



party planning checklist



- Create a list of potential Giving Circle participants.
- Send a “save the date” message or an invitation.
(recommended 4 weeks prior to the event)
- Send follow-up messages to those who have not RSVP'd.
(recommended 2 weeks prior to the event)
- Plan the logistics for seating and tracking the discussion.
Potential Needs:
 - a piece of paper on the wall for writing ideas
 - pens and paper for each person
 - lines of sight to encourage discussion
 - low volume so everyone can be heard
- Plan, purchase, and prepare refreshments for the party.
- Send a reminder with directions to all participants sometime during the week before the party.
- Follow the **Building a Circle Guide** to facilitate the discussion.
- Go online at **mycoloradoproject.org**. Create your Giving Circle and invite your friends to join.
- Follow-up with party participants who have not joined the Giving Circle after one week.
- Send a thank you message to all participants with the results of your Giving Circle launch.

contact mycolorado@cshares.org with any questions about planning your party

your guide to hosting a **GIVING CIRCLE** Planning Party

mycoloradoproject.org

Your Giving Circle

Leading a Giving Circle is an opportunity to engage a group of friends in a meaningful and fun community investment. Each participant can give as little as \$5 each month and you can watch your shared giving grow.

Who's in Your Circle?

If you are creating an ongoing giving circle, simply draft a list of everyone you would like to take part. Do you have a group of people linked by a common thread? It could be a core group of friends, a book club, your small business, a mommy and me group, your family, or an affinity group such as alumni from a learning or leadership group. If you are doing a one-time fund drive with a giving goal, keep in mind it is best to invite at least twice as many people as you hope to attend and give.

Send the Invite Right!

Two pieces of house party etiquette about party “notice”. First, it is best to give people at least four weeks notice when hosting an event. Second, the invitation should include notice that you are hosting an event where people will be asked to join a fundraising giving circle. No participants should be surprised at the party by the discussion or the “ask” to join a charitable giving group.

Pre-Party Participation

If you want your Giving Circle participants to come prepared with nominations for recipient, ask them to review a list of Community Shares member agencies prior to the party. Encourage people to complete their own Personal Philanthropy Plans so they are ready to talk about their personal connection to the causes they care about most.

Nonprofit List: www.mycoloradoproject.org/nonprofits

Personal Philanthropy Plan: www.mycoloradoproject.org/plan

Fill the Room

Call anyone who has not responded to your invitation after 1-2 weeks and encourage them to attend. Send all attendees a reminder message in the week before the event with the time, date, and directions to the party.

Party Planning

This step comes more naturally to some than others. Depending on the size of your circle you can meet anywhere from a neighborhood pub to a house selected for its size. If you are the host, don't forget refreshments and comfortable seating.

When party planning, consider the following questions:

- How much space do you need for the number of people attending?
- Will everyone be able to see and hear the person speaking?
- Will people expect food at the time of the event?
- Do you need paper and pens to track the discussion?

Selecting Your Recipients

Facilitating this discussion can take a variety of forms that fit the culture of your group—what is most important is that people are engaged in the decision making process. Use our guide, **Building a Giving Circle**, to help facilitate the discussion. If you are able, have someone on a computer during the discussion building the Giving Circle as you go so people can make donations that night.

Ask for Donations

When asked why they did not make a donation to a nonprofit, people's #1 response is “no one asked me”. Be sure to end the discussion by clearly asking people to go online and make an ongoing donation in support of the giving circle. (See **Building a Giving Circle** for tips on asking for a donation.)

Immediate Follow-Up

Finish setting-up your Giving Circle on mycoloradoproject.org within 24 hours to build on the momentum of the party. Send all participants an invitation to join the Giving Circle. Follow-up one week later with those who have not responded.

Complete the Circle

As the leader of the Giving Circle, you can make participation meaningful throughout the year. Schedule a volunteer project with each of your selected recipients. Use My Colorado's blog feature to post cause-related news and stories. Send thank you messages to participants.