PEER CIRCLES PLANNING GUIDE

A TOOLKIT FOR FUNDERS

Whereas formal lectures and panel presentations are valuable educational opportunities, peer discussion is one of the most effective ways the Exponent Philanthropy community learns about the practice of philanthropy.

Peer Circles are forums for lean funders to convene colleagues for learning and networking in an interactive, personal, and relevant forum. These conversation groups are hosted and managed by members and primarily based in local communities, but they also can be held virtually, especially in non-urban areas where funders are geographically dispersed.

Exponent Philanthropy enables members to host Peer Circles with support materials, conference call options, and avenues for spreading the word.

exponent philanthropy

1 Structuring a Peer Circle

There are many ways to structure these 1- to 2-hour conversations for an interesting, fun, and productive discussion. Here are some ideas:

- Send out a reading in advance with prompting questions.
- Send out thought questions in advance on a particular topic.
- Facilitate a discussion on a specific topic.
- Host a networking activity.
- Bring people together to learn about a local community issue or explore ways to collaborate on an issue.

2 Planning a Peer Circle

You'll find a checklist of items to help you stage your planning later in this guide. For promotion purposes, you'll want to determine the following details early in your planning process:

1. Day and time—Check to be sure it doesn't overlap with other local philanthropy events.
2. Location name and address—Select a local venue if you are meeting in-person, or meet virtually. Keep accessibility in mind when selecting a venue.
3. Title—Be clear and descriptive
4. Description—Use roughly 150 words to give others an idea of what the discussion will be.
5. Food—Note if you'll be offering any refreshments, or if it's brown bag meal or other.
6. Contact person's name, email, and phone.
7. RSVP date, if there is one.

3 Spreading the Word

There are a number of ways to promote your peer circle:

1. List your peer circle on Exponent Philanthropy's online calendar. Send staff your information, and we'll post online within 2-3 business days.
2. Post to our online discussion list. We encourage you to post to Exponent Philanthropy's general discussion list.
3. Invite other members using a list you create. Go to Exponent Philanthropy's member directory to search for members within a radius of your zip code, the funding area of focus, or other demographics.
4. Reach out to your personal network.

Questions?
Contact Exponent Philanthropy at info@exponentphilanthropy.org or 202-580-6560.

Planning Checklist

2 Months Prior

____ Determine:

☐ Date

☐ Time

☐ Location

☐ Venue

☐ Title

☐ Description

____ Decide if you or your foundation will provide refreshments for the group, or if it's a brown bag lunch (or neither). Sometimes for brown bag meetings, a host buys water/soft drinks and/or dessert. Either way, food information should be included in the program information.

____ Start spreading the word using the recommendations on the previous page.

____ Collect RSVPs for the program.

1 Week Prior

____ Confirm room set-up with the venue as well as access to any needed audio/visual equipment.

____ Plan for signage at the venue if any is needed to get participants to the room.

____ Confirm food counts and order food, if food will be served.

____ Pick up "Hello My Name Is" stickers or another type of name tag.

____ Create a check-in sheet to capture participants' contact information.

____ Make copies of handouts, if any.

____ Email all confirmed registrants with a reminder of the day, time, and location and any instructions about getting to the venue. Also include any materials you'd like participants to read in advance.

Day of

____ Arrive at the location early, ensure the room is set up correctly, and post any signs.

____ Set out name badges and check-in sheet

____ Serve as host! Welcome participants, set a warm tone, and lead introductions of participants.

____ Make introductory comments, which can include:

- Who you are
- Brief outline of the Peer Circle agenda
- Location of restrooms
- Reminder to turn off cellphones
- Any ground rules (such as those on the next page) as well as encouraging questions, which enhance learning and connections

____ Close the program by thanking all participants. Comments can include:

- Summary of the learnings and discussion
- Directions to access additional resources on the topic
- Appreciation to all for attending and participating
- An invitation to think ahead to a next Peer Circle—when, where, what

After

____ Distribute any follow-up resources.

____ Be in touch with Exponent Philanthropy staff to let us know how it went.

____ Consider sharing the learning with other members by posting on the member discussion list or in a blog post.

____ Plan another Peer Circle.

4 Peer Circle Discussion Tips

Create a Safe Environment

- **Establish meeting agreements for communication, such as:**
    - **Candor with compassion.** The best learning occurs when peers share their experiences. Speak honestly with one another, but do so with tact, and remain sensitive to others' experiences.
    - **Make space/take space.** We ask participants to self-monitor their participation. If you sense that you are speaking significantly more than others, "step back" and let others have the floor. If you notice that you are remaining silent, "step up" and participate more actively in the discussion.
    - **Listen to learn.** Engage your active listening skills. That is, suspend your judgment while others are sharing. Suppress the urge to craft a response and truly hear what others are saying in order to learn.
- **Express a commitment to confidentiality and non-solicitation, such as:**
    - Participants and speakers will have access to and become acquainted with various proprietary and/or confidential information relating to program organizers and one another. All must agree not to disclose or use any of the aforesaid, directly or indirectly, in any manner, either during the program or at any time thereafter, except as required in the course of the program.
    - Participants and speakers must agree not to solicit clients or promote the services of their business or organization during the program other than to provide a business card or other referral only if directly requested.

Lead an Engaging Discussion

- **Ask open-ended questions**, such as, "How is this issue affecting you or your giving?"
- **Listen carefully, and ask questions back**. "So, Jill, what I hear you saying is X. Is that correct? Does anyone see the situation differently?" You may want to jot notes throughout the discussion to revisit or comment on at the end.
- **Don't fear friendly disagreement**. You have gathered everyone here so they can learn from different opinions.
- **Keep individuals from dominating the discussion**. Try to respectfully draw out the quieter members of the group. Start with, "Joe, what do you think about this?"
- **Be part of a larger conversation**. Your job is to guide the discussion, but you needn't be the loudest or most frequently heard voice in the room.
- **Keep things moving**. Always have one eye on the clock and move the conversation to other questions as scheduled.
- **Be flexible**. The conversation may head in a different direction than planned. Just be sure the new direction is equally relevant to the scheduled topic.
- **Embrace knowledge**. Don't be intimidated by those more knowledgeable on the topic than you. They will only enhance the quality of the conversation.

Encourage Conversation

- **Personal reflection or journaling**. Pose a provocative question, then ask the group to spend a few minutes quietly reflecting or writing their response to it.
- **Partner work**. Particularly with a group that has a hard time listening to one another, you might suggest partnering people, giving them a predetermined amount of time (2-5 min) to speak in response to the question at hand. After one person's 2-5 minutes are up, their partner is given equal time to speak while the first speaker becomes the listener.
- **Small groups**. This can be helpful if your group becomes too large or if you have a few dominating voices. Give each group a question to tackle then have each report back to the larger group summarizing their discussion.

5 Exponent Philanthropy Resources

Impact Discussion Guides

Walk through one of these discussion guides with your Peer Circle or provide ahead of time and discuss your answers.

- Why Every Foundation Can and Should Have Impact
- Why Defining your Focus Is Critical
- Good Grantmaking Demands Field Knowledge
- Finding Success Through a Clear Vision and Road Map
- Moving Board and Staff Members to Pursue Impact
- Why Evaluation Is a Key Component in Increasing Your Impact
- Evaluation: What It Is and Isn't
- Making Evaluation Manageable and Meaningful

Primer Topics

Use these primers as topic guides and best practices for Peer Circles around a number of topics

- Proposal review
- Succession Planning
- Trustee compensation
- Mission
- Advocacy
- International grantmaking
- Involving children in philanthropy
- Disaster relief

Toolkits/Assessments

Walk through the self-assessments in this toolkit and work with others peers to make changes or determine next steps.

- Great Funder–Nonprofit Relationships Toolkit
- 10-Minute Impact Assessment
- Ramping Up for High-Impact Philanthropy