



Centre for
Social Impact
and Philanthropy



Enabling Philanthropy and Social Impact in India

State of the Support Ecosystem





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and Philanthropy



WINGS
WORLDWIDE INITIATIVES
FOR GRANTMAKER SUPPORT

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Acknowledgements

This study is an ambitious endeavour that would not have been possible without the invaluable support of many organisations and individuals. We are grateful to our partner Worldwide Initiative for Grantmaker Support (WINGS) for their commitment to strengthening the ecosystem of support for philanthropy and social impact in India. Their inputs have been instrumental in the conceptualisation of this study. We'd also like to recognise their generous contribution towards the design and dissemination of this report.

The scope of this study demanded rigorous inputs from nonprofit organisations working across the range of issues, geographies, and sizes. Given the challenging task at hand, we have been extremely fortunate to have

GuideStar India as our data collection partner. Their dedicated efforts, along with those of their local data partners, ensured that we received responses from nonprofit organisations across all 29 states in India, including the small, grassroots-focused ones working in remote, resource-constrained districts.

We would like to thank all the nonprofit organisations and foundations who took the time to share their inputs on the nature of support they find useful and that they presently use.

Lastly, we would like to thank Worldwide Initiative for Grantmaker Support (WINGS) India Advisory Group and the Centre's Advisory Council for their timely and invaluable insights throughout the various stages of this research.

Centre for Social Impact and Philanthropy

The Centre for Social Impact and Philanthropy at Ashoka University is India's first academic centre focused on enabling strategic and robust philanthropy towards greater social impact. It informs sector strategy through credible research and data, convenes platforms for norm-setting and collaborative learning, and offers programmes that strengthen civil society capability and sustainability. Learn more about the Centre at csip.ashoka.edu.in

Worldwide Initiatives for Grantmaker Support

WINGS is a network of more than 100 philanthropy associations, networks, academics and support organizations in 40+ countries around the world whose purpose is to strengthen, promote and provide leadership on the development of philanthropy and social investment. Learn more about philanthropy development at www.wingsweb.org.



Preface

Strategic use of ever unpredictable financial resources. Lean yet nimble teams, structured to facilitate overall achievement of goals. Collaborations that prioritise knowledge, learning, and making interventions. An encouraging sector environment. Trust, transparency and communication among all stakeholders. These are necessary elements in commonly-held visions of effective social impact and philanthropy sectors, that utilise their shrinking resources well, proactively engage with their social, political and economic world and constantly innovate.

The reality of India's social impact and philanthropy sectors, however, could not be further removed from this vision. Stuck in the pressures of sheer survival, saddled with a complex regulatory landscape and a challenging socio-political context, our vision for the social impact and philanthropy sectors has become a receding horizon, instead of a guiding compass.

An average NGO in India can just about keep itself afloat and also implement its interventions. Making sense of the regulatory landscape is often daunting, as there is limited accessible knowledge on the exact processes and requirements involved. The fear of non-compliance looms large. Functioning thusly in isolated islands, collaboration among NGOs and potential funders are few and far between. Much of the financial resources trickling into the nonprofit sector are utilised in reinventing the wheel. For instance, similar interventions are frequently implemented either in old school modes or in untested, new ones (mobile applications are one example) by multiple organisations. Newer ways of fundraising and engaging different strata of society barely reach the NGOs working at the grassroots level. Innovations from the field, on the other hand, often remain unheard of by the

sector at large. And further, focus on shaping the sectors as a whole is rare.

Stepping out of this quagmire is urgent. As a first step, both philanthropy and social impact sectors need to realise that a proactive use of the 'support ecosystem' is the need of the hour. Organisations that provide the skills, knowledge and platforms for NGOs and foundations need to grow at pace with the social impact and philanthropy sectors. Anecdotal evidence from sector experts currently suggests that this is not the case; however, it should be noted that there has so far been limited systematic exploration of the support ecosystem.

To address these lacunae and as part of its mandate to build data on sector-wide issues, Centre for Social Impact and Philanthropy (CSIP) at Ashoka University undertook this study in collaboration with Worldwide Initiatives for Grantmaker Support (WINGS) and GuideStar India to explore some aspects of the support ecosystem in India.

We hope that the research questions and findings of this study start a conversation on how to build and access the support ecosystem. The survival mode in which the social impact and philanthropy sectors have been operating impacts their uptake of support services. This catch-22 situation calls for a structural shift. Whether that comes through reimagining the terms on which funding is provided to these sectors, or by dedicating resources to develop a cadre of support service providers, remains to be explored. We look forward to participating in such conversations and solutions.

Key Takeaways



In short, the value and uptake of the 'support ecosystem' is very poor in the Indian social impact and philanthropy sectors. Sector stakeholders need to work in partnership to build a strong support ecosystem. We propose a strategy defined by 3 As.

The social impact and philanthropy sectors in India are growing in scale and ambition. To sustain the dynamism fuelling this growth, support services in key areas of organisation-building and sector development—such as fundraising, capacity building and sector governance, among a range of others—are critical in order to plug gaps in internal capacities, as well as to facilitate access to cutting-edge resources and newer technologies.

But, at the present moment, do NGOs and foundations find support services useful? Do they use these services? Are support service providers present across India?

Key takeaways from our study:

- NGOs and foundations find very few support services useful, and fewer still are actually used.
- The current support service ecosystem is inadequate on the national level, as most support service providers are largely concentrated in Maharashtra, Delhi and Tamil Nadu.



Awareness

Awareness about 'support services' and their value-add to the work done by NGOs and foundations needs to be enhanced.



Availability

Availability of support services across the country needs to be improved through an increase in investments in the support ecosystem. In the interim period, existing support service providers need to make their service listings available outside their immediate areas of operation.



Accessibility

Accessibility of support services also needs to be enhanced, which will involve provision of support services specific to the needs of NGOs and foundations, at the right price points, locations and time periods.



Executive Summary

A 'support ecosystem'¹ consists of organisations and individuals that provide critical, core services to the social impact and philanthropy sectors. These services could be in operational areas such as programme and grant management, functional areas such as monitoring and evaluation, or sectoral areas such as sector governance. Most NGOs and foundations want for capacities in one or more of these areas, yet lack adequate channels to use these services. By its very nature, a strong support ecosystem, therefore, can make the social impact and philanthropy sectors more effective, strategic and sustainable in their work.

While these sectors have acknowledged the lack of a support ecosystem in India, there is little data on its current state—specifically, on the support services that are available and the levels to which they are accessible among NGOs and foundations. This report examines the current state of the support ecosystem, specifically mapping the 'usefulness' and 'use' of support services among NGOs and foundations² in India.

The study uses primary data collected through a digital survey, in partnership with GuideStar India, of 800 Non-Governmental Organisations (NGOs) and 67 philanthropic foundations, located in 29 states and working across 16 thematic areas. The study sample is broadly representative of NGOs and foundations located across states and also represents prominent thematic areas of work among NGOs.

Overall, the results of the study suggest extremely low levels of usefulness and use of support services. For instance, although organisational capacity building scored as the most popular service used by NGOs, only 37 percent of the NGOs in our sample indicated that they use this service. Similarly, only 30 percent of the foundations surveyed use programme/grant/strategic advisory services, the most popular service category among foundations. The measured usefulness of support services across the 20 service categories selected for the study is fragmented and weak. The study also highlights that the geographic spread of support service providers is concentrated, limited to only a few states.

We hope this study sparks a conversation among relevant stakeholders on building the support ecosystem and that growing investments in Indian philanthropy will also be channelled towards developing this field.

¹We borrow the definition of 'support ecosystem' from 'Worldwide Initiatives for Grantmaker Support' (WINGS). The term 'ecosystem of support' is also frequently used.

²For the purpose of this study, the social impact sector consists of NGOs and the philanthropy sector consists of philanthropic foundations.

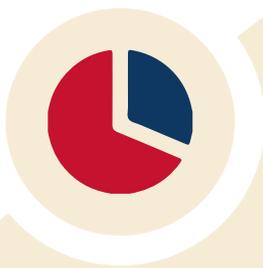
01

As a composite category, support services are useful to both NGOs and foundations. More NGOs find them useful than foundations. Across categories, usefulness of support services for both NGOs and foundations is fragmented and weak.



02

Approximately, only one-third of the sampled NGOs and foundations use any of the support service categories. Overall, more NGOs use support services than foundations.



Key

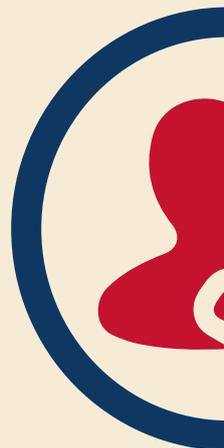
03

In each service category, use of services measures lower than their usefulness, though the margin of difference varies significantly across categories. The service categories that score the highest in both use and usefulness among NGOs and foundations pertain to core organisational support services.



04

Approximately, only one-third of the sampled NGOs and foundations use a support service that they find useful. At an aggregate level, more NGOs use services they find useful than foundations. This is with specific reference to a small subset in the sample that both finds a service useful and uses it.



Findings



05

Overall, the gap between measures of usefulness and use of support services, while prominent, is not enormous. The largest gap is in 'fundraising' services, specifically, 21% for NGOs and 35% for foundations.



06

Irrespective of thematic areas, there are at least some support services which are consistently being used. Therefore, overall use of support services is not dependent on thematic areas of work.



07

Some support services are being utilised by, both, NGOs and foundations, irrespective of the operating budget category to which they belonged. However, the extent to which support services are used varied widely across service categories and operating budget.



08

Support service providers are largely concentrated in a few states, such as Maharashtra, Tamil Nadu and Delhi.



09

The strong presence of NGOs and foundations in a particular area is not a reliable indicator of an equally prominent presence of support service providers. As you would expect, however, areas where the presence of NGOs and foundations is weaker seems to indicate a similarly weaker presence of support service providers.



1. Introduction

The social impact and philanthropy sectors in India have evolved significantly in the last two decades. The sectors have become more professionalised and ambitious in the kind of impact they seek to create. New organisational forms for undertaking social impact work and philanthropic giving have emerged, with an emphasis on scale, efficiency, return on capital and impact measurement. However, the development of the support ecosystem has failed to keep pace.

'Support ecosystem'³ here refers to organisations and individuals which together make the social impact and philanthropy sectors more effective, strategic and sustainable in their work. Such an ecosystem provides both core organisational support services (such as organisational capacity building, grant and strategic advisory, etc.) as well as functional support services (such as financial, tax and audit, and fundraising). A support ecosystem also provides sector advancement services such as advocacy and governance for the sector, services that promote the culture of giving among the larger public, etc. Information and knowledge that helps build the identity of and narratives about the sector also may come from the support ecosystem.

Organisations in the social impact and philanthropy sectors constantly grapple with challenges of scale, sustainability and effectiveness. These include: small organisational sizes, limited and unpredictable fund flows, poor understanding of priority areas for funding, and the sheer complexity and resource intensity demanded by programmatic interventions. In the absence of an adequate support ecosystem, social impact and philanthropy organisations are less likely to overcome these structural challenges. For example, fundraising support to NGOs can significantly increase their financial base; but in

the absence of fundraising service providers, NGOs are less likely to be aware of and value the impact of professional assistance in this area. Similarly, a philanthropist running a foundation might be keen to contribute to the development of the sector through time and money, but might not know where to invest the funds for maximum impact.

The presence of a support ecosystem, therefore, can contribute to overcoming major challenges facing these sectors. Some of these challenges have frequently been noted as those to do with weak organisational structures, poorly designed and implemented interventions, lack of evidence-based decision-making, unresponsive policy and regulatory environment, and an overall apologetic and contradictory narrative on the sector. For the social impact and philanthropy sectors to achieve their highest potential, a support ecosystem is therefore essential.

Agent of Change: A Robust Support Ecosystem

In India, as globally, the need for a support ecosystem for social impact and philanthropy sectors is not well-understood and hence remains under-invested. There have been few attempts to understand the state of the support ecosystem's development.

In the Indian context, broadly two areas of enquiry have been pursued so far. The first one focuses on understanding organisations that have historically played this role (see Sundar, 2017)⁴ and the second focuses on developing a list of support service providers across various support categories (see Dasra, 2016)⁵. Recent international writings on the support ecosystem have commented on the declining trend in funding for support services (see Foundation Centre and Hewlett Foundation, 2018)⁶. On the other hand,

³ We borrow the definition of 'ecosystem of support' from *'Worldwide Initiatives for Grantmaker Support' (WINGS)*

⁴ Giving with a Thousand Hands, The Changing Face of Indian Philanthropy by Pushpa Sundar- <https://global.oup.com/academic/product/giving-with-a-thousandhands-9780199470686?cc=in&lang=en&>

⁵ <https://www.dasra.org/sites/default/files/Agents%20of%20Change.pdf>

a recent guide for funders (2018)⁷ developed by Worldwide Initiatives for Grantmaker Support (WINGS) builds a case for greater investment in the support ecosystem.

At a conceptual level, the support ecosystem can be understood through the 4C framework developed by WINGS⁸ (see adjoining figure).

Visualising a Robust Support Ecosystem: The 4Cs Approach

A support ecosystem helps build the sectors':

- **Capacity** in terms of the *volume of resources* (both financial and non-financial) that comes into the sectors as well as the *strategic allocation of these resources* for greater impact.
- **Capability** by increasing *professionalism* in the sectors through established practices of good governance, operational behaviour and performance. It also increases levels of *knowledge* on the sectors and *skillsets* required to apply the knowledge in relevant situations.
- **Credibility** by garnering *public support and engagement*, *increasing trust and awareness* about the value and impact of the sectors, thereby *generating transparency*.
- **Connections** through better *communication*, increased *collaboration* among sector stakeholders and through its ability to *inform and influence* policy and legislation.

In this study, we make a first-of-its-kind attempt to map the current state of the support ecosystem available to the social impact and philanthropy sectors in India. We examine two specific aspects of the support ecosystem, i.e. trends and patterns in the use and usefulness of support services to NGOs and foundations, and the spread of

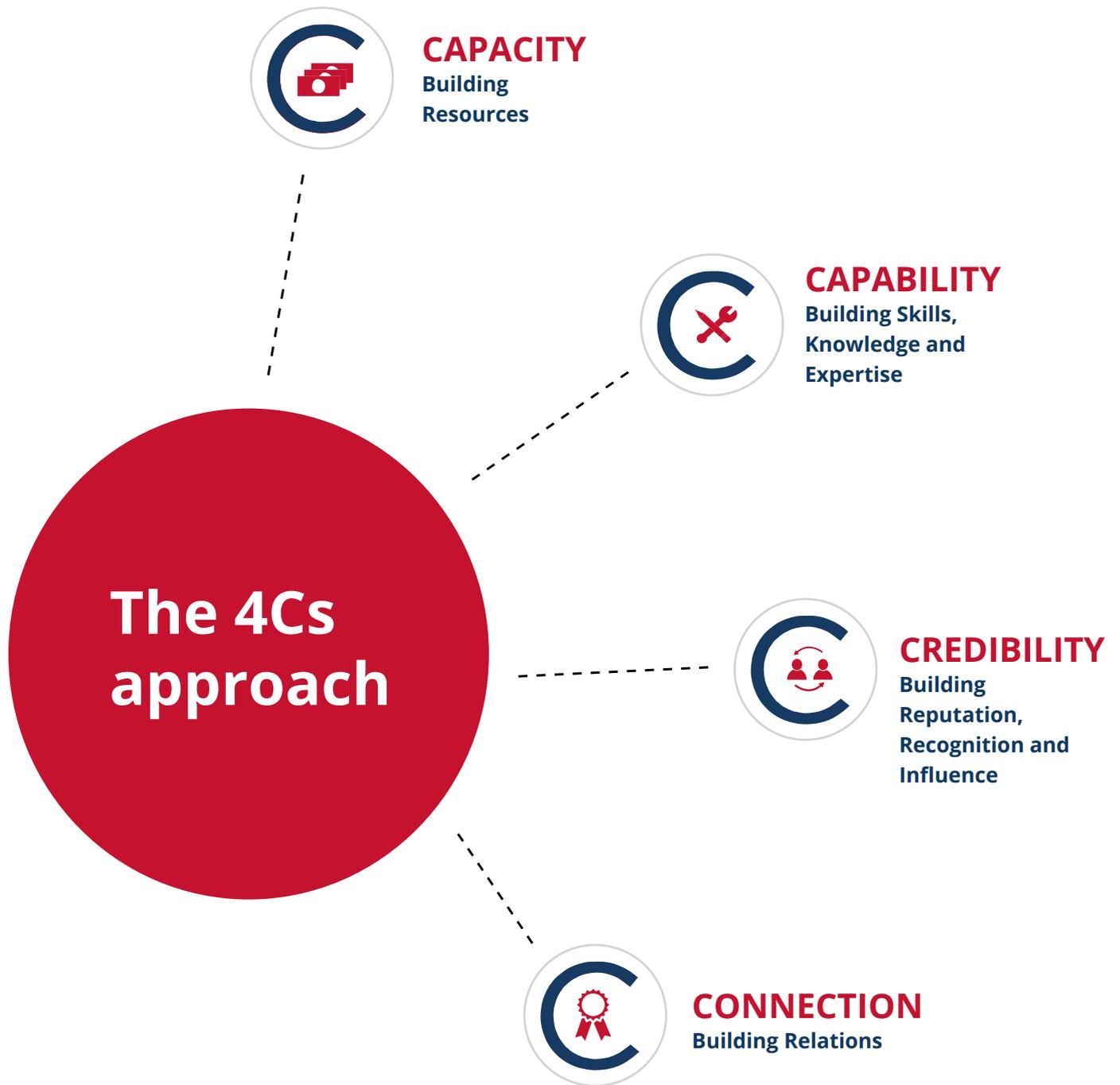
service providers across Indian states.

The findings speak to NGOs, funders and ecosystem organisations, helping them in building the support ecosystem and in noticing gaps in the existing structure. Finally, we hope that the recommendations provided will aid the development of the support ecosystem.

⁶ <http://infrastructure.foundationcenter.org/>

⁷ <http://wings.issuelab.org/resource/unlocking-philanthropy-s-potential.html>

⁸ <https://www.issuelab.org/resource/infrastructure-in-focus-a-new-global-picture-of-organizations-serving-philanthropy.html>



2. Approach & Methodology



We adopted a quantitative methodology in this study and conducted a digital survey of 800 NGOs and 67 foundations registered in the database of GuideStar India, which includes more than 8500 accredited organisations across India. The share of foundations in GuideStar India's database was relatively small; hence, we utilised a purposive sampling strategy and reached out to additional foundations through CSIP's internal networks.

The sample composition for NGOs is broadly representative of the geographic spread of NGOs in India. This was ascertained by comparing the distribution of NGOs in the study sample with that of GuideStar India's NGO database and the NGO Darpan⁹ repository. For foundations, it was challenging to ascertain the representativeness of the sample size, as public records on the number and spread of foundations in India are

not available. However, the Global Philanthropy Report¹⁰ (Harvard Kennedy School, 2018) lists the total number of foundations in India as 583. By this estimate, our sample consisted of 11.5 percent of the total foundation population spread across Indian states. It is, of course, worth noting that a great number of organisations are not included in these databases, and hence are not covered by this study.

The study examines two broad research questions:

- To what extent do NGOs and foundations find support services useful and use them¹¹?
- What patterns can be discerned in the geographic spread of support service providers across India?

The following conceptual framework was adopted to explore these research questions.

Conceptual Framework of the Study

Research Questions	Analysis Indicators
Do NGOs and foundations find support services useful?	<ul style="list-style-type: none"> • % of NGOs and foundations finding support services useful
Do NGOs and foundations use support services? What is the extent of difference between the use and usefulness of support services?	<ul style="list-style-type: none"> • % of NGOs and foundations using support services • % share of NGOs and foundations using a service they find useful • Comparison between overall use and usefulness of services • Comparison between most useful and most used services • Difference between % values of usefulness and use for each service category among NGOs and foundations
To what extent do NGOs and foundations which find support services useful also use them?	<ul style="list-style-type: none"> • % share of NGOs and foundations finding a service category most useful and also using it
Do the thematic area and budget size of an organisation determine its overall use of support services? Are there support services which are preferred by NGOs and foundations across thematic areas and organisation size?	<ul style="list-style-type: none"> • Number and share of service categories used across thematic areas and operating budget categories • Service categories most used and least used across thematic areas and operating budget categories
What is the geographic spread of support service providers across India?	<ul style="list-style-type: none"> • % share of service providers in each Indian state across service categories
How does the spread of support service providers compare with the spread of NGOs and foundations?	<ul style="list-style-type: none"> • Comparison between % share of NGOs and foundations and support service providers

⁹<https://ngodarpan.gov.in/>

¹⁰https://cpl.hks.harvard.edu/node/1124122/e?admin_panel=1

¹¹The reasons why organisations find a service useful or use them or why they don't find a service useful and don't use them are not explored in the study. However, potential reasons are mentioned in the next section.

Service categories: Based on discussions with sector experts and secondary data review¹², a long-list of service categories was developed. This list was narrowed down to a total of 20 categories by clubbing together services that were of similar type¹³. Three types of support services were then identified. Detailed definitions of each service category along with examples of service providers are provided in Annexure 1.



Thematic areas: This refers to the broad issues on which NGOs and foundations focus their interventions. A set of 16 thematic areas was used for analysis, ranging from health and education to climate change and animal rights. A detailed sample profile of NGOs and foundations in terms of their thematic areas of work is mentioned in Annexure 4.



Operating budget: This refers to the annual operating budget of NGOs and foundations. For NGOs, seven categories of operating budget were developed¹⁴. Due to the smaller sample size among foundations, only six budget categories were used. The table on the right, presents the budget categories and the corresponding nature of the organisation size.



The conceptual framework includes a typology of three types of support service categories, which have been used for data interpretation and analysis.

Types of Support Services

Core Organisational Support Services	Functional Support Services	Sector Advancement Support Services
Programme/Grant/Strategic Advisory	Communication	Sector Advocacy
Organisational Capacity Building	Fundraising	Sector Governance
Grant Management & Implementation Support	Financial, Tax & Audit	Promotion of Public Awareness, Engagement & Trust
	HR & Talent Management	Information & Knowledge on the Sector
	Legal & Compliance	Organisations/ Campaigns Promoting Giving
	Monitoring & Evaluation	Academic Institutions Focused on Social Sector Talent
	Proposal Writing	Credibility, Accreditation, Transparency & Benchmarking Services
	Technology Solutions	
	Research	
	Volunteer Management	

Budget Categories and Nature of Organisations

Annual Budgets (INR) of NGOs	Annual Budgets (INR) of Foundations	Organisation Size
Upto 5 Lakhs	Upto 10 Lakhs	Very Small
5-10 Lakhs		
10-50 Lakhs	10-50 Lakhs	Small
50 Lakhs-1 Crore	50 Lakhs-1 Crore	Medium
1-5 Crore	1-5 Crore	Large
5-10 Crore	5-10 Crore	
Above 10 Crore	Above 10 Crore	Very Large

¹² <https://www.dasra.org/sites/default/files/Agents%20of%20Change.pdf>, WINGS List of Support Services, Sundar (2017)

¹³ For example, Online Crowd-funding was clubbed in the same service category as Fundraising

¹⁴ These categories were developed specifically for the purposes of this study and are based on an internal mapping of the various types of philanthropy and social impact support services available globally. The definition of each service is shared in Annexure 1.

3. The Current State of the Support Ecosystem



A range of interesting and at times contradictory conclusions emerged from the data gathered. To establish the study's key findings, we examined data from each of the research questions through two broad perspectives. We first studied support services as a composite category, and looked at the highest and lowest percentage share of NGOs and foundations engaging with them. This gave us an overall sense of the extent of engagement between NGOs and foundations and support services. Second, we examined the range in the percentage shares to understand the extent of disparities in the engagement across various service categories.

In addition to the broad findings for each research question, in this study we also discuss data points with regard to specific service categories when these are particularly distinctive, revealing something about the kind of support services NGOs and foundations prefer. Possible explanatory factors for the findings, especially those arising from characteristics of the dataset such as thematic areas of work or operating budget, are beyond the scope of this study—however, they do open up avenues for future enquiry. These are covered in the 'Maybe because...' sections.

Glimpses of the Dataset

A glimpse into key characteristics of our dataset is critical to understanding the findings, particularly when it comes to possible explanatory factors.

The NGOs in our sample, as is the case with the population at large, primarily work on education, health and livelihood, while the foundations work in education and health. With regards to the operating budget, the greatest share of NGOs has an annual operating budget in the range of INR 10-50 lakh, while the greatest share of foundations has an annual operating budget of up to INR 10 lakh. Around half of the sampled NGOs and foundations are very small or small in size, with an annual operating budget of up to INR 50 lakh. The largest percentage of NGOs and foundations are located in Maharashtra, Uttar Pradesh and West Bengal. Lastly, in our dataset, organisations which have used a service have not always found it useful. In other words: services in the category of 'used' are not a subset of those in the category of 'useful'¹⁵. A detailed profile of the NGOs and foundations in our sample is provided in Annexure 4.

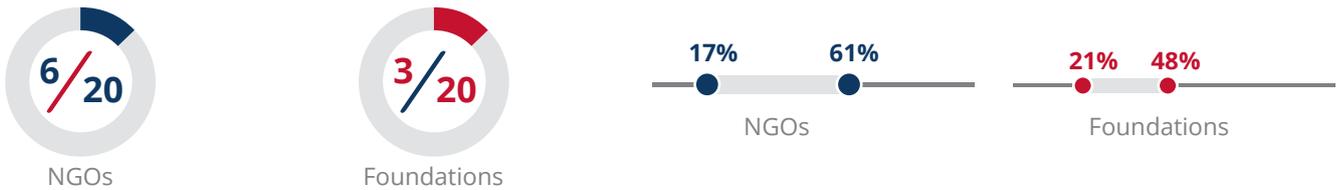
¹⁵We have attempted to isolate organisations which find a service useful and also use it which are discussed under specific research questions.

3.1. Do NGOs and foundations find support services useful?

As a composite category, support services are useful to both NGOs and foundations. More NGOs find support services useful than foundations.

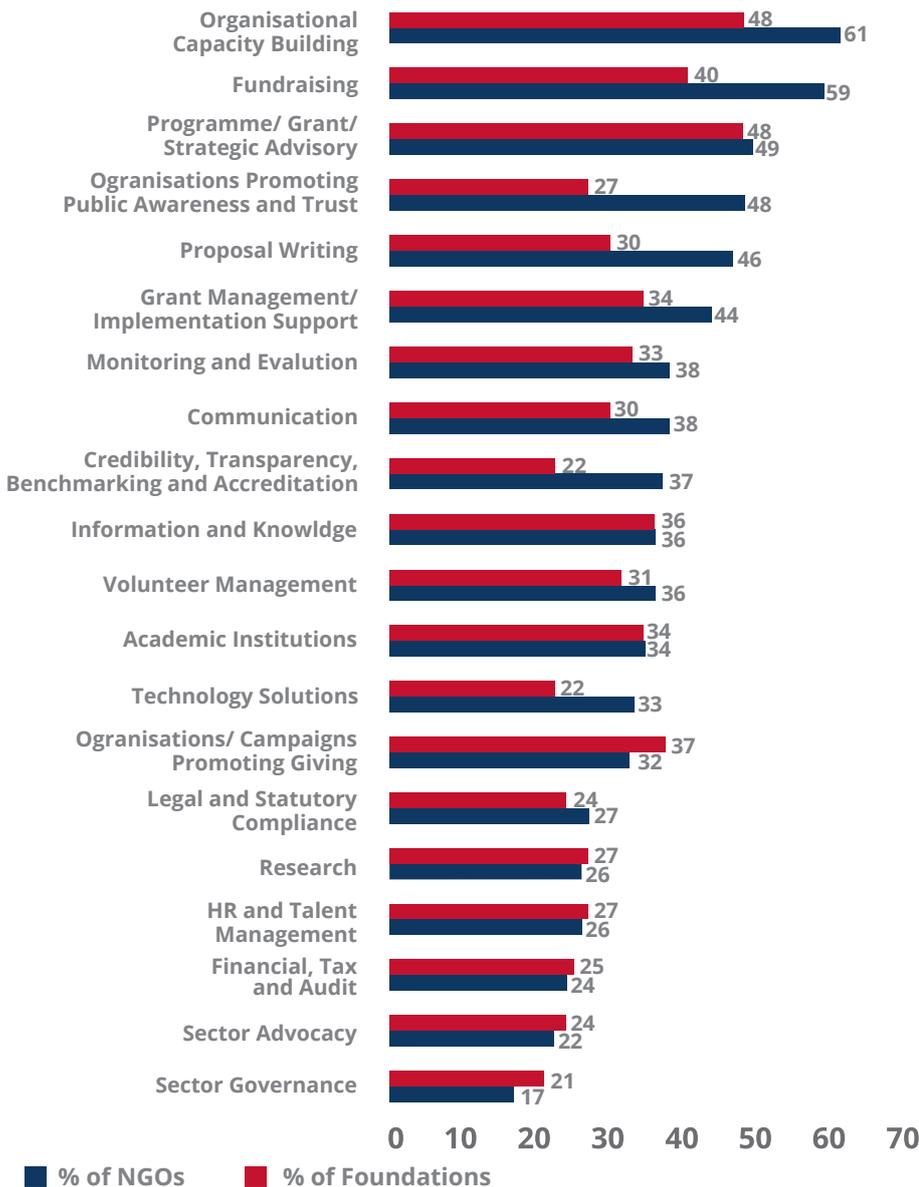
Number of service categories found useful by more than 40% of respondents

The share of NGOs and foundations finding a support service useful ranges between



Across categories, usefulness of support services for both NGOs and foundations is fragmented and weak.

Graph 1: Service Categories Found Useful- NGOs vs. Foundations



Maybe because...

Over 65 percent of NGOs and 70 percent of foundations work in established sectors such as education and health, where, ideally, support services should be well-developed. The weak and fragmented usefulness of support services could indicate poor general awareness about their utility and/or lack of availability of these services, especially for services other than core organisational ones.

Thought Box...

Usefulness of support services such as financial, tax and audit as well as legal and statutory compliance, which are critical for organisational effectiveness and regulatory responsiveness, is rated poorly, measuring in the range of 24-27 percent for both NGOs and foundations.

Technology, a fast emerging critical domain in the social impact and philanthropy sectors, is found useful by only 33 percent of NGOs and 22 percent of foundations.

3.2. Do NGOs and foundations use support services? What is the extent of difference between the use and usefulness of support services?

At an aggregate level, support services are used by both NGOs and foundations, but in notably smaller numbers. Overall, more NGOs use support services than foundations.

1/3

Approximately only **one-third** of the sample NGOs and foundations use at least one of the 20 service categories.

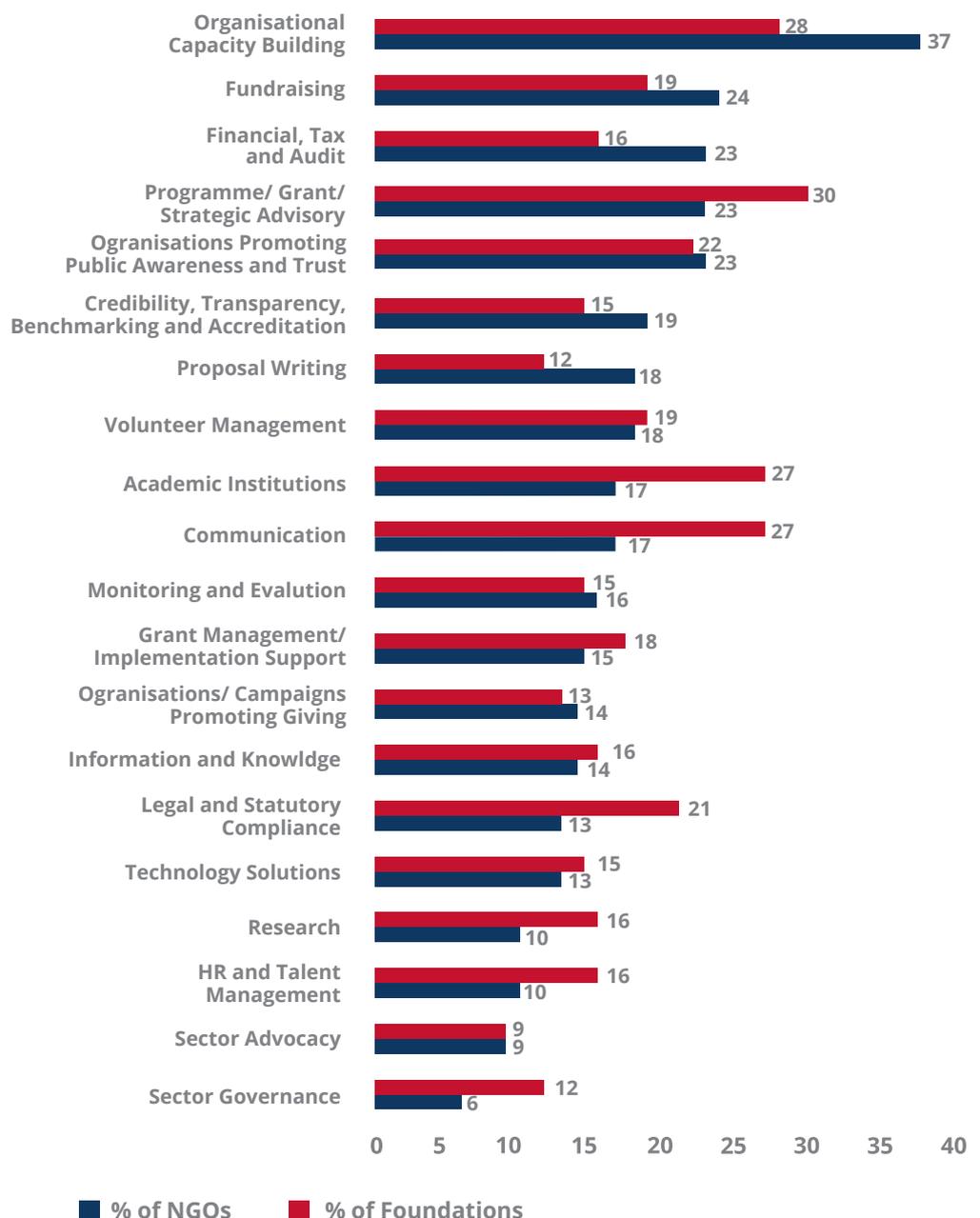
>30%

Of these, 19 services categories are used by less than **30 percent** of NGOs and foundations.



The range in the percentage of NGOs and foundations using support services varies across categories widely. For NGOs this ranges from 37 percent (organisational capacity building) to 6 percent (sector governance), and for foundations this ranges from 30 percent (programme/ grant/strategic advisory) to 9 percent (sector advocacy). This indicates that most support services are used by a very small proportion of sampled organisations.

Graph 2: Service Categories Used- NGOs vs. Foundations

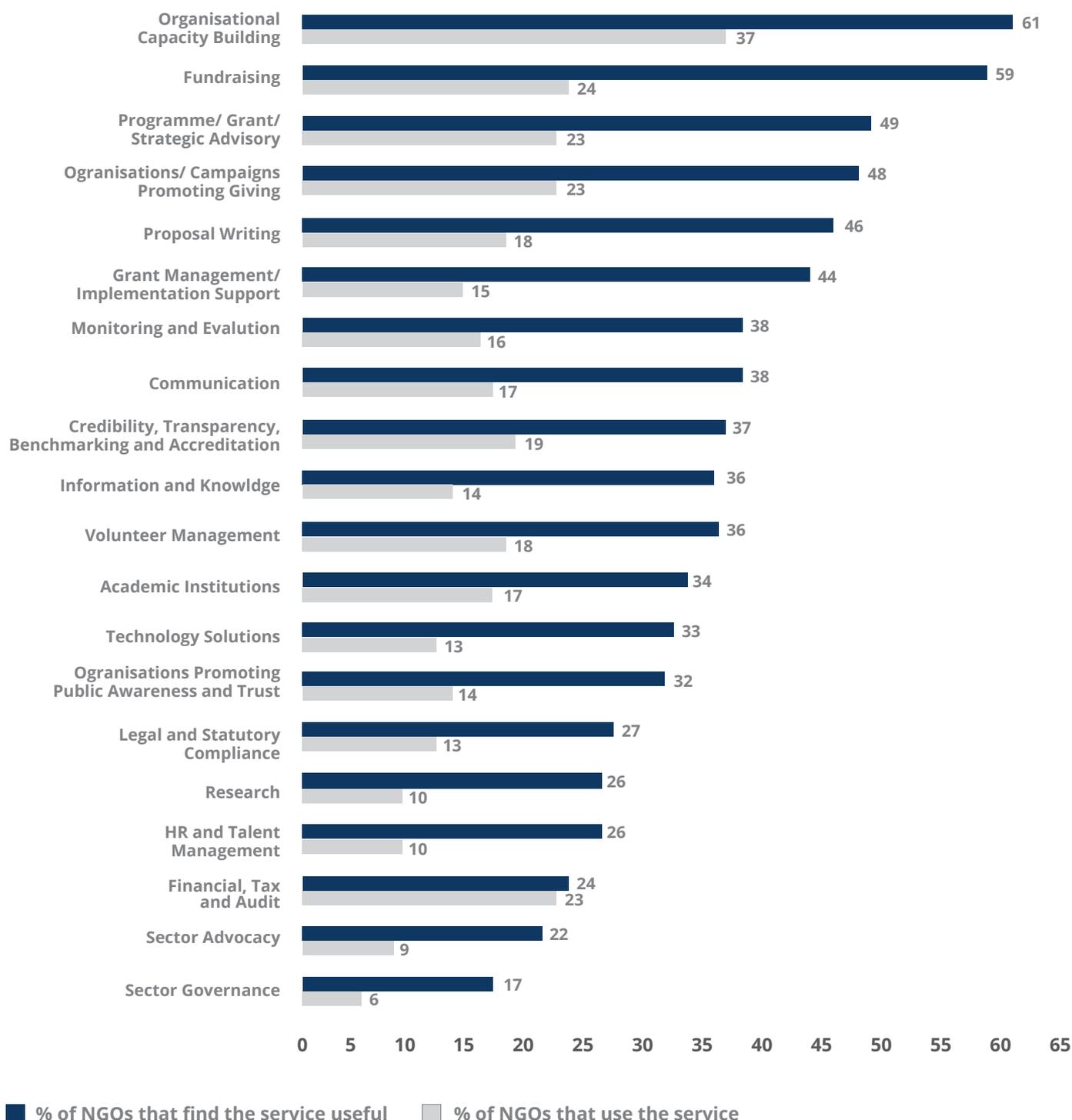


Overall, the gap between the usefulness and use of support services, while prominent, is not enormous.

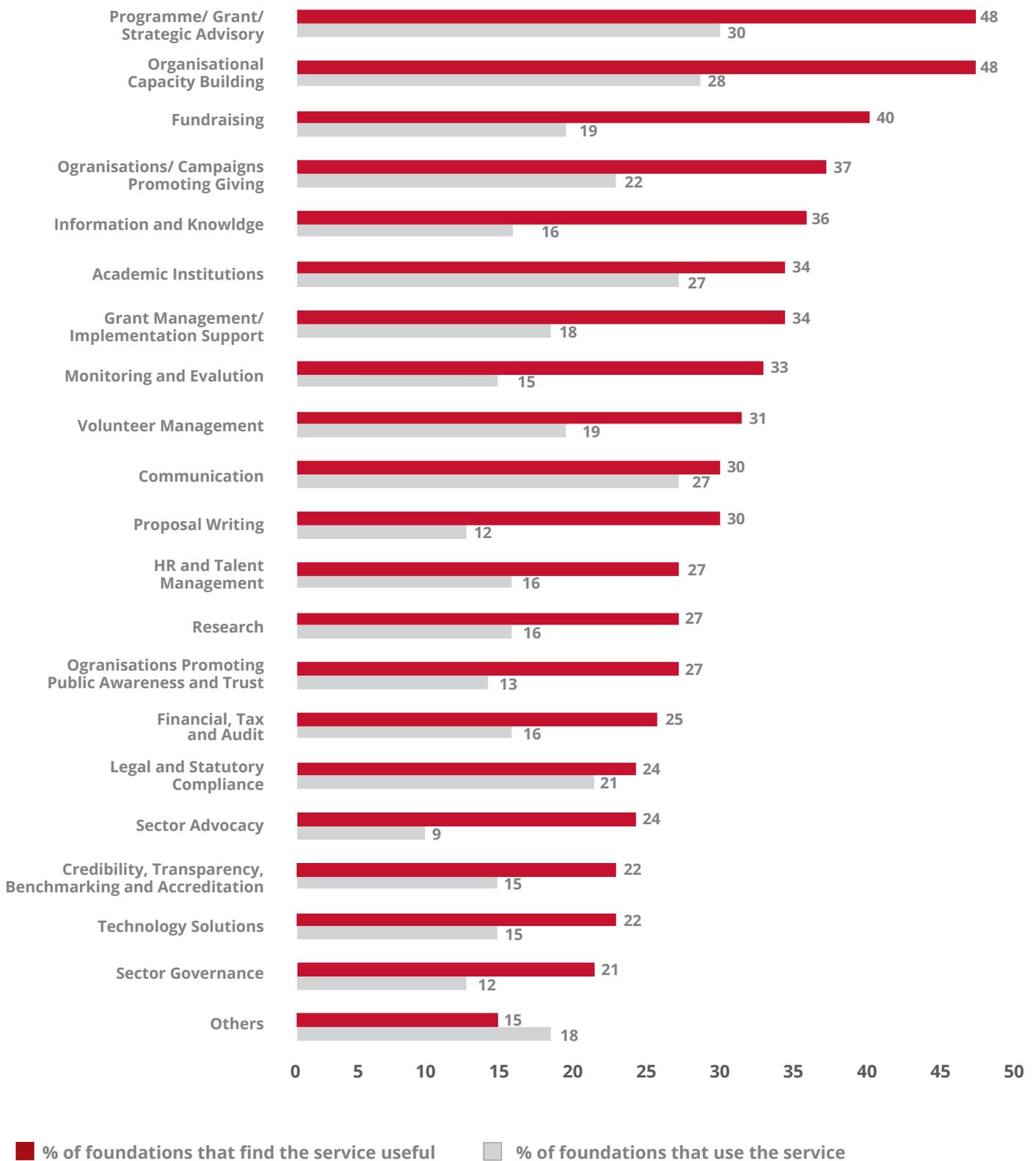
In each service category, use rates are lower than usefulness, though the margin of difference varies significantly across categories. The service categories that score the highest in both use and usefulness among NGOs and foundations pertain to core organisational support services.

Organisational capacity building and programme/grant/strategic advisory service features are the most useful and most used support service categories as rated by NGOs and foundations, respectively.

Graph 3: Service Categories - Useful vs. Used

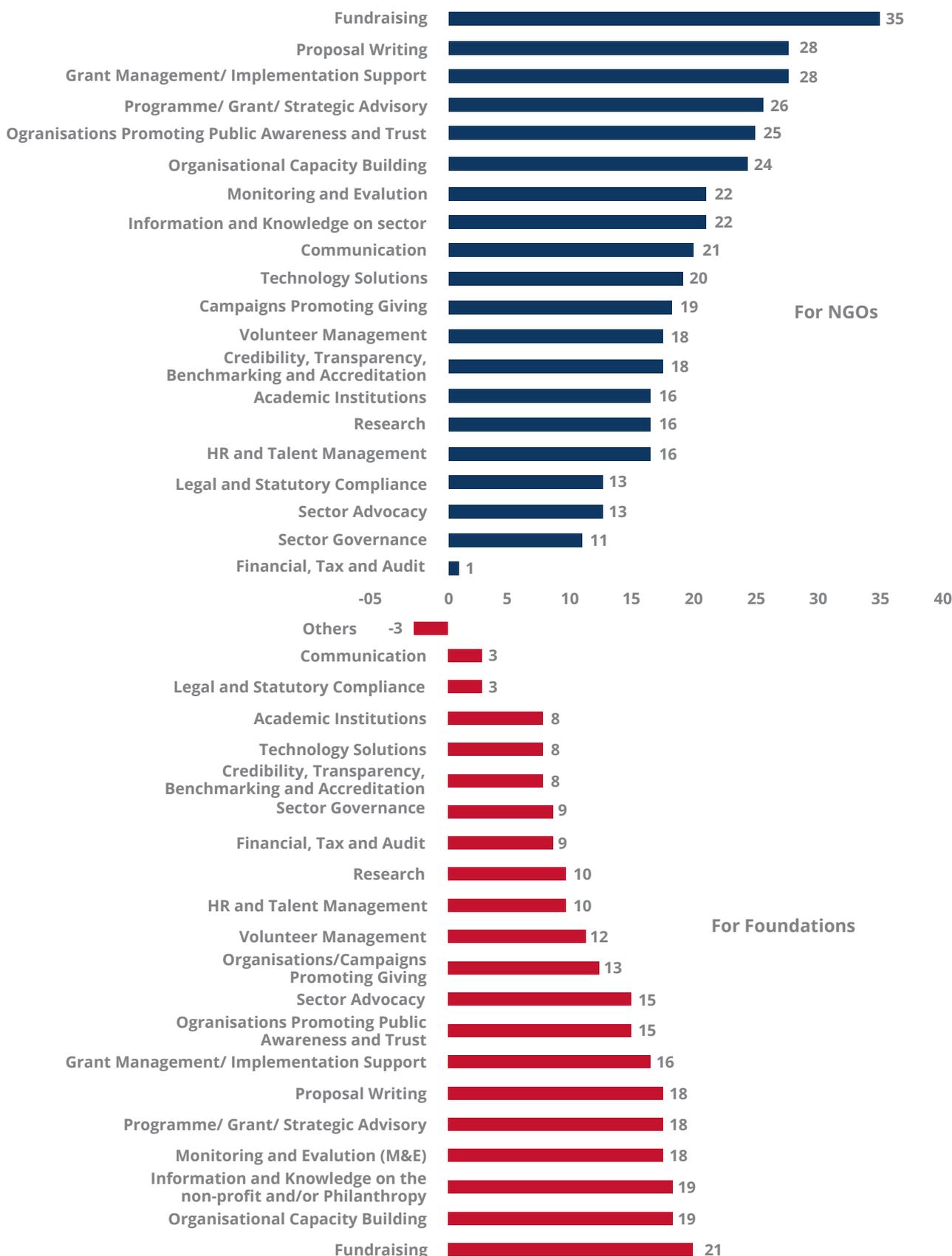


Graph 4: Service Categories - Useful Vs. Used



The maximum gap between the measured use and usefulness of a service category is that of 35 percent and 21 percent for fundraising, among NGOs and foundations respectively. When contrasted with the highest overall usefulness measures, of 61 percent for NGOs and 48 percent for foundations, this gap, while prominent, is not enormous.

Graph 5: Percentage Difference in Useful Vs. Used NGOs and Foundations



Maybe because...

In addition to lack of awareness and unavailability of support services, it's likely that low levels of usage are a result of limited financial capacity. Approximately half of the sampled NGOs and foundations are small in size, with annual operating budgets of less than INR 50 lakh.

Poor financial capacity could also explain why only core organisational support services of organisational capacity building and programme/grant/strategic advisory services score the highest in usefulness and use. Given that such activities are fundamental to the basic functioning of NGOs and foundations, only these are being accessed through support agencies to the extent observed.

The role of financial capacity in determining usage appears to be critical. Foundations use support services more than NGOs, suggesting that greater control over their financial base may be a key explanatory factor in determining usage. The prominent—though not enormous—mismatch between services found useful and services used suggests that while the support ecosystem is somewhat misaligned, the overall need and demand for support services in general and for some support services in particular could just be limited. Fundraising, as the support service with the maximum mismatch between usefulness and use, indicates that NGOs and foundations are interested in strengthening their financial capacities.

Thought Box...

NGOs use financial, tax and audit services more than foundations. Meanwhile, foundations use legal and statutory compliance services more than NGOs. This could be because foundations are more likely to have financial, tax and audit capacities within their organisations. (Ref: Graph 2)

Foundations appear to be relatively more invested in sector advancement issues. Their use of sector governance services is significantly higher than that of NGOs. However, when viewed in absolute terms, this percentage is low. (Ref: Graphs 3 & 4)

Among NGOs, the service category of financial, tax and audit has the minimal mismatch of only 1 percent, which possibly indicates that the already limited, stated usefulness is broadly matched by the available service providers. (Ref: Graph 5)

3.3. To what extent do NGOs and foundations which find support services useful also use them?

At an aggregate level, more NGOs use services they find useful than foundations. Services which score the highest in standalone analyses of usefulness and use are also on top in the analysis of services which are found 'useful and also used'.



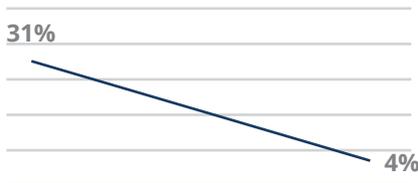
Approximately, only one-third of the NGOs and foundations report using a support service that they find useful



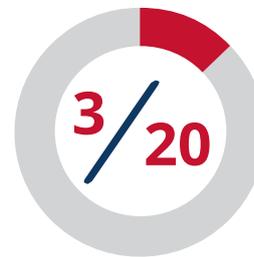
Organisational capacity building and programme/grant/strategic advisory are services which are found most useful and used by NGOs and foundations, respectively



Only one service category among 20 is found useful and also used by more than 20% of NGOs.



The upper and lower ends of services found useful and also used are stark, with the highest being **31 percent** (organisational capacity building) and the lowest being **4 percent** (sector governance) among NGOs.



Only three out of 20 service category are found useful and also used by more than 20 percent of foundations.



Among foundations, the upper most end was **27 percent** (programme/grant/strategic advisory) while the lowest was **6 percent** (sector governance).

Graph 6: Share of NGOs Finding Services Useful and Using it



Maybe because...

Low use of services rated to be useful definitely underlines that multiple factors of value, availability and financial resources could be at play when it comes to the uptake of support services.

Graph 7: Share of Foundations Finding Services Useful and Using it



Thought Box...

NGOs clearly have a distinctive and critical need for core support services, such as organisational capacity building. Survey data indicates that these are the only services that they value enough for scarce financial resources to be devoted to them.

3.4. Do thematic areas and budget sizes determine the overall use of support services? Are there support services which are preferred by NGOs and foundations across thematic areas and organisation size?

Irrespective of the thematic areas in which the sampled NGOs and foundations work, there are at least a few support services that are consistently being used. This indicates that, overall, use of support services is not dependent on the thematic area of work.



All support services were used by NGOs working in different thematic areas—even though the range of use varied widely by service categories and thematic areas. Among foundations, only those working on animal rights mention not using some categories of support services.



Support services that are most commonly used by NGOs across thematic areas are: organisational capacity building, programme/grant/strategic advisory, as well as services pertaining to promotion of public awareness, engagement and trust. For foundations, in addition to the first two, academic institutions focused on social sector talent was among most commonly used services.



Largely, support services that are least used by NGOs, irrespective of the thematic areas in which they work, are: sector advocacy and governance, HR and talent management services, and research and technology solutions. Sector advocacy also features as the least used support service across all thematic areas among sampled foundations.

Table 1: Service Categories Used According to Thematic Areas (Foundations)

Services Used > Thematic Areas	Academic Institutions	Programme/Grant/Strategic Advisory services	Organisational Capacity building	Sector Advocacy
Health				
Livelihoods				
Gender				
Education				
Climate Change				
Poverty Reduction				
Environment				
Financial inclusion				
WASH				
Human Rights & Social Justice				
Community Development				
Governance				
Agriculture				
Disability				
Animal Rights				
MSME				
Others				

■ Service Categories Most Used

■ Service Categories Least Used

Table 2: Service Categories Used According to Thematic Areas (NGOs)

Thematic Areas > Service Categories v	Edu- cation	Health	Liveli- hood	Rural develop- ment	Environ- ment	WASH	Poverty Reduc- tion	Agricul- ture	Gender	MSME	Human Rights & Social Justice	Climate Change	Disability	Financial Inclusion	Gov- ern- ance	Animal Rights	
Programme/Grant/ Strategic Advisory	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue
Sector Advocacy	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue
Organisational Capacity Building	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue
Communication services	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue
Financial, tax and Audit	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue
Fundraising services	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue
HR and Talent Management	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue
Legal and statutory Compliance	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue
Monitoring and Evaluation	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue
Proposal Writing	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue
Research	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue
Technology Solutions	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue
Sector Governance	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue
Organisations / Campaigns Promoting Giving	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue
Organisations Promoting Public Awareness & Trust	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue
Volunteer Management	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue

Dark Blue Service Categories Most Used ■ Service Categories Least Used

All NGOs and foundations use some support services regardless of their size. However, the extent to which support services are used varies widely by service categories and operating budget.



Only one support service (organisational capacity building) was consistently ranked as the 'most used' service among NGOs across all budget categories.



Only two support services (organisation capacity building and programme/grant/strategic advisory) were consistently ranked as the 'most used services' among foundations across all budget categories.

Table 3: Service Categories Used According to Operating Budget (NGOs)

Operating Budget >	upto 5 lakhs	5 to 10 lakhs	10 to 50 lakhs	50 lakhs to 1 crore	1 crore to 5 crore	5 crore to 10 crore	10 crore and above
Academic Institution							
Programme/Grant/Strategic Advisory							
Sector Advocacy							
Organisational Capacity Building							
Communication							
Information and Knowledge							
Credibility, Transparency, Benchmarking, Accreditation							
Financial, Tax and Audit							
Fundraising							
Grant Management/ Implementation Support							
HR and Talent Management							
Legal and Statutory Compliance							
Monitoring and Evaluation							
Proposal Writing							
Research							
Technology Solutions							
Sector Governance							
Organisations/Campaigns Promoting Giving							
Organisations Promoting Public Awareness & Trust							
Volunteer Management							

■ Service Categories Most Used

■ Service Categories Least Used

Table 4: Service Categories Used According to Operating Budget (Foundations)

Operating Budget >	Upto 10 Lakhs	10-50 Lakhs	50 Lakhs - 1 Crore	1-10 Crore	10 Crore and above
Services Used v					
Program/Grant/ Strategic Advisory services					
Organisational Capacity Building					
Sector Governance					

■ Service Categories Most Used

■ Service Categories Least Used

Maybe because...

Two interrelated factors would need to be explored in order to understand the extent to which support services are used across budget categories among NGOs, i.e. the need for services and financial capacity. It's likely that very small and small NGOs prioritise the use of those services that are absolutely fundamental to their existence, which broadly fall into the category of core organisation services. Large and very large organisations may have developed internal capacities for some of these services; therefore, their use of these services rates proportionately lower than small and very small NGOs.

Thought Box...

Overall, a clear interest among NGOs and foundations to shape the sector has not emerged from the data. Sector governance is among the least ranked service across thematic areas and operating budget categories for NGOs, but promotion of public awareness, engagement and trust ranks among the most commonly used ones. This is something of an anomaly, because this latter service is not among the top ranked in standalone analysis of usefulness or use. It is present among the top six, but with a significant gap from the service which scores highest in use. However, across all findings, it is clear that NGOs prioritise core organisational support services.

The relatively smaller size of NGOs could also be a potential reason why HR and talent management services are ranked lowest. The scale of such NGOs is likely to be limited to a small geographic area. They may prefer to address their staffing needs through local community connections instead of approaching hiring agencies.

3.5. What does the geographic spread of support service providers across India look like? How does the spread of support service providers compare with that of NGOs and foundations?

The geographic distribution of support service providers is largely concentrated in a few states. Some states have a higher share of NGOs and foundations present within their borders, as compared to their share of support service providers.

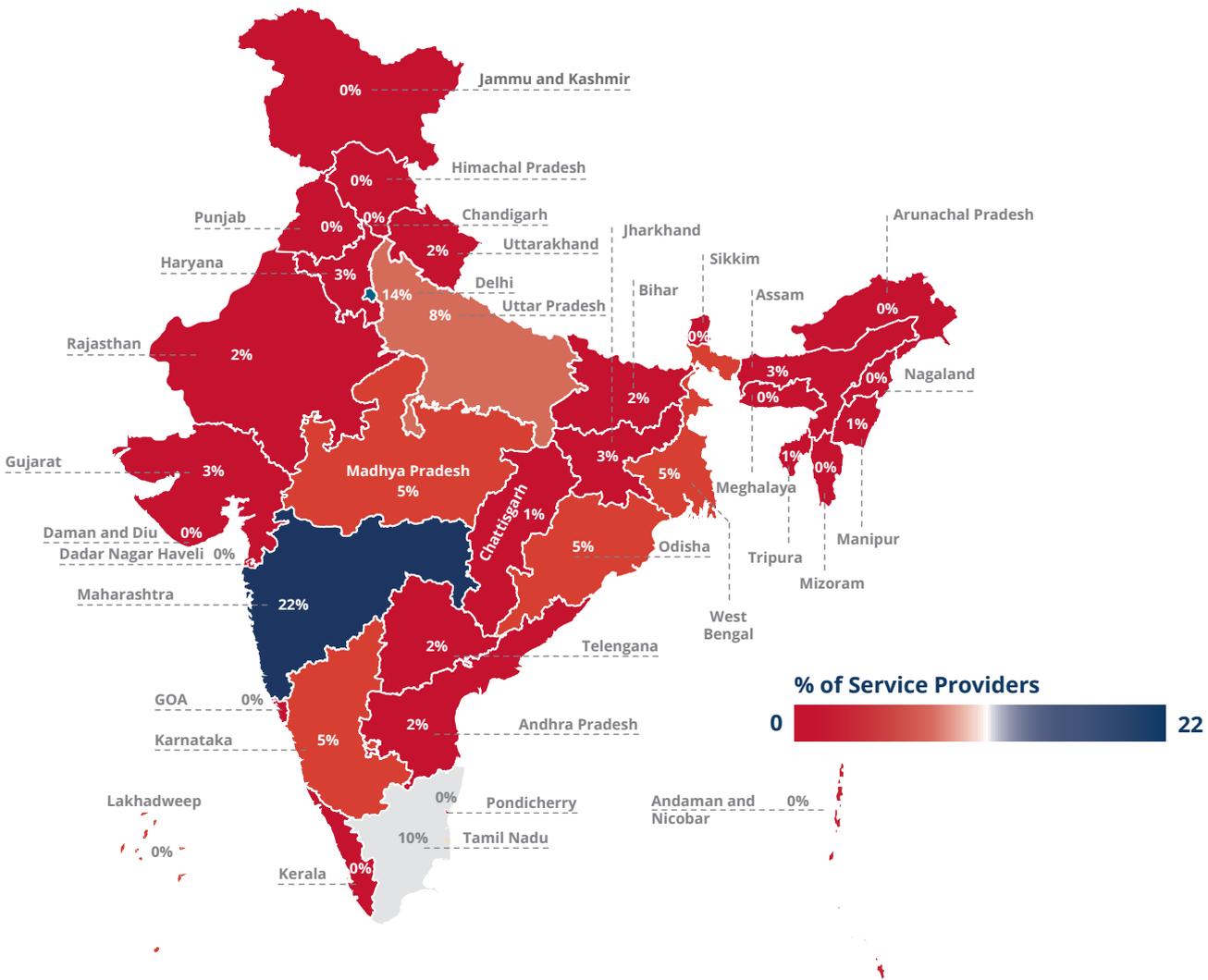


Figure 1: Geographic Distribution Service Providers (Across All Categories)



Speaking at the national level, geographic areas or states with the highest number of support service providers are Maharashtra, followed by Delhi, Tamil Nadu and Uttar Pradesh.



Geographic areas or states with the lowest number of support service providers are the northern states such as Jammu & Kashmir, Himachal Pradesh, Punjab and the union territory of Chandigarh. North-eastern states such as Arunachal Pradesh, Nagaland, Mizoram, Meghalaya, Tripura and south-western states such as Goa and Kerala also have low numbers of support service providers.

The strong presence of NGOs and foundations in a state is not a reliable indicator of an equally prominent presence of support services providers. Expectedly, however, the lack of NGOs and foundations in a particular area seems to strongly indicate a lower presence of support service providers as well.

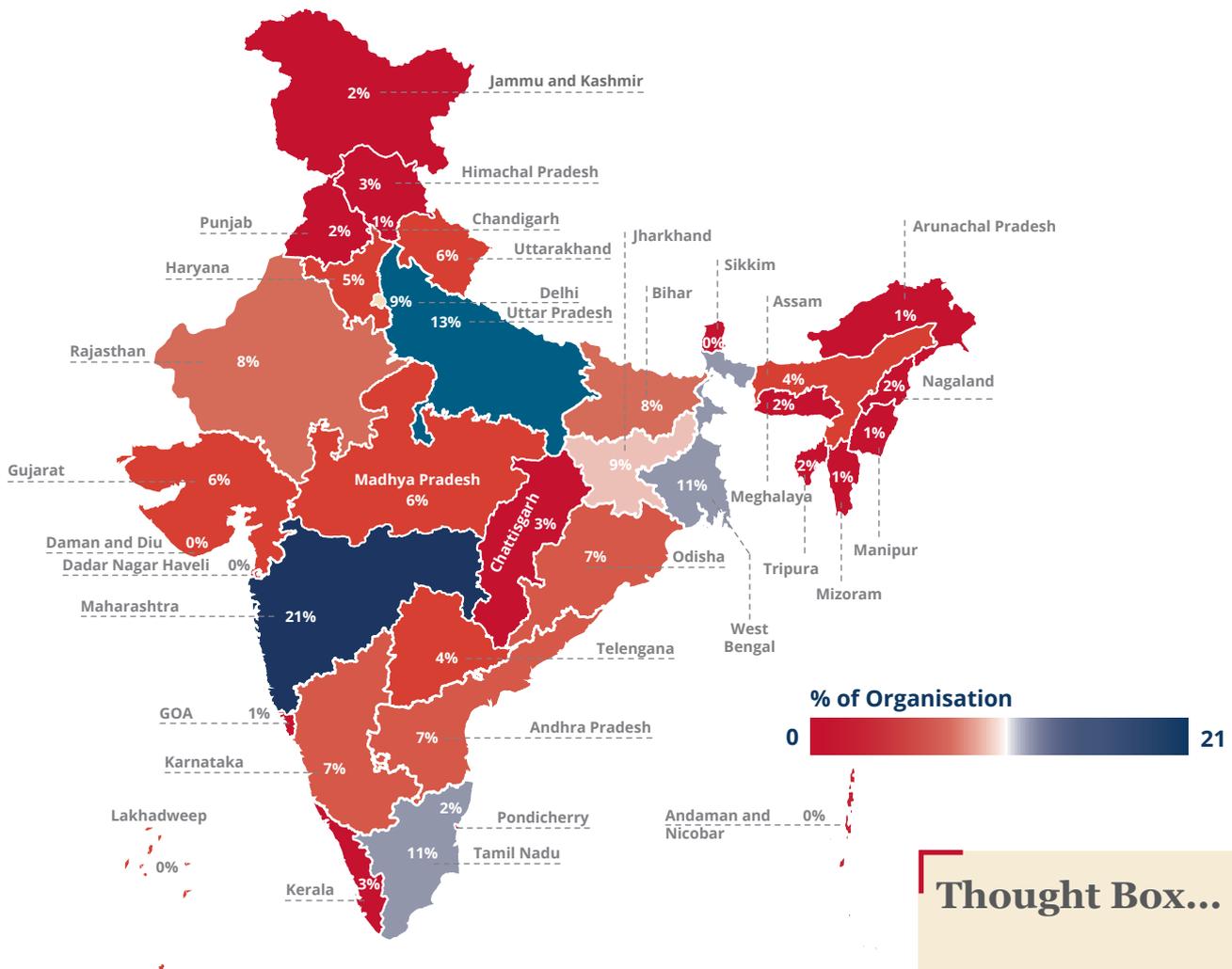


Figure 2: Geographic Distribution of NGOs and Foundations



Geographic areas where the number of NGOs and foundations more directly correlates with the number of support service providers are the states of Maharashtra, Tamil Nadu, Karnataka, Odisha and Madhya Pradesh.



Geographic areas where the number of NGOs and foundations is significantly higher than the number of support service providers are the states of Gujarat, Rajasthan, Bihar and Jharkhand.

(See Annexure 2 for a detailed list of states with information on whether the number of NGOs and foundations present is higher/lower than the number of support service providers in the area.)

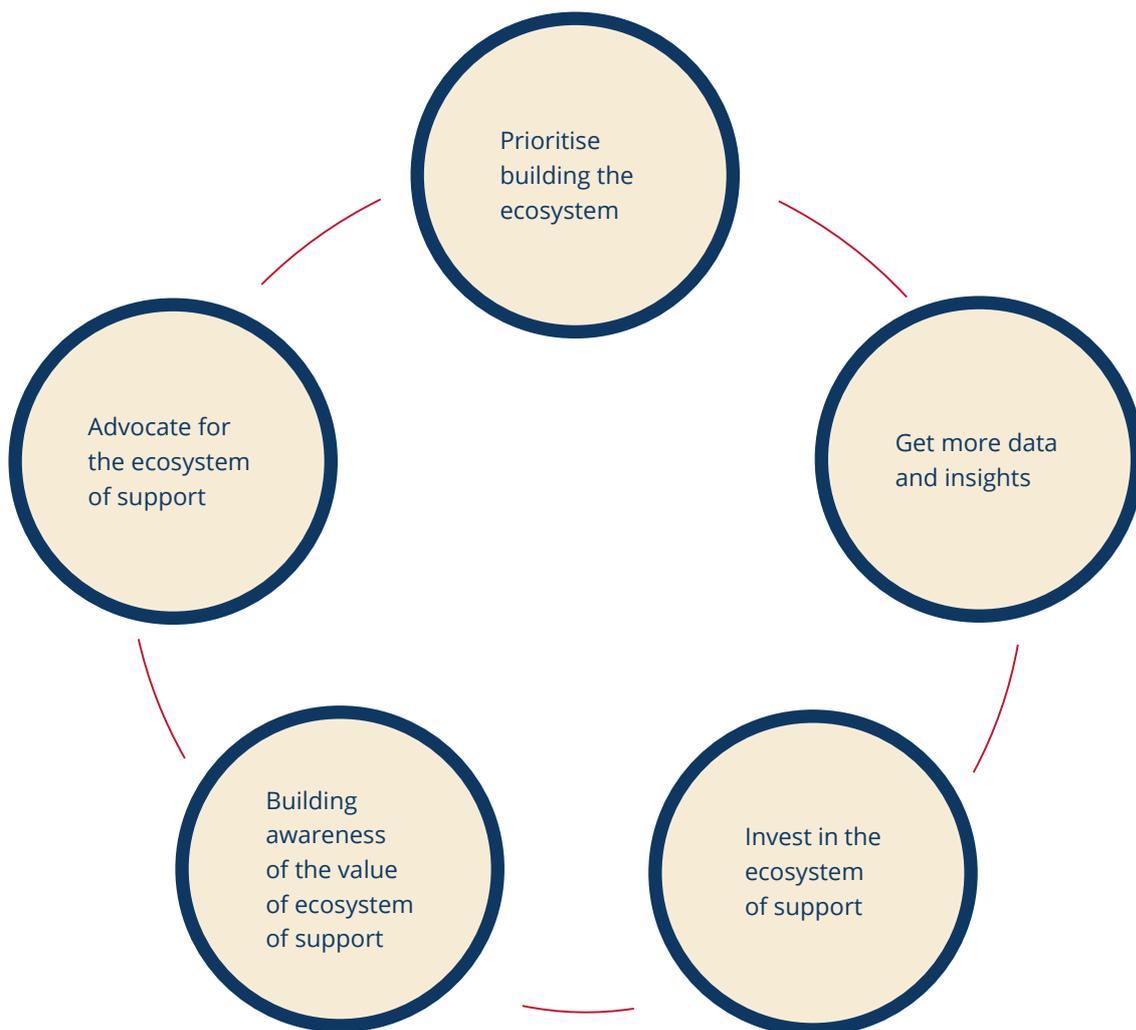
Thought Box...

In addition to the presence of NGOs and philanthropic foundations in a particular area, other factors may be at play in the development of a support ecosystem. For instance, West Bengal, despite having a strong presence of NGOs and foundations, has a significantly lower share of support service providers. On the other hand, in Delhi support service providers have a stronger presence than NGOs and foundations. The presence of ancillary and related economic sectors—such as policy making, government, higher education, etc.—which also use similar support services could also be a relevant factor.

4. Building the Field Together: **Key Recommendations**



Overall, the study findings highlight the poor uptake of support services by NGOs and philanthropic foundations and a weak support ecosystem. To address this, each category of stakeholders—NGOs, funders and ecosystem organisations—need to build the field and advocate for a stronger support ecosystem.



Building the support ecosystem

Brief Snapshot of Key Recommendations

NGOs

- Greater openness to understanding the value-add of the support ecosystem
- Active use of support services to increase the efficiency and effectiveness of social impact work

Funders

- Investment in support ecosystem along with awareness-building on the value and use of support ecosystem
- Specific focus on uptake of sector advancement support services

Ecosystem Organisations

- Development of ecosystem networks among support service providers
- Generation of data and evidence around the support ecosystem
- Regular and timely communication with NGOs and foundations to understand evolving requirements of the sector

NGOs: The main challenge facing the sectors when it comes to building a strong support ecosystem has to do with the low scores of usefulness and even lower scores of use that support services garnered among NGOs and foundations. There is an urgent need for NGOs to look beyond the admittedly important priorities of survival, and to recognise the value of a strong support ecosystem. To help with the growth of this ecosystem, NGOs should actively seek support from funders to engage with service providers who offer such services, thereby increasing the efficiency and effectiveness of their work.

Funders: Funders and foundations, too, need to recognise the importance of a support ecosystem and invest in building support services that NGOs of different sizes can access. Foundations and philanthropists could use several channels to achieve this. They could encourage partners to seek and use a range of support services and fund this use. They could also work directly with ecosystem organisations and support their core organisational needs, allowing them to create awareness and promote use of services, thus helping advance the needs of the sector. Lastly, funders could play a crucial role in increasing awareness about the need for sectoral advancement services such as sector advocacy and governance: a much-needed push, given the extremely low current usage of these critical services.

Ecosystem Organisations: Ecosystem organisations include support service providers across various service categories. Our study highlights that a significant percentage of service providers are concentrated in Maharashtra, Delhi, Tamil Nadu and Uttar Pradesh. Service providers whose services are not dependent on geographical locations, such as volunteer management, finance, tax and audit, etc., need to actively reach out to states where the support ecosystem is poor, as in the northern and north-eastern states. Additionally, service providers in non-metro locations could play a more active role by increasing the range and reach of their service listings.

There is also a need for an 'ecosystem network' that provides a platform for peer learning, advocacy and solidarity among ecosystem organisations. Ecosystem networks could be set up at the regional level in order to represent local level support service providers and regional level issues. There is also a need to generate timely data on the state of the support ecosystem, a responsibility that could be shouldered by academic institutions working on the social impact sector. Lastly, ecosystem organisations need to work closely with NGOs and funders to understand the evolving needs of the sectors and respond accordingly in terms of providing the necessary services.

5. Conclusion



This research comes at a time when there are great expectations placed upon the social impact and philanthropy sectors. The role of the social impact sector and the part that philanthropy can play in accelerating its impact have acquired paramount importance. As articulated in this study, an ecosystem of support is essential for the sectors to maximise their impact and attain their higher purpose.

This report set out to examine two aspects of the current state of the support ecosystem: 1) trends and patterns in the use and usefulness of support services among NGOs and foundations, and 2) geographic spread of support service providers across India.

The study brings to light a deeply inadequate support ecosystem, as demonstrated by the poor overall scores of use and usefulness of support services and by a thin presence of support service providers across India.

The research shows that the sectors face multiple barriers in the emergence of a strong and sustainable support ecosystem. Some of these key impediments include a lack of awareness about the value of the support ecosystem to the work of organisations, limited financial and human resource capacities to access these services, and a deficit in the availability of service providers. Other fundamental and complex barriers could include the significant presence of small-sized NGOs and foundations across India, as well as the underlying factors influencing the decisions made by funding bodies

which generally prefer to dispense funds for programmatic activities over organisational and sector-strengthening ones. A fragmented regulatory environment and limited platforms for interactions between NGOs, foundations and other sector actors also add to the support ecosystem's insufficiencies.

This study focuses on only some of the aspects of the support ecosystem. To arrive at a comprehensive understanding of its state, further studies need to examine in-depth other factors that determine usefulness and use, such as cost, perceptions of value and overall sectoral culture. Further, mapping of the support ecosystem needs to be undertaken on a regular basis to assess gaps and opportunities for growth in the field and to understand the progress made towards the development of a robust support ecosystem.

Finally, based on the study results, we make a case for developing, promoting and supporting the field of support ecosystems through continued collaboration and partnerships at various levels. The study has presented preliminary evidence to support the case for building this field further, establishing actionable recommendations for each set of stakeholders—namely, for NGOs, funders and ecosystem organisations.

Overall, the study's recommendations point towards collectively investing in the field and advocating for a robust ecosystem of support to strengthen the social impact and philanthropy sectors.

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Annexures



ANNEXURE 1: Definition of Support Service Categories

- Academic institutions focused on social sector talent:** These organisations are academic institutions/colleges/universities that provide specific courses/degrees focused on building the talent of individuals aspiring to work in the social/development sector. Examples of these institutions are Tata Institute of Social Sciences, College of Social Work (Nirmala Niketan), etc. This category also includes management institutions offering fellowship programmes or executive education programmes for professionals in development/non-profit/social enterprise sector such as Indian School of Development Management, etc.
- Advisory services:** This category refers to organisations/individuals that advise on strategy, programme design, scale or grant-making, e.g. Samhita, Sattva, etc.
- Advocacy for policy reforms, tax and regulatory environment:** This category refers to organisations/individuals that advocate for reforms to improve laws and policies, including registration, FCRA, and tax policies that affect NGOs, social impact work and/or philanthropy. For example: Voluntary Associations Network of India (VANI), Centre for Advancement of Philanthropy (CAP), etc.
- Organisational capacity building:** This category refers to organisations/individuals that enhance the skills, knowledge and expertise on organisational or institutional aspects such as leadership, programme design, M&E, governance, scale and impact, etc.
- Communication services:** This category refers to organisations/individuals that provide communication support such as designing communication material, branding, digital marketing, etc. For example: The Communication Hub.
- Information and knowledge on the non-profit and/or philanthropy sector:** This category refers to organisations/individuals that provide sectoral information and knowledge on the philanthropy sector, e.g. India Development Review.
- Credibility, transparency and benchmarking organisations, including accreditation services:** This category refers to organisations/individuals that work with NGOs in the social sector to increase their credibility in terms of recognition/reputation, thereby driving greater efficiencies. These would include accreditation agencies such as GuideStar India, Credibility Alliance, etc.
- Financial, tax and audit services:** This category refers to organisations/individuals that provide financial, tax and auditing services to the social and philanthropy sector, in order to comply with all the regulatory financial requirements.
- Fundraising services:** This category refers to organisations/individuals that work in the area of raising funds for NGOs through various channels, including but not limited to tele-marketing, face to face requests/services, online marketing, crowdfunding, etc.
- Grant management/implementation support:** This category refers to organisations/individuals that manage the grant-making process, including allocating grants to different organisations, tracking budgets, conducting due diligence processes pertaining to expenses made on those grants. It also includes organisations that implement grant programmes for philanthropies and CSR, e.g. Sattva.
- HR and talent management:** This category refers to organisations/individuals that provide human resource (HR) solutions in the areas of talent management, recruitment, skill building, etc.
- Legal and statutory compliance services:** This category refers to organisations/individuals that provide legal and compliance related services including registration, 80G exemptions, and obtaining FCRA licenses.
- Monitoring and evaluation (M&E):** This category refers to organisations/individuals that provide technical assistance in M&E services, e.g. implementing M&E frameworks, designing M&E parameters, etc.
- Proposal writing:** This category refers to organisations/individuals who write proposals (research/programmatic/implementation) on behalf of other organisations to seek funding.
- Research:** This category refers to organisations/individuals who provide research support to philanthropies and NGOs, including broader sector-level research on the total funding given by philanthropies, compensation benchmarking for salaries in NGOs, etc.
- Technology solutions including MIS, platforms:** This category refers to organisations/individuals that provide technology-driven solutions for operations management (such as MIS, programme tracking, etc.) of philanthropy and social sector organisations.

- **Organisations focused on sector governance, including independent regulatory bodies:** This category refers to organisations/individuals which would, in their capacity as independent regulatory bodies, oversee the governance of NGOs, trusts and foundations, including adjudicate on legal problems of the sector and ensure accountability to it.
- **Organisations/campaigns promoting giving including giving circles, individual giving, payroll giving etc:** This category refers to organisations/individuals that promote a culture of giving through various events, campaigns.
- **Organisations promoting public awareness, engagement, and trust:** This category refers to organisations/individuals who promote awareness, engagement and trust in the social and philanthropy sector.
- **Volunteer management:** This category refers to organisations/individuals that recruit volunteers or develop volunteer management programmes.

ANNEXURE 2: Geographic Distribution of Service Providers and Service Seekers

Rank	Service Categories Most Used (in descending order)	States where share of NGOs and foundations is lesser than the share of support service providers	States where share of NGOs and foundations is greater than the share of support service providers
1	Organisational Capacity Building	Tamil Nadu, Delhi, Maharashtra, Arunachal Pradesh, Sikkim	Uttarakhand, Andhra Pradesh, Rajasthan, West Bengal, Jharkhand
2	Programme/Grant/Strategic Advisory	Delhi, Karnataka, Tripura, Manipur, Arunachal Pradesh	Jharkhand, Telangana, Maharashtra, Odisha, Tamil Nadu
3	Organisations Promoting Public Awareness and Trust	Uttar Pradesh, Arunachal Pradesh, Tripura, Odisha, Pondicherry	Maharashtra, Gujarat, Andhra Pradesh, Rajasthan, Bihar
4	Academic Institutions	Delhi, Karnataka, Maharashtra, Madhya Pradesh, Assam	Odisha, Jharkhand, Andhra Pradesh, West Bengal, Tamil Nadu
5	Communication	Maharashtra, Delhi, Jammu & Kashmir, Punjab, Assam	Jharkhand, Uttar Pradesh, Bihar, Rajasthan, West Bengal
6	Fundraising	Tamil Nadu, Delhi, Maharashtra, Karnataka, Assam	Jharkhand, Uttarakhand, Odisha, West Bengal, Uttar Pradesh
7	Financial, Tax and Audit	Delhi, Assam, Maharashtra, Odisha, Tamil Nadu	Rajasthan, Uttar Pradesh, Karnataka, Bihar, West Bengal
8	Volunteer Management	Haryana, Chandigarh, Madhya Pradesh, Delhi, Telangana	West Bengal, Bihar, Jharkhand, Rajasthan, Karnataka
9	Legal and statutory Compliance	Delhi, Gujarat, Assam	Uttarakhand, Bihar, Rajasthan, Jharkhand, West Bengal
10	Credibility, Transparency, Benchmarking, Accreditation	Delhi, Gujarat, Maharashtra, Assam, Odisha	Jharkhand, Rajasthan, Tamil Nadu, West Bengal, Uttar Pradesh
11	Grant Management/ Programme Implementation Support	Tamil Nadu, Delhi, Madhya Pradesh, Arunachal Pradesh, Manipur	Gujarat, West Bengal, Jharkhand, Uttarakhand, Maharashtra
12	Monitoring and Evaluation	Delhi, Assam, Tripura, Odisha, Maharashtra	Gujarat, Karnataka, Bihar, Rajasthan, Uttar Pradesh
13	Information and Knowledge	Maharashtra, Delhi, Pondicherry, Jammu & Kashmir, Punjab	Jharkhand, Uttar Pradesh, Bihar, Rajasthan, West Bengal
14	Proposal Writing	Delhi, Odisha, Tamil Nadu, Assam, Arunachal Pradesh	Jharkhand, West Bengal, Bihar, Andhra Pradesh, Rajasthan
15	Technology Solutions	Delhi, Karnataka, Telangana, Maharashtra, Chandigarh	Andhra Pradesh, Tamil Nadu, Rajasthan, Bihar, Uttar Pradesh
16	Organisations / Campaigns Promoting Giving	Maharashtra, Delhi, Telangana, Odisha, Pondicherry	Andhra Pradesh, Gujarat, Bihar, Rajasthan, Jharkhand
17	Research	Delhi, Odisha, Telangana, Assam, Pondicherry	West Bengal, Bihar, Andhra Pradesh, Uttar Pradesh, Rajasthan
18	HR and Talent Management	Delhi, Karnataka, Maharashtra, Madhya Pradesh	Odisha, Jharkhand, Andhra Pradesh, West Bengal, Tamil Nadu
19	Sector Advocacy	Maharashtra, Madhya Pradesh, Uttarakhand, West Bengal, Tamil Nadu	Gujarat, Karnataka, Jharkhand, Delhi, Odisha
20	Sector Governance	Maharashtra, Madhya Pradesh, Delhi	Odisha, Uttar Pradesh, Rajasthan, Jharkhand, Andhra Pradesh

ANNEXURE 3: Study Questionnaire

1. Your name: Please enter your full name here.
2. Your email ID: Please enter your professional email ID here.
3. Phone number: Please enter your phone number (as previously mentioned, we will not share this information with anybody else).
4. Name of the organisation: Please enter the name of the organisation that you currently represent.
5. Type of organisation: Please enter the type of organisation that you currently represent.
 - Grant-Making Foundation
 - Operating Foundation
 - NGO
 - Non-Profit Organisation
 - Others
6. PAN number: Please provide your PAN Number.
7. GuideStar India number: Please provide your GuideStar India number.
8. Areas of work: Please select the focus areas that your organisation works on. Please select more than one option, in case the organisation works on more than one focus area.
 - Education
 - Health
 - Livelihood
 - Rural Development
 - Environment
 - WASH
 - Poverty Reduction
 - Gender
 - Agriculture
 - MSME
 - Human Rights and Social Justice
 - Climate Change
 - Disability
 - Financial Inclusion
 - Governance
 - Animal Rights
9. Geographic Reach and Presence: Please select all the states that are relevant to the work of your organisation.
 - National
 - International with India Presence
 - Name of the 29 Indian States: Please select one or more than one name of the state, based on your organisation's geographic reach and presence.
10. Total annual operating expenditure of your organisation for the previous financial year: Please enter the yearly operating expenditure amount in Indian Rupees. If you don't have this information, we encourage you to get the required information from your finance and/or senior management team. This information is required so as to help us understand the size/scale of your organisation.
11. Type of support provided by external organisations or individuals that your organisation finds useful: From the list of following service categories, please select support service categories that your organisation finds useful (select all that apply).
 - Academic institutions focused on social sector talent
 - Programme/grant/strategic advisory services
 - Advocacy for policy reforms, tax and regulatory environment
 - Organisational capacity building
 - Communication services
 - Information and knowledge on the non-profit and/or philanthropy sector
 - Credibility, transparency and benchmarking organisations, including accreditation services
 - Financial, tax and audit services
 - Fundraising services
 - Grant management/implementation support
 - HR and talent management
 - Legal and statutory compliance services
 - Monitoring and evaluation (M&E)
 - Proposal writing
 - Research
 - Technology solutions including MIS, platforms
 - Organisations focused on sector governance, including independent regulatory bodies
 - Organisations/campaigns promoting giving including giving circles, individual giving, payroll giving etc.
 - Organisations promoting public awareness, engagement, and trust
 - Volunteer management
 - Others
12. Type of support provided by external organisations or individuals that your organisation has used - From the list of following service categories, please select support service categories that your organisation has used in the past (select all that apply).
 - Academic institutions focused on social sector talent
 - Programme/grant/strategic advisory services

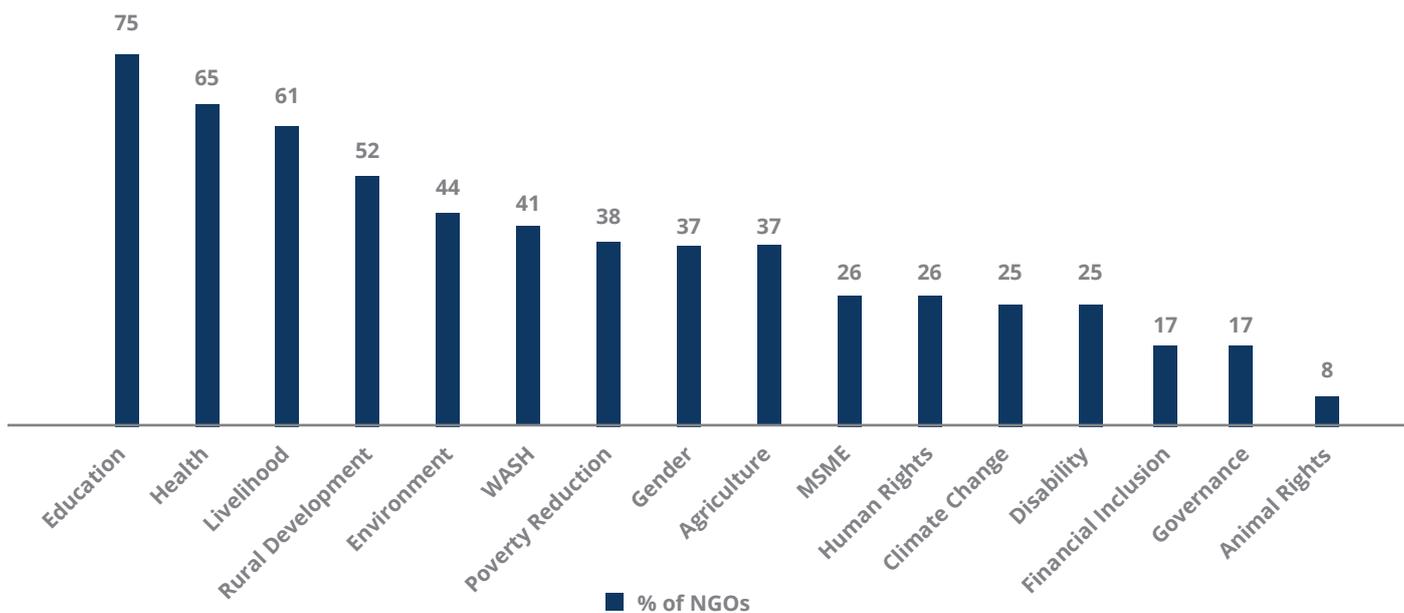
-
- Advocacy for policy reforms, tax and regulatory environment
 - Organisational capacity building
 - Communication services
 - Information and knowledge on the non-profit and/ or philanthropy sector
 - Credibility, transparency and benchmarking organisations, including accreditation services
 - Financial, tax and audit services
 - Fundraising services
 - Grant management/implementation support
 - HR and talent management
 - Legal and statutory compliance services
 - Monitoring and evaluation (M&E)
 - Proposal writing
 - Research
 - Technology solutions including MIS, platforms
 - Organisations focused on sector governance, including independent regulatory bodies
 - Organisations/campaigns promoting giving including giving circles, individual giving, payroll giving etc.
 - Organisations promoting public awareness, engagement, and trust
 - Volunteer management
 - Others
13. Contact Details: Please enter the contact details of as many organisations or individuals that have provided your organisation service under each support service category.
- Name of the organisation or individual providing that specific support/ service
 - Name of the city where the support organisation/ individual is based
 - Email id of the support organisation/ individual
 - Phone number of the organisation providing the support
-

ANNEXURE 4: Profile of Sampled Respondents

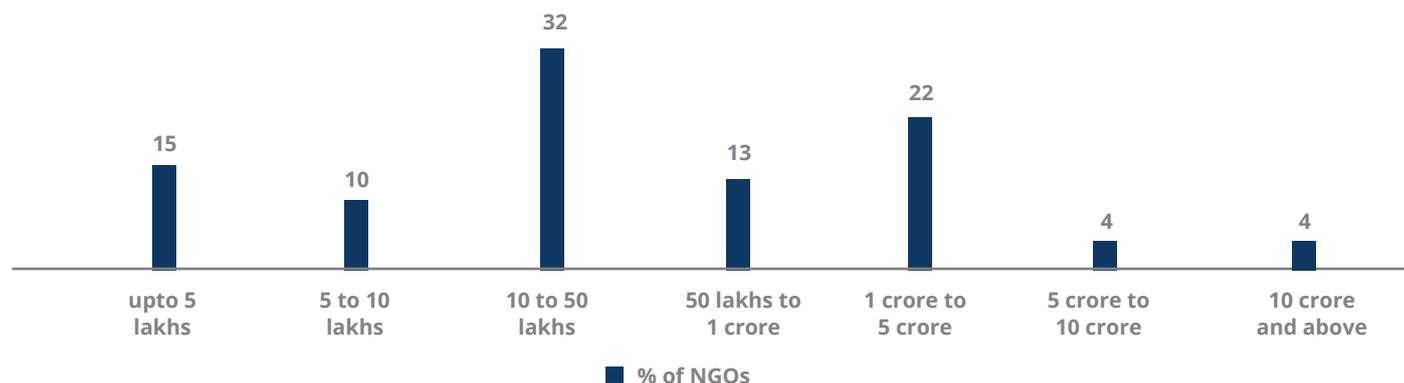
The study sample consists of responses from 800 NGOs and 67 philanthropic foundations. The following section outlines the characteristics of the sample respondents by examining their geographic spread, thematic areas of work as well as organisation size (in terms of their annual operating budget).

NGOs

- The NGO sample consists of organisations primarily working in education, health and livelihood, with more than 60 percent of NGOs responding as working in these areas.
- 30 to 40 percent of the organisations in our sample work on thematic areas such as poverty reduction, gender, agriculture, WASH and environment.
- Organisations working in thematic sectors such as governance, finance inclusion, disability, climate change, human rights and social justice are in the range of 15 to 25 percent of the total sample.
- The geographic distribution of sampled NGOs by their operation maps the states in which NGOs work and provide their services. Overall, a large proportion of NGOs in our sample operate in Maharashtra, Uttar Pradesh, West Bengal and Tamil Nadu.
- The organisation size of the NGOs in our study is measured by the organisation’s annual operating budget.
- As depicted in the graph below, the study sample is well-spread across different operating budgets, with the maximum percentage of NGOs falling in the INR 10 to 50 lakh budget category.



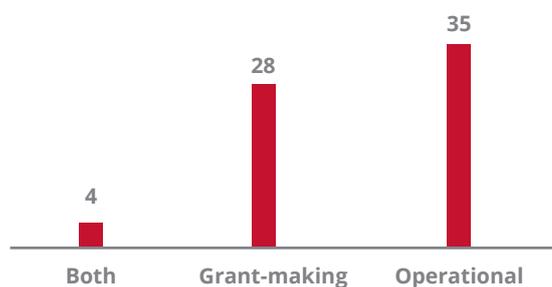
Graph 8: Thematic Distribution of NGOs



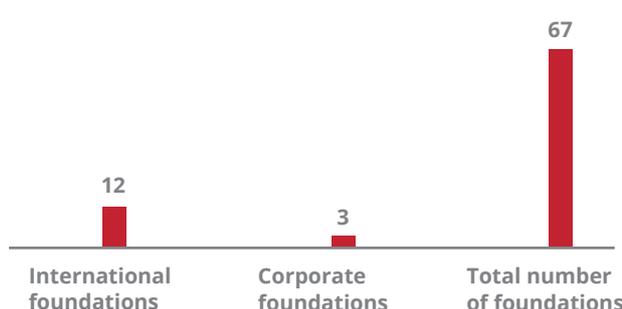
Graph 9: Distribution of NGOs by Annual Operating Budget

Foundations

- The graph highlights the types of foundations represented in the dataset. Operational foundations make up 52 percent of the dataset (35 in number) and grant-making ones make up 42 percent of the dataset (28 in number).
- Organisations which are both operational and grant-making are a miniscule section of the dataset.
- The share of international¹⁶ and corporate foundations are also limited in the dataset.
- The graph (below) highlights the proportions in which foundations work across various thematic areas of work.
- The highest number of foundations work in areas of education and health.
- Livelihoods and environment are also key areas of work, but lag far behind education and health. Climate change, while linked to environmental issues, is among the least favoured areas of work.
- Agriculture, despite being a key component of the Indian economy, attracts the focus of only 30 percent of the foundations in the dataset.
- In terms of the geographic presence of foundations across Indian states, Maharashtra is the top destination (22 percent) followed by West Bengal, Delhi and Uttar Pradesh. These three states are at a six, nine and nine percent point difference, respectively, from Maharashtra.
- 21 percent and 13 percent of the foundations in our dataset have a national and international reach, respectively.
- The greatest percentage of foundations (33 percent) have an operating budget of up to INR 10 lakh. The smallest percentage of foundations in the sample fall into the budget category of INR 50 lakh to 1 crore.
- Operating foundations significantly outnumber grant-making foundations in the budget category of up to INR 10 lakh.
- 12 percent of the foundations sampled did not provide details of their operating budget, which indicates reticence in sharing this information.



Graph 10: Number of Foundations by Typology



Graph 11: International vs. Corporate Foundations



Graph 12: Thematic Distribution of Foundations

¹⁶International foundations include those which have self-reported an international presence and those which have not but whose websites indicate an international scope of operations.



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