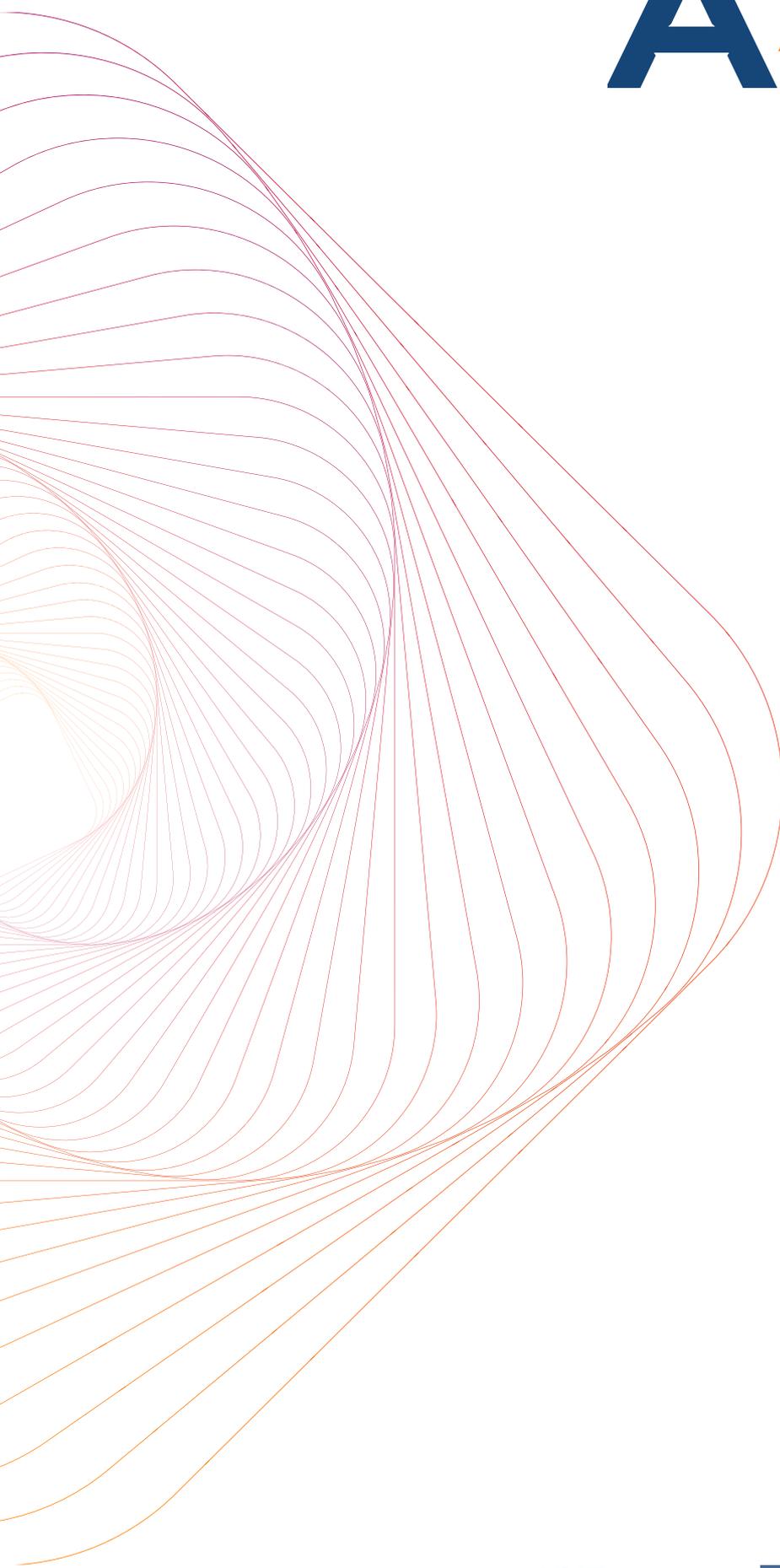


# A GENERATION AHEAD

Helping India's next-generation philanthropists succeed



**HKF**  
HEMENDRA KOTHARI  
FOUNDATION

 **Synergos**  
Global Philanthropists Circle





Hemendra Kothari Foundation, a philanthropic foundation endowed by Hemendra Kothari, works in Education, Health, Wildlife Conservation, Culture and Heritage. With its sister organization, the Wildlife Conservation Trust, HKF has contributed to uplifting poor communities near 128 tiger reserves, parks and sanctuaries across the country. Through education, skills development and health initiatives, HKF complements the massive assistance for protection of vulnerable forest tracts, in collaboration with forest department.



Dasra meaning 'enlightened giving' in Sanskrit, is a pioneering strategic philanthropic organization that aims to transform India where a billion thrive with dignity and equity. Since its inception in 1999, Dasra has accelerated social change by driving collaborative action through powerful partnerships among a trust-based network of stakeholders (corporates, foundations, families, non-profits, social businesses, government and media). Over the years, Dasra has deepened social impact in focused fields that include adolescents, urban sanitation and governance and has built social capital by leading a strategic philanthropy movement in the country.

For more information, visit [www.dasra.org](http://www.dasra.org)



Synergos has 30 years of experience promoting inclusive, collaborative, trust-based approaches to development around the world. Its Global Philanthropists Circle (GPC) helps leading philanthropic families and social investors better use these approaches in their own work in order to increase the impact of their giving.

## Overview of this handbook

In recognizing next-generation philanthropists (NGPs) as the future of philanthropy, this study funded by the Hemendra Kothari Foundation and co-created by Dasra and Synergos uncovers insights to help accelerate NGPs' donor journeys. Our research draws upon the existing corpus of information that has been collected on NGPs in India and globally. This is supported by insights from 20 interviews conducted with next-gen donors and those who work closely with them. Through this handbook, Dasra hopes to help NGPs – especially those starting out on their philanthropic journeys – become more strategic donors. It also wants to encourage and inform conversations among multiple generations involved in philanthropy, and advance the practice of strategic philanthropy.

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## FOREWORD



Philanthropy today has evolved to become much more impact-driven than it has ever been. Some of this evolution I have witnessed within the microcosm of my own family, as decisions around giving transitioned from one generation to the next. Growing up, I saw my father take bold decisions around supporting unfamiliar causes and sectors. For example, when he founded the Wildlife Conservation Trust, there was little awareness in India around wildlife conservation and the sector was in dire need of institutional and financial capacity. I have been very fortunate to have had a first-hand view of his philanthropic style. He trusted and empowered others to build sustainable solutions and organizations, and he did this by lending his expertise, time and wealth. This is the kind of philanthropy I aspire to imbibe and one that I believe our country needs.

India has miles to go on the long, arduous path to achieving the Sustainable Development Goals it has committed to. Currently, we are ranked 117 out of 157 countries on the 17 goals that in 2015 the global community agreed on to create a more sustainable and just world.

Realizing this vision demands collective action and the role of private philanthropy within this cannot be underestimated. Private formal giving in India could potentially reach INR 1500 crore (USD 23 billion) per annum. As a member of the philanthropic community, I feel a sense of responsibility towards ensuring that these funds are channelled in an effective way, always keeping the community at the centre of all our decisions.

Given this context, I believe this study on the role that next-generation givers can play in

strategic philanthropy is timely and necessary. In this handbook, Dasra has neatly captured the insights it gained from conversations with emerging philanthropists who are carving out their individual philanthropic visions while also honouring the legacy of their forebears. Speaking openly about one's philanthropic journey, touching on both challenges and successes, can benefit the community and the sector at large. Additionally, I believe it is important to engage in this discourse now. As next generation philanthropists we have a duty to respond to the needs of our fellow citizens, many of whom struggle to access basics such as education, healthcare and food security. Personally, I am delighted to see that many philanthropists who were interviewed for this study share this commitment to creating an equitable India.

I hope this will encourage you, the reader, to join this important conversation on India's development. I want to thank Synergos and Dasra for partnering with us at the Hemendra Kothari Foundation in putting this handbook together. Most importantly, I want to thank all the interviewees who shared their candid experiences so that as a community we can support each other in this urgent endeavor. I am convinced that we all *will* come together to build a better India.

**Aditi Kothari Desai**  
Hemendra Kothari Foundation



**A** GENERATION  
AHEAD  
Helping India's next-generation philanthropists succeed

# Introduction

The evolution of philanthropy is linked to the evolution of the social issues it strives to address. Each successive generation of philanthropists tackles the need of the era, from gaps in social welfare addressed through donations for schools, hospitals and temples witnessed in the early 20th century to supporting rural development and working to eradicate untouchability in the 1940s and '50s.<sup>1</sup> Philanthropists across ages have taken big bets, funded the underfunded, and piloted innovative programs for the government to scale.

Similar bets need to be taken to tackle the problems of today. India has taken on ambitious challenges with the Sustainable Development Goals aimed at eliminating poverty, protecting the planet and ensuring prosperity for all by 2030.<sup>2</sup> India's complex societal issues coupled with its enormous economic potential create unique opportunities for the country in the next decade. Philanthropists, alongside government and the markets, have an important role in helping transform this country.

Amid all this, the landscape of philanthropy in India is changing as many multi-generational philanthropic families transition responsibility and decision-making power from one generation to the next. India will witness one of the largest

transfers of wealth, close to USD 128 billion, from one generation to the next in the coming decade.<sup>3</sup> In addition, during the first half of this century, there is likely to be 8-10 times more wealth transferred to philanthropy than in the entire 20th century.<sup>4</sup> The majority of this wealth will be managed by family offices, and a portion will be diverted towards charitable and philanthropic activities through family trusts and foundations.

Yet there is a gap in data on the next-generation philanthropists (NGPs) of India. NGPs are a very heterogeneous group; they are at different stages of giving, involved to different degrees in philanthropy and have different perceptions of their levels of engagement. As members of multi-generational philanthropic families, most NGPs have been exposed to some form of philanthropy from a very young age. Many feel a strong sense of duty to sustain and build upon both, the businesses and the philanthropy of their forefathers.

As NGPs set out to respond to the needs of modern society, it is critical to recognize the huge influence they will have over how impact is driven in the development sector. This in turn means a greater responsibility on NGPs to make social investments thoughtfully and intentionally.<sup>5</sup>

# A closer look at Next Generation Philanthropists in India

## What defines next generation philanthropists?

Belong to multigenerational philanthropic families

Are deeply influenced by their family's culture of giving

## What inspires them & influences their decisions?

A respect for their legacy and a drive to honor it

A heightened sensitivity to social inequities

A sense of duty to society

A network of peers and mentors

## How do they approach philanthropy?

Are more hands-on

Want to invest in solutions that create systemic change

Are keen on employing innovative investment instruments

Aim to create more structure and focus for their family foundations

Are impact driven and have an enthusiasm for scale

\*This map is representational

## Defining NGPs in India

Next Generation Philanthropists (NGPs) belong to multi-generational philanthropic families. These families are currently engaged in some form of giving, be it traditional philanthropy or more structured philanthropy, and have been giving for two or more generations. NGPs' passion for philanthropy has been nurtured by their grandparents and parents, who created a culture of giving in the family.

"In addition," says Hari Menon at the Bill and Melinda Gates Foundation, "many of the next generation of India's traditional wealthy families have been educated abroad and have imbibed some of the concepts of Western philanthropy, such as having measurable goals and wanting to focus their work on systemic impact. Many are driving such conversations in their families when they come back."<sup>6</sup>



"Giving has been ingrained in our DNA. My great-grandfather and great-grandmother devoted their entire lives to philanthropic activities in Palanpur, Gujarat. My grandparents have continued the tradition and so have my parents. I grew up in a culture where giving is a very big thing."

**Shloka Mehta**  
Rosy Blue Foundation

In this section we examine the characteristics of NGPs – what motivates them to pursue philanthropy, whose advice they seek on where and how to give, and how they typically approach giving.

**What inspires NGPs to give?**

**Whose advice do NGPs seek to plan their giving?**

**How do NGPs approach giving?**

## What inspires NGPs to give?



Next Generation Philanthropists have been exposed to some form of philanthropy throughout their lives. Shaped by the values of generations before them, many credit their grandparents and parents for instilling in them a sense of duty to society. NGPs also feel responsible to their forebears as custodians of the family legacy. Lastly, they are driven by a heightened sensitivity to social inequities in the country. “Next-gen donors are very respectful of the legacy of previous generations, much more so than we expect,” says Sharna Goldseker, Founder of 21/64, an organization that provides advisory, facilitation and training services for NGPs.



### A sense of duty to society

“It is a responsibility that when you have, you have to give. It is about reminding people to use their position of privilege not just to feel generous but to do what you have to do.”

**Trishya Screwvala**

Raindancer & The Lighthouse Project



### Honoring family legacy

“I definitely want to continue and grow what my parents have started. It is something that we have been very emotionally involved in as a family; honoring the legacy is very important.”

**Ayushi Patni**

RAAY - Amit Patni Family Office



## Whose advice do NGPs seek to plan their giving?

As inheritors of a family legacy, NGPs are influenced by their families in their giving. Outside this, NGPs consult their peers and mentors to discover newer approaches to social impact.



### Family

“As a family, the value of multiple voices and varied experiences, when channelled in an objective and professional manner, has come through many times during our decision-making. The foundation has been a stepping stone for each family member to understand what is closest to them.”

**Amira Shah Chhabra**

Harish & Bina Shah Foundation



### Peers

“A large influence for the Next-Gen seems to be peers. If one group is working with a certain organization or a certain sector, then it influences others to also give. There is a domino effect.”

**Noshir Dadrawala**

Centre for Advancement of Philanthropy



### Mentors

“Having mentors very early on helped me go beyond my comfort zone. Every time I speak with a mentor, formally or informally, I come back with a better understanding that has incrementally added to where I am today.”

**Leena Dandekar**  
Raintree Foundation

## How do NGPs approach giving?

Next-gen philanthropists seek to build on the groundwork developed by the earlier generation. To a large extent, this involves bringing more structure and focus to their family foundations through processes, technology and accountability. As philanthropy evolves to respond to the needs of the time, NGPs bring in a fresh perspective to their families’ legacies, expanding the scope of family foundations, which includes giving to both newer sectors and newer kinds of social impact ventures.



### Structure and focus

“We narrowed our focus because we realized we can’t work on everything – just as in business, where you can’t be all things to all people, so in philanthropy, you have to pick the area where you think you can have the most impact and work there.”

**Sonal Sachdev Patel**  
GMSP Foundation



### Fresh perspective

“In the US, family foundations have reinvented themselves to create a culture that attracts the best talent. NGPs in India have to similarly create aspirational institutions.”

**Riah Forbes**  
Forbes Marshall Foundation



### Expanding the scope

“NGPs often want to be more hands-on, and look for opportunities to go beyond just writing cheques. They are also open to exploring a gamut of investment instruments, including grant making, impact investing and crowd-funding.”

**Arnav Kapur**  
Bill & Melinda Gates Foundation

Just as their forebears supported underfunded areas in their time, this generation is supporting progressive causes such as political rights, advocacy and the environment.<sup>7</sup> “I see philanthropy as extreme risk capital. The good thing about philanthropy is that if you spend money on something and it does not work, you can write it off,” explains Nandan Nilekani, who is not himself an NGP but is often held up as an example of evolved giving by new and multi-generational givers alike. “You’re not answerable to anyone, it is your money. That’s not true of government money, that’s not true of market money. I think, therefore, philanthropy should go where no one else can go.”<sup>8</sup>

In the next section, we hear from NGPs on the challenges they have faced in giving more strategically. Although NGPs are a fairly heterogeneous group, they tend to have some shared experiences whose key themes we have identified.

# Roadblocks to unlocking potential

As a group, NGPs are very heterogeneous and are at different stages in their philanthropic journeys. Some have been involved in their family foundations long enough to be able to lead initiatives, while others are fairly new to the space and are discovering their sectors of interest. As with all endeavors that are new and different, NGPs have expressed challenges in giving more strategically. In the following section, we have listed out some of these challenges.

Wealth, inheritance and giving as a family

Accessibility and quality of information

Sector-specific challenges and capacity deficit

## 1. Wealth, inheritance and giving as a family

In India, different families with legacies of giving are at different stages of transitioning roles to the next generation. While some family elders are ready to take a step back and give the new generation the opportunity to lead, many NGPs face an indefinite period of shift where decision-making power is limited or decisions require consensus. To this extent, the nature of the inheritance can be a challenge for NGPs.



### Wealth and inheritance

“If you are a next-gen giver, chances are a lot of the wealth that you are trying to give away has come to you as inheritance – you have not worked for it, and the people who have actually made that money will want to see what they are giving to. They are okay to give the money, but it has to show value, be it a social return on investment or some other kind of impact.”

**Shloka Mehta**  
Rosy Blue Foundation

## 2. Accessibility and quality of information

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NGPs aiming to be strategic in their giving often speak of not knowing where to find information that can guide them. Where they do exist, they find them too generic to suit their particular goals or too academic. Also, resources currently available to assist high net worth donors in practising effective philanthropy vary widely in quality and are not readily accessible.<sup>9</sup>

It does not help that in India, data on the impact of many development programs is limited and NGOs have not adequately invested in monitoring and evaluation mechanisms. Insufficient information means that often selection of areas for philanthropic giving can be primarily based on personal experience and beliefs rather than on a detailed analysis of gaps, strategic fit and potential intervention strategies.<sup>10,11</sup>



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### Accessibility of information

“There are so many platforms out there that are trying to get good information to donors and future donors. But the true challenge is how to encourage givers to access and use this information, to take time to understand what is really needed on the ground, and who else is already doing good work in their area of interest. Unfortunately, a lot of times, people don't see value in using these platforms. There's a disconnect between sector professionals trying to unlock more giving and the givers themselves who may, for example, not want to pay for or spend significant time on donor education courses or other knowledge and network platforms”

**Katarina Czarniak**  
Synergos

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## 3. Sector-specific challenges and capacity deficit

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In India, the social sector itself can be a challenge in terms of which NGOs are considered credible and impactful. The hesitation to entrust money to NGOs is partly due to perceptions regarding their lack of professionalism. Possibly as a result of this, many Indian philanthropists prefer to operate their own programs rather than work collaboratively.<sup>12</sup> One study found that in India in 2010, two-thirds of private foundation funding went to their own operational activities and only one-third as grants to other organizations.<sup>13</sup> We also find that a heightened, sometimes unnecessary, focus on reporting and scale becomes a bottleneck when giving to grassroots organizations doing urgent work. Other key barriers are challenges in finding capable staff and sufficient infrastructure.<sup>14</sup>



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### Sector-specific challenges

“Deploying funds to NGOs is often challenging, because one expects financial accountability and regular updates on programs being supported. On the receiving end, organizations need to become more mindful of operating professionally while on the giving end, individuals, foundations and CSR firms need to realize that this cannot happen without supporting costs for people and systems.”

**Amira Shah Chhabra**  
Harish & Bina Shah Foundation

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### Capacity deficit

“Getting good people is very difficult. For example, I have a program right now that I am trying to develop and we have been looking for over a year for someone who can take it and run with it.”

**Shruti Shibulal**  
Tamara Leisure Experiences Pvt. Ltd.

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# Best practices from experienced NGPs

Next-gen philanthropists are part of a progressive generation that seeks cutting edge solutions while also balancing their family legacies. Managing these sometimes opposing ideas can be a daunting task, but NGPs are perfectly poised to take on this challenge. Having witnessed inspiring acts of philanthropy from a very young age, they have the significant advantage of having started early. They have had the liberty of time to think about their identities, motivations and philanthropic styles. Next-gen givers are also connected to a global community that exposes them to a multitude of ideas, values and real-time information about the world's most pressing needs.

Additionally, with the Indian development sector becoming more professional and givers becoming more socially conscious, the lines between philanthropy and business are blurring. Within this context, numerous NGPs are approaching philanthropy with vigour and working to create lasting social impact in innovative ways. In this section, we outline some of the successful strategies and solutions that the cohort has employed as they aspire to create transformational change.

Redefine philanthropy together as a family

Start small, stay informed

Leverage business ethos for philanthropy

Approach philanthropy as a partnership

## 1. Redefine philanthropy together as a family

For philanthropic families, the transition of decision-making and wealth can be a critical and challenging period. Given that respect for and deference to elders is a core family value in India, conversations to redefine philanthropy for the family can be difficult for NGPs to initiate. But this is also a great opportunity to drive discussions, align multi-generational values, and create an institution that embodies the family's ideals for generations to come. Next-gen philanthropist Sapphira Goradia says, "It can be helpful to sit down and individually come up with a list of your most important values, then share these lists as a family. More often than not, you will find more commonalities in values than differences. This can be a tool to build cohesiveness and a starting point to work together on philanthropy as a family. Dasra's Philanthropy Guide, 'Giving as a Family' outlines key factors to help philanthropists examine how they would like to approach philanthropy as a family.

NGPs may find it challenging to explore their own identities during this period of transition, especially when their interests may differ from those of the family legacy. Says Julita Eleveld, Bill and Melinda Gates Foundation, “Next-generation philanthropists may feel more confident taking on responsibility by exploring questions such as, ‘How do you manage your family expectations with who you are?’ and ‘How do you manage your family values if they are very different from what you believe in?’ and then discussing them with their families”. NGPs have found that meaningful debate and discussion with their families can help drive consensus among members. Using research and involving mentors in the discussion helps alleviate the apprehensions from older members that usually accompany new ideas. Another approach to family giving is to create separate pools of funds, allowing families to give together where there is agreement and independently where there are diverging interests.

## ➤ Redefining ‘legacy’ - Shloka Mehta

On completing her studies abroad, Shloka Mehta returned to India aspiring to create impact in the education sector. She found that the Rosy Blue Foundation, the philanthropic arm of the Rosy Blue Group that her family owned, had tremendous scope to become more effective. “From my previous experiences in volunteering with NGOs, I was very frustrated by how affected organizations are by the grants they receive,” she says. “A lot of organizations typically change their program to accommodate or follow the mandate of a certain grant. Funding sometimes seemed to be a huge limitation. We had tools like the Rosy Blue Foundation but no one was solely managing it or recording and measuring its impact, so I volunteered for the position because I knew the foundation had greater potential.” Today, as Executive Director of Rosy Blue Foundation, Shloka supports NGOs and initiatives that promote mentorship for underprivileged children in India. She has also been instrumental in setting up ConnectFor – a volunteering platform that links people willing to give their time and skills with credible NGOs.

For the first three months as Executive Director, Shloka focused on conducting research on philanthropy and grant-making to answer questions such as, “What does philanthropy mean? How should grant givers assess implementing organizations?” She met NGOs to understand their programs and intermediaries such as Dasra to decide what sector to focus on and how to create meaningful impact. She leveraged this information to create a theory of change for the Foundation. She also highlighted the importance of research as part of the grant-making process and outlined new structures that were needed for the foundation to become a more efficient funding agency.

She says this would not, however, have been possible without the support of her family. Shloka had formal and informal discussions with her family to bring them on board, relying on evidence to help her family view their funding more objectively. “We realized that giving shouldn’t only be motivated by our desire to help people meet their needs, but that the value of what we want to give can become much more sustainable if we do it right,” says Russell Mehta, Shloka’s father. “By conducting research, we saw that our impact could lead to greater change than anything ad hoc.”





## 2. Start small, stay informed

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Emerging NGPs face the often daunting task of continuing their family legacy while also creating their own giving identity. As they embark on this journey, they encounter questions such as, “How can I align my motivations with those of the previous generation? Will I be able to give sufficient time to this endeavour? Am I carrying out my philanthropy in the most impactful manner?”

To address this, evolved givers have found it useful to start small and educate themselves by engaging with intermediaries and field experts. The development sector has seen the rise of intermediary organizations that undertake research, advisory and consulting assignments. These organizations offer NGPs guides, reports, structured workshops, giving circles and immersion experiences. Also, in recent years, the development sector narrative has become more mainstream, resulting in the rise of print and online platforms dedicated to discussing critical issues, opportunities and creative solutions within the sector. Finally, collaborative global platforms create safe spaces, help NGPs interact with more evolved givers and encourage knowledge sharing across borders.

Collaborative action will be key to meeting India’s development goals, which require large amounts of sustained funding that is beyond the scope of individual donors. Collaboration is more than just funding – it also includes cross-learning, sharing best practices and ensuring alignment on outcomes to create enduring impact. Says Amira Shah Chhabra, “One approach is to identify other funders and connect with them beforehand. While doing a reference check with another funder recently, we benefited from understanding each other’s perspective on the organization – this directly impacted our thoughts on the funding, mainly in terms of how it can become even more effective.” While examples of such collaborative action are few, it is imperative that NGPs make the most of these existing platforms while fostering new alliances.

Although not exhaustive, on the next page is a list of some India-specific and global organizations that can be a first point of reference for emerging and evolved philanthropists.

# Resources

## Publications

**Generation Impact: How Next Gen Donors Are Revolutionizing Giving** is a book by Sharna Goldsekar of 21/64 and Micheal Moody. They present extensive first-hand accounts and expert analysis of the hands-on, boundary pushing, unconventional strategies that next-gen donors are beginning to pursue.

**Philanthropy guides** by organizations such as Dasra and Rockefeller Philanthropy Advisors are light, easily absorbable manuals designed to introduce philanthropists to the world of thoughtful and effective philanthropy.

**Bain India Philanthropy Report** is a knowledge series focused on major trends in the philanthropic sector in India. In its latest edition, IPR 2018, a collaborative effort by Dasra and Bain, focuses on mindsets and behaviors that have enabled philanthropists to achieve their full philanthropic potential.

## Intermediary organizations providing services to enable strategic giving:

**GiveIndia, GuideStar India and Charities Aid Foundation** can provide compliance and diligence checks on non-profit organizations.

**Dasra** provides consolidated services that help philanthropists be more strategic in their giving. By forming partnerships with givers and social enterprises, Dasra enables philanthropists to articulate a clear vision, define key outcomes with chosen grantees, and measure the effectiveness of their philanthropy cumulatively across projects.

**Centre for Advancement of Philanthropy** and other organizations provide philanthropic advisory and management services with a focus on engaging with companies to improve their CSR programs.

## Knowledge platforms

**India Development Review** is an independent online knowledge platform for leaders in the development community that focuses on India.

**Stanford Social Innovation Review** is a leading global platform with a range of articles on development issues and sector innovations.

**Giving Compass** is an online repository of vetted content to help philanthropists give better.

## Philanthropy platforms fostering collaboration:

**Business networks** such as Young Presidents' Organisation Next Generation (YPONextGen) and Confederation of Indian Industry (CII) offer opportunities to engage with peer philanthropists and philanthropy partners.

**Dasra Philanthropy Program** brings together a community of passionate and committed philanthropists to undertake a collective learning experience helping them brainstorm on how they can collaboratively deepen impact at a sector level.

**Synergos Global Philanthropist Circle** is a community of leading philanthropic families and social investors that aims to increase the impact of members' philanthropy, and enables them to become more effective social investors by offering opportunities for learning and collaboration.

**Nextgendonors Retreat**, an initiative by 21/64, an organization founded by next-gen philanthropist Sharna Goldsekar, is aimed at next-gen donors who are or will be stepping into decision-making roles within their families and want to clarify their philanthropic values, identity and direction.

**The Philanthropy Workshop** uses educational programs and leverages its diverse network to bring together philanthropists from around the world who are committed to lasting, positive change.

**AVPN** is a unique funders' network based in Singapore, committed to building a vibrant and high-impact philanthropy and social investment community across Asia. It looks to break down silos and encourages collaboration across sectors to improve effectiveness of members across Asia.

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We are happy to connect with you one-on-one and offer the most suitable options - both at Dasra and beyond - for your consideration. To explore further, please contact [strategicphilanthropy@dasra.org](mailto:strategicphilanthropy@dasra.org).

### 3. Leverage business ethos for philanthropy

After the Companies Act, 2013, many family-owned businesses have set up foundations that are at times also used to deploy personal wealth for philanthropy. More evolved NGPs have established tight governance structures, and are adopting successful business practices to create a dynamic culture of giving and a positive work environment. Says next-gen philanthropist Jalaj Dani, “Philanthropy is as important and as serious as running your own business; I think you need a lot of operating discipline. If you have certain processes, values and methods that have made you successful in business – you need to bring those to your philanthropy and integrate the same with your ethos and conscience.”

Some of these practices include employing professionals to run foundations, creating robust processes for due diligence of grants and measurement of impact, and partnering with community-based organizations for geographic expansion. However, NGPs should be cautious when replicating structures and mindsets, as the objectives and philosophical underpinnings of philanthropy are not the same as those of business.<sup>15</sup>

#### ➤ Philanthropy driven by professionalism - Chetan Mehrotra



Chetan Mehrotra is looking to improve the quality of education and healthcare in India through the projects of two family trusts, Sar-La Education Trust and Radha Mohan Mehrotra Medical Relief Trust. The third generation of a philanthropic family, Chetan embodies the spirit seen in next-gen givers to move beyond mere cheque-writing. “Earlier, our philanthropy was more of a proprietorship where one person took decisions on how much to give and whom to give to. Today, we are putting systems in place and looking to hire professionals to ensure transparency and need-based allocation. We seek guidance from intermediary organizations and collaborate with professionals,” he says.

Early in his giving journey, Chetan realized he needed the help of experts to maximize impact. Apart from speaking to seasoned professionals, he also visited several non-profits to understand their ground realities. After conducting a needs-based analysis, he concluded that ensuring quality education and healthcare for young people creates a ripple effect within communities and decided to focus on these areas. He initiated projects to address issues holistically, including those in pediatric care and adolescent education. When choosing an implementation site for his project, Chetan went out of his comfort zone to choose locations where impact could be high. He draws on his management experience of 30 years to ensure effective monitoring and has instituted quarterly third-party assessments for all projects. “The focus is to create impact at the right place and ensure quality over quantity. For philanthropy to create meaningful change, it needs to be driven by passion, professionalism, a hunger for impact, and an appetite for learning,” he says.

## 4. Approach philanthropy as a partnership

Our interviewees have highlighted the importance of developing partnerships with NGOs to amplify impact. The power differential between philanthropists and NGOs can sometimes lead NGOs to stray from their vision in order to appease a funder, which in turn limits impact. Given their hands-on approach, evolved NGPs are open to examining the donor-grantee relationship that has shaped some models of philanthropy over the years. They have found that successful donor-grantee relationships are based on open communication, mutual respect and trust.<sup>16</sup> Such relationships acknowledge the boundary where the funder's knowledge ends and the grantee's expertise begins.<sup>17</sup>

For an NGP who has inherited a legacy of grantees, it is important to maintain a common set of values that guides organization selection. Parameters such as alignment in long-term vision, enthusiasm for scale, and definitions of impact must be discussed to ensure a long and fruitful engagement. This is also a great opportunity for donors to maximize their impact by investing in capacity building of the organizations.

### > Evolving from a funder to a partner - Rajvi Mariwala

Armed with first-hand experience in the development sector and an MBA focusing on social entrepreneurship, Rajvi Mariwala adopts an entrepreneurial approach with the Mariwala Health Initiative (MHI), one of the few philanthropic initiatives in India focusing on mental health. She conducted extensive research to understand the essentials for building a mental health ecosystem and has supported underfunded areas such as mental health rights. Under Rajvi's leadership, MHI has a very clear strategy that focuses on scalable and sustainable solutions. Asked about her vision for MHI, she says, "I want to make MHI one of the top mental health funding organizations in the country. We want to create a holistic and universally accessible mental health ecosystem, encourage sharing of best practices, and develop robust monitoring and evaluation practices."

Rajvi believes philanthropists can and should play a larger role in helping the development sector grow. For instance, creating publicly available and user-friendly grant process documentation could help organizations in a big way. MHI goes to significant lengths to ensure that all organizations are assessed in a fair and transparent manner for grants. Rajvi recognizes that there are shortcomings in the development sector – especially in documentation, reporting and leadership – but says philanthropists should approach every funding opportunity as a partnership and get involved beyond merely making a donation. "Capacity building for whoever you work with is something all philanthropists must contribute to. For instance, as we develop monitoring and evaluation tools for MHI, we also work to develop M&E tools for our partner organizations," she says.

Shruti Chakravarty, Chief Advisor for MHI, says the Mariwalas' willingness to listen to voices from the field is one of the key reasons for MHI's effectiveness. "Mr. Mariwala and Rajvi started a process they called 'insighting', in which they spoke to a range of people who were users or stakeholders, and then based on that, created their model of philanthropy," she says. "This could be one way to go about philanthropy – listening to your stakeholders and using data to inform yourself."



# From Barriers to Opportunities



## ➤ Roadblocks to unlocking potential

### Transitioning wealth and decision-making roles to the next generation.

While some family elders are ready to take a step back and give the new generation the opportunity to lead, many NGPs face an indefinite period of shift when decision-making power is limited or decisions require consensus

### Lack of information to help donors maximize impact

NGPs often speak of not knowing where to find information that can guide them. If the information does exist, it varies widely in quality, is not readily accessible and is usually too generic or academic to help them plan their goals

### Sector specific challenges and capacity deficit

With over 31 lakh NGOs registered in India, it is challenging to know which NGOs are considered credible and impactful. Hence many philanthropists operate their own programs rather than work collaboratively



## ➤ Best practices from experienced NGPs

### Redefine philanthropy together as a family

Create consensus in the family by introducing new ideas and approaches using research or involving mentors and sector experts to alleviate the apprehensions of older members

### Start small, stay informed

Engage with intermediaries that offer knowledge products, structured workshops, giving circles and immersion experiences to familiarize yourself with critical issues, opportunities and creative solutions in the sector

### Leverage business ethos for philanthropy

Adopt tight governance structures and successful business practices such as employing professionals from the sector, creating robust processes for due diligence of grants and measurement of impact to create a dynamic culture of giving

### Approach philanthropy as a partnership

Acknowledge an NGO's expertise, help them build capacity in areas that need improvement and promote open communication for long and effective partnerships

# Conclusion

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Philanthropy in India is in the midst of a generational shift. Like those who preceded them, Next Generation Philanthropists will be instrumental in taking the sector to greater heights. Keeping this theme at the center, our study aims to guide next-gen givers, create a sense of community and urges them to reflect on meaningful ways to create social impact.

Our study identified next generation philanthropists as enthusiastic doers motivated by a sense of duty to society. They are proud of and keen to honour their family legacy. They approach philanthropy with the same mindsets that they use for their businesses, and want to fund research-driven solutions. They grapple with periods of transition both in business and philanthropy and balance being more deliberate in their giving with the nuances of the development sector.

Negotiating these challenges is not easy, but some next generation philanthropists have crafted solutions that have made them more effective givers. Next generation givers are creating consensus within their families by leveraging sectoral research. Furthermore, by acknowledging that some family members may need time to assimilate new ideas and by empathizing with their ideologies, they are upholding their family legacies while also becoming more dynamic doers. Evolved givers have realized that many of these barriers can be tackled head-on by starting small and consulting intermediaries and sector experts. Collaborating with peers and establishing good governance structures for their philanthropy has helped the next generation become more efficient. Most importantly, next generation philanthropists are approaching philanthropy as partnerships, creating transparent due diligence processes and building capacity within NGOs.

Through this study, we want to initiate a dialogue on strategic philanthropy among next-gen givers. The scale and complexity of India's development challenges today creates an urgent need for newer approaches to philanthropy to maximize the impact of every rupee. India needs its next generation philanthropists to be thought leaders who will go that extra mile to invest in solving social problems sustainably. We hope this handbook can be a starting point for them to reflect on their own giving journeys and build a community of informed givers.

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