by one of the Co-Chairs. Depending on the number of people in attendance, splitting into small groups may not be necessary.

### *Voting*

If you have invited non-members to the meeting, they should be given an opportunity to become members by paying dues. Once you have given them the opportunity to do so, all dues-paying members have the opportunity to vote for which applicant they would like to become the next grantee.

If voting meetings are open to members only, you can skip right to voting.

How you decide to conduct voting is up to you. At Spark, we've experimented with multiple different types of voting over the years including:

- [Dot voting](#)
- Paper ballots
- Text voting
- Mobile voting via platforms such as [Poll Everywhere](#) or [DirectPoll](#).



Former Executive Director Amanda Brock on a delegation to visit Spark grantees in Peru

### *The New Grantee*

After a grantee is selected, the Spark advocate of the selected organization notifies the selected grantee of the decision reached during the meeting, as well as relays any additional questions or feedback. They should include the Co-Chairs on CC. Sample email in [Appendix here](#).

The Steering Committee then works with the grantee to onboard them as a grantee, later requesting grant reporting and, if possible, coordinating updates to be presented at fundraisers.

The other grant applications are notified by the Co-Chairs that their application was unsuccessful. Sample email in [Appendix here](#).





Art in process by 2018 Grantee Fearless Collective

# NEW GRANTEE. NOW WHAT?

Now is the opportunity for members of your giving circle to get even more deeply involved in the issues they care about by volunteering and fundraising for the grantee. In addition, you may want to send a grant agreement and request a grant report a year later. This section will provide guidance on this. Remember, these are all suggestions. It's up to you how you operate your giving circle.

## **Grant Agreement**

If you're giving money to a 501(c)3, you don't actually need to draw up a grant agreement. In fact, it's technically not a grant if you're just donating. If you do decide to send your grantee a grant agreement, we've included an editable example in the [Appendix here](#).

## **Pro Bono Support**

Providing pro bono support and other connections on an ad hoc basis is a great way to connect with grantees on a deeper level and really feel the positive impact you're having. The most common pro bono requests we've seen over the years include, but are not limited to:

- Fundraising
- Graphic design
- Website development (nowadays this can be much more easily done with help from platforms such as Squarespace, Wix, and Strikingly)
- Accounting
- Data analysis

## SPARKING CHANGE IN YOUR COMMUNITY

# TANMA

**empowering women through handicraft**

Tanma, meaning "strong" in Burmese, is a cooperative run by and for refugee women from Myanmar.

We stand together to develop our projects and activities through handicraft, fair trade, empowerment and livelihood programs.

**Chin Women's Organisation (CWO)**  
Authentic Batik Accessories

**Kaoprise**  
Bath and Spa Products

**Ing Raw**  
Authentic Handicrafts

**Mangtha**  
Traditional Fabrics—  
Modern Accessories

**Paw Ghee**  
Fine Jewelry,  
Housewares,  
Accessories

By buying our products, you are helping our artisans to get a fair wage and provide food and housing for our families in KL.

By supporting us, you are also allowing us, as a cooperative, to invest in women. Through trainings and workshops, we develop new skills and we are empowered.

[tanmawomen@gmail.com](mailto:tanmawomen@gmail.com)  
+60 16-958-7782  
@tanma.federation  
@tanmawomen



The map shows Myanmar divided into several regions, each with a callout to a specific community and their products:

- Ing Raw KACHIN STATE**: Callout shows colorful woven fabrics.
- Mangtha CHIN STATE**: Callout shows a person working on a colorful woven bag.
- CWO CHIN STATE**: Callout shows a batik patterned fabric.
- Paw Ghee KAREN COMMUNITY**: Callout shows gold jewelry.
- Kaoprise MON STATE**: Callout shows a lit candle in a glass holder.

Spark Member and Designer, Vivian donated 10 hours of her time to 2018 Grantee Tanma Federation. She created 3 priceless pieces depicting TANMA's impact serving Burmese women refugees in Malaysia.

This is one of them



## Grant Reporting

Part of being a good steward of grassroots giving is being sensitive to what you ask for from your grantees. These are small organizations with limited resources. Don't ask them to send you a 10-page report for a \$5,000 grant. Please note that it's not necessary to request a report. However, if you would like to, you can review an example of Spark's reporting mechanism in the [Appendix here](#).

## Other Programs to Consider

At Spark we used to host roughly 40 events per year to engage our community in giving, leading, and learning to advance gender equality. If you would like to engage your community beyond grantmaking you can view examples of past events to consider as reference [here](#).



Former Program Director Meghan  
Stevenson-Krausz and Madame Chandi at  
Spark's 2019 Kickoff





# FUND RAISING

Cocktails for a Cause  
2014

## Membership Dues

One way to fund grants is through membership dues. It's important to consider the demographic of your potential members as you set these. At Spark, annual dues started at just \$100, in order to ensure accessibility. Your dues will not be tax-deductible unless you decide either to become a 501(c)3 or get a fiscal sponsor. More on becoming a non-profit [here](#) and fiscal sponsorship [here](#).

## Cocktails for a Cause

It is likely that you will want to raise additional funds to be able to give larger grants to your grantees. We found that one of the most effective ways to do so is through what we called a "Cocktails for a Cause". This is basically a 3-hour party on a weeknight at a local

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venue, where you can showcase the work of the recent grantee and bring together the wider community.

Depending on several factors (location, cost, etc) we have been able to raise anywhere between \$3,000 – \$10,000 for our grantmaking from events like these. It's your choice whether to fundraise for one grantee or many, and whether to donate all the funds to the grantee(s) of the hour or keep them in the bank for future grantees. We would generally give grants of around \$4,000, so would raise funds for multiple grants at a time at each Cocktails for a Cause.





NYC Cocktails for a Cause  
November 2018

**SPARKING CHANGE IN YOUR COMMUNITY**

Timeline/Checklist




This is an example of a checklist we used for planning a Cocktails for a Cause or similar event. Please note, this is meant for reference only.

**10 weeks out**



 <b>TO DO</b>	 <b>DONE?</b>
Decide tentative Cocktails for a Cause (CFAC) date	
Start looking for venue: - of appropriate size, preferably private - easily accessible by public transport - free, or close thereto (unless you get a sponsor) *We've found that most bars have an event space they will donate if it's for a charitable cause. Additionally, bar minimums are negotiable.	
Questions to ask venue manager: - drink specials (e.g. specialty cocktail) - microphone - table for ticket purchasing - Wi-fi - snacks/food or bring food in - bar minimum to meet if any	

## SPARKING CHANGE IN YOUR COMMUNITY

### 6 weeks out

 <b>TO DO</b>	 <b>DONE?</b>
Secure & Confirm Space (if not done before)	
<a href="#">Create Eventbrite Page (we recommend using Canva for marketing images)</a>	
<a href="http://www.signupgenius.com">Create Volunteer Sign-Up (http://www.signupgenius.com)</a>	
<a href="#">1st Mailchimp Email (see notes on external communications below)</a> 	
Reach out to potential sponsors	
Look for food sponsors (most need at least 6 weeks to approve)	
Recruit members to be “Event Ambassadors”.	
*Event Ambassadors are volunteers who help get the word out about the event by committing to inviting their friends and sell a certain number of tickets. They do so by sharing on social media and sending email blasts to their networks. They may also help get in-kind donations or sponsorship for the event. Some people will feel more comfortable with one or the other. Both ticket sales and sponsorships/donations are important.	

### 4 weeks out

 <b>TO DO</b>	 <b>DONE?</b>
Create Promo Templates	
Email members at all corporations and ask to promote (with templates). Provide comp'd tickets accordingly	
Email all partners and ask to promote	
2nd Mailchimp Email	
Mailchimp to up to date Members, reminding them about discount	
MAIL MERGE Individual email to expired Members, reminding them to renew and discount at the events, like X one coming up	
Continue outreach to potential sponsors	
Post in all relevant Facebook groups about event	
If you know anyone at Facebook they can provide sponsored Facebook posts with their monthly \$250 stipend	





## SPARKING CHANGE IN YOUR COMMUNITY



### 2 weeks out

 <b>TO DO</b>	 <b>DONE?</b>
2nd Reminder to Members to request help spreading the word	
3rd Mailchimp reminder	
Reminder post in all relevant Facebook groups about event	

### 1 week out




 <b>TO DO</b>	 <b>DONE?</b>
3rd Reminder to Members to request help spreading the word	
Buy gift for speaker (if relevant)	
Mailchimp Reminder (depending on RSVPs)	
Send individual facebook messages to all “maybes” and ask them to come	
Confirm with venue manager	
Buy name tags	
Sell tickets	

### 2-3 days before

 <b>TO DO</b>	 <b>DONE?</b>
Email Volunteers ( <a href="#">email template</a> 📄 + <a href="#">volunteer packet</a> 📄 )	
Order Food	
Confirm any donations/sponsorship	
Final Mailchimp reminder	
Write speech - include acknowledgements	



**SPARKING CHANGE IN YOUR COMMUNITY**

**Day of**

 <b>TO DO</b>	 <b>DONE?</b>
Send reminder email to all members & community	
Ensure Eventbrite Organizer App is downloaded on phone for check-in (or print attendee list)	
Print donation forms (see <a href="#">Appendix</a>  )	
Print promotional fliers	
Write thank you card for speaker	
Checklist to bring with you to the venue:	
Name tags	
Donation forms	
Cash to make change (or decide it will be a cashless event)	
Square credit card reader (and username and password)	
Laptop, power cord, extension cord	
Pens for name tags and forms	
Promotional fliers	
Any signage	
Camera/video (see if you can get a volunteer who is a professional - it's worth it)	
Volunteer list	
Volunteer info sheet	
Snacks, napkins, and utensils	
Arrive on site 1 - 1.5 hrs before event doors open	
Volunteers to arrive and get short training (timing will depend on the event)	
Check Projector	

## SPARKING CHANGE IN YOUR COMMUNITY

### Day After



 <b>TO DO</b>	 <b>DONE?</b>
Thank you Emails	
1. Speaker	
2. Moderator	
3. Venue	
4. Volunteers	
5. Sponsor	
Email to Attendees	
1. Write note (include member engagement form & link to become a member, offer to come meet us for coffee, next event is x-date)	
2. Put list from Eventbrite into MailChimp	
Update Google Group (if using)	
Update Mailchimp (if using)	
Social Media Thank You	
Upload Photos to Facebook Album	
Email all new members a welcome and what's coming up	
Email non-members/registrants via mail merge, thanking them for coming and asking if they want coffee to get more involved	

**SPARKING CHANGE IN YOUR COMMUNITY**



Event Promotion Checklist

Please note there may be some duplication between these two lists. However the list below is exclusively a reference for event promotion.

**COMMITTEES**

 <b>TO DO</b>	 <b>DONE?</b>
Email members, provide email & social media templates and talking points on grantees (depending on event)	
Email broader community (even if not paying members) w/ same info as members	

**SOCIAL MEDIA CHECKLIST**

 <b>TO DO</b>	 <b>DONE?</b>
Promote 2 - 3 times per week on Facebook in the event page, create a list of posts and a calendar	
Promote weekly on main Facebook page (if have one)	
Promote to partners on Twitter	
Send individual facebook messages to all “maybes” and ask them to come	
Coordinate with any members who work at Facebook to provide sponsored Facebook posts, with their monthly \$250 stipend	
Post in all relevant Facebook groups about event	





Former Executive Director Amanda Brock welcoming people to a Spark Investment Committee in Sept 2018

# ADMINIS- TRATION

## Record Keeping

It's important to keep track of your members, donors, and grantees in some way. This need not be a fancy CRM. For members/donors we recommend a Google Sheet with names, addresses, phone numbers, emails, and each individual donation. Alternatively, you could try free CRM software like Hubspot or Streak. And if you do decide to become a nonprofit, you could qualify for a free Salesforce account through their [Nonprofit Success Pack](#).

As a record of your grantees, we recommend a similar Google Sheet listing all grantees, how much was raised to support them, and

any pro bono services that were provided, including connections to other funders.

## **Sending Grant Money**

We strongly recommend you only give grants to nonprofits in your local area. Or, at the very least, only supporting nonprofits that are registered 501(c)3's in the US or have a US fiscal sponsor. Should you wish to support organizations that do not have such certifications, here is some advice based on our experience over the years:

1. If the organization is not a registered nonprofit and does not have a fiscal sponsor, request a letter signed by 2 other Board Members (or otherwise responsible parties) confirming that the organization exists to pursue its stated mission and that by sending funds to an individual bank account, those funds will be used to further said mission.
2. If the organization is located internationally, send a \$100 test wire transfer. Once the organization has confirmed receipt of the initial wire transfer, send the remainder of the grant. Note: there are always fees associated with wire transfers. If you cannot negotiate these fees with the bank, you will need to choose whether or not you will cover that fee or it will be part of the grant.
3. If the organization is located internationally, check the U.S. Department of State's website to ensure they are not on a list of places where they don't recommend sending funds.

## External Communications

Above we shared some tools for communication amongst members. As you grow, you may decide you'd like to start sharing updates with a wider network. For example, Spark grew from 7 founders to a network of over 17,000.

Here are a couple of tools that we have found useful to use for engaging with our network:

- [Mailchimp](#) (there is a free version) or similar tools for managing email communications
- [Google Groups](#) (both for members and non-members)
- [Facebook page](#)
- [Instagram](#)
- [Twitter](#)
- [LinkedIn](#)

## Costs

You are responsible for any costs incurred by your giving circle. We encourage you to find free or donated venues to hold your meetings so there is no cost or a very minimal cost. If needed to offset any costs, you can ask attendees for a small donation (\$5 to \$10 per meeting).

## Succession Planning

As Circle (Co-)Chair(s), we recommend that you identify and select the future Chapter (Co-)Chair(s) for your city before moving on from the role. You can choose the person yourself or via a Chapter vote – your choice. A volunteer-run giving circle will only last as long as there are dedicated leaders in place.



“Bonded Not Bound” — a mural by 2018 Grantee Fearless Collective in Mumbai from 2015



# OTHER RESOURCES

- [Spark Website](#)
- Spark Social Media

-  Facebook
-  Instagram
-  Twitter
-  LinkedIn

## SPARKING CHANGE IN YOUR COMMUNITY



Spark has been a community effort made possible by our donors and supporters around the world.

Thank you.  
This is for you.

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“Essie Kids” enjoying in an Essie Justice Project Activity in Oakland. Essie Justice Project is a Spark 2015 Grantee

# APPENDIX

This is a collection of ready-made docs we’ve used throughout the years.

Please feel free to use one, none, or all to best suit your purposes. We’ve highlighted in yellow and put brackets around sections we’d imagine you need to customize, but we also recommend you reading through and changing additional content that will best serve your needs.

I. Appendix 1: Spark's Theory of Change

II. Appendix 2: Sample Email for Sourcing Grantees

III. Appendix 3: Sample Email to Members to Arrange  
Site Visit

IV. Appendix 4: Sample Email to Org Requesting Onsite  
Visit

V. Appendix 5: Sample Emails following On Site Visit

VI. Appendix 6: Sample Emails following Vetting Process

VII. Appendix 7: Sample Email to Advocates for Invest-  
ment Committee

VIII. Appendix 8: Sample Matrix

IX. Appendix 9: Sample Email to Selected Grantee

X. Appendix 10: Sample Email to Non-Selected Grantee  
Applicants



[XI. Appendix 11: Example of a Grant Agreement](#)

[XII. Appendix 12: Sample Grantee Report Form](#)

[XIII. Appendix 13: Sample Event Donation Form](#)

[XIV. Appendix 14: Sample Volunteer Info Sheet](#)

[XV. Appendix 15: Sample Volunteer Email for Events](#)