

YOUR  
PHILANTHROPY  
ROADMAP



**DASRA**, meaning ‘enlightened giving’ in Sanskrit, is a pioneering strategic philanthropic organization that aims to transform India, where a billion people 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.

**ROCKEFELLER PHILANTHROPY ADVISORS (RPA)** is a nonprofit organization that currently advises on and manages more than \$200 million in annual giving. Headquartered in New York City, with offices in London, Chicago, Los Angeles and San Francisco, it traces its antecedents to John D. Rockefeller Sr., who in 1891 began to professionally manage his philanthropy “as if it were a business.” With thoughtful and effective philanthropy as its one and only mission, RPA has grown into one of the world’s largest philanthropic service organizations, having overseen more than \$3 billion to date in grantmaking across the globe. RPA provides research and counsel on charitable giving, develops philanthropic programs and offers complete program, administrative and management services for foundations and trusts.

Dasra acknowledges the kind support of **SAMPRADAAN** (1996-2015), whose pioneering mission was to encourage organised, informed, effective and regular giving of time, talent and other resources to meet important societal needs; secure and maintain an environment conducive to philanthropy by increasing awareness and appreciation of its role by people, corporations, and the state; and improve philanthropic practice by offering professional inputs.



Building a plan for your philanthropy and taking the first step in your giving journey, while exciting, can also be an overwhelming experience. This brief guide is designed to simplify your planning process and provide an overview of issues that you may want to consider as you carve your own path to **thoughtful, effective philanthropy**.

It is not uncommon for givers to spend months, or even years, building and solidifying their philanthropic roadmap. What is important is to **be patient, take small steps forward, be open to learning along the way, and take time to enjoy the journey**.

An adaptation of the guides by Rockefeller Philanthropy Advisors, this guide brings you learnings and stories from Indian philanthropy. Should you decide to learn more, **WWW.DASRA.ORG** and **WWW.ROCKPA.ORG** have additional references, resources and information that can assist as you create your own route to strategic giving.

# FIVE MILESTONES

Strategic philanthropy starts with recognizing your motivations to give and identifying the issues you want to tackle. It also goes beyond that to having a clear vision of what change you want to see, what approaches you can take to get there, how you can gauge success, and who you can work with along your journey.

The objective of this guide is to outline key milestones on your philanthropic journey and introduce you to a process that can help you develop your own giving plan. Like any good planning tool, the Roadmap is a series of guiding questions with options—not a set of answers.

We recommend that emerging philanthropists consider working through these questions with their advisors and their families as way to create not only a strategic framework, but an outline of how to operate their giving plan.

Ultimately, there is no right and wrong in philanthropy—the most effective giving plan is one that aligns most closely with your own values, goals and capabilities.

# 1

## WHY ARE YOU GIVING?

### MOTIVATIONS

People have many motivations for philanthropy, which often change over time and with experience. The more a giving program addresses the needs that drive these motivations, the more likely it is to be sustained or successful. And because some motivations may be mutually exclusive, or at least hard to integrate, they should be clearly articulated, so that decisions can be made about how to balance various priorities.

Many donors want their values to inform their philanthropy. Identifying motivations makes it easy to clearly include them in giving strategies and assessments.

Here is a list of categories—not exclusive by any means—to help you begin to think about your own motivations:

### FAMILY

Honoring and appreciating ancestors can be among the strongest of motivators. Our upbringing imprints upon us values and experiences which we often seek to reinforce

through our giving. Family is a major influencer, but sometimes new generations set out to break into new areas of giving with a fresh set of philanthropic principles. Giving can also serve as a glue that binds the family together for a common purpose.

"I always joke that my father is a first-generation entrepreneur and I am a first-generation inheritor. I believe that when there has been a substantial amount of wealth created, and one generation decides to set aside a part of that wealth for philanthropy, it's very important for the following generations to understand that **more than an inheritor, you are a custodian of that wealth and that tradition of giving.**"

**ROSHNI NADAR, HCL CORPORATION | SHIV NADAR FOUNDATION**

#### HERITAGE

Ethnic or national identity can create a set of important values as well as an impetus to support and honor that heritage. For example, Indian diaspora donors often seek to help the communities from which their families emerged and are a global force moving millions of dollars to India each year.

"While we also fund in the U.S., my parents wanted to focus our philanthropic efforts in India because **it was where they felt they were given the initial opportunities and education to pursue their goals.**"

**SAPPHIRA GORADIA, VIJAY AND MARIE GORADIA FOUNDATION**

### LEGACY

Those motivated by legacy seek to influence the future. Donors may want to be remembered for more than financial success. Their philanthropy is their public commitment to making a better world. Other legacy donors want to create a family culture of generosity and public service. They seek to pass down values as well as resources to the next generation. Having their family involved in philanthropy is deeply meaningful to them.

### FAITH

Many donors center their giving around their spiritual beliefs and/or religious practice, supporting not only their house of worship but also organizations and causes that they learn about through their community of faith.

"Why I give and the cause close to my heart is very much determined by my religion. I follow the Baha'i Faith, a religion founded over 150 years ago. It calls fund-giving the 'life blood of the faith.' We are also required under the Baha'i law to give a certain percentage of our savings every year to the fund. So my wallet is almost entirely committed to donate to the Baha'i fund."

**ZIA MODY, AZB & PARTNERS**

### EXPERIENCE

Often, inspiration to give comes from an individual's own life. For example, people who have benefited from scholarships, or see education as the foundation of their success, often wish to create that opportunity for others. Those who have faced a serious medical issue or have seen a loved one suffer from medical problems can be inspired to tackle that problem through

philanthropy. Those who get deep joy from the arts may wish to provide others with the experience of beauty. People who travel widely—for business or pleasure—may confront challenging conditions and see opportunities to change them.

#### **PROBLEM-SOLVING**

Analysis-driven donors lead from their head rather than heart when articulating their philanthropic goals. They aspire to look objectively at what the biggest needs are, or what issues can be successfully addressed with philanthropic resources. This often frames how they define their motivations as well as their goals and strategies.

#### **MORAL RESPONSIBILITY**

Many donors are motivated by a sense of moral duty to give back to society. Sometimes, this is driven by the belief that society plays an important role in helping one accumulate their wealth in the first place. The vastly unequal distribution of wealth in India is another factor that often ignites a sense of moral responsibility to give to those less privileged.

"I think philanthropy is a duty that you have to discharge to your fellow human beings. When you do very well and get more than what you need, then you must see what you can do for others who are less fortunate than you are. I felt guilty that I had come into wealth at an early age when so many people around me had not. I felt I owed something to those who were born into deprived circumstances."

**MOHANDAS PAI, MANIPAL GLOBAL EDUCATION SERVICES |  
AKSHAYA PATRA FOUNDATION**



### **PERSONAL SATISFACTION**

Many donors undertake philanthropy for the sheer joy it gives them. They find it truly rewarding to engage in something that provides a sense of exhilaration and higher purpose.

“Philanthropy is really so much fun. Intellectually, spiritually, mentally, **there is just so much joy in giving.**”

**ROHINI NILEKANI, NILEKANI PHILANTHROPIES**



# WHAT DO YOU WANT TO ACHIEVE?

## YOUR GOALS

In our experience, donors make the most sustained and successful contributions when they focus on issues that connect directly to their motivations and convictions. We recommend a three-step process here.

### 1

#### CHOOSING A BROAD AREA

Different lenses on the world help us focus and sort what we see. Here are a few to get you thinking:

**CAUSES** Some philanthropists start with identifying ecosystem-level challenges such as poverty, education or climate change. Others may already have specific challenges in mind that they want to tackle. For instance, someone interested in education might look closely at early childhood education and someone interested in healthcare may choose to focus on nutrition programs.

**POPULATIONS** Some donors will concentrate on the types of communities they wish to support. Women, children, adolescents, the elderly, tribals, animals—the possibilities are many.

“We work with the Musahars, or the rat-eating community in Bihar. When they don’t have enough to eat, they eat rats—even today! There are 4-5 million Musahars in India and they live with no hygiene, no education, no primary healthcare. This is unimaginable! With my experience and staff, I was determined to help them.”

**ASHOK BHANSALI, BHANSALI & CO. | BHANSALI TRUST**

**GEOGRAPHIES** Place-based funders are often driven by heritage or experience. They may fund many different issues within a geography. That geography can vary greatly—from a continent or region to a village or a neighborhood.

“We adopted a holistic 360-degree approach whereby we decided to take one geography and pour all our inputs into it to ultimately build a model of development. We focused on water and sanitation, health, education, agriculture and livelihood—all in one geography.”

**ZARINA SCREWVALA, UTV GROUP | SWADES FOUNDATION**

**INSTITUTIONS AND LEADERS** Some funders will want to support institutions that they care about or believe make a difference. For example, they may choose to give to their alma mater or to a museum that they believe is of significance. Funders may also choose to support leaders they find inspiring and think of as highly capable of creating large-scale change.

## 2

### **NARROWING THE FOCUS**

Once you've identified the area(s) of concentration for your philanthropy, you will need to narrow your focus. Broad fields like education and healthcare are common categories, but are obviously too big for any donor to tackle. You'll want to look at the components of those fields—for example in education it may be early learning; primary or secondary school; or higher education. Even within those areas you'll probably need to move to a more specific focus as you move forward in your giving journey.

Researching the work of organizations currently working within your broad sector of interest, visiting program sites, and speaking to nonprofit leaders and development practitioners are few tactics that will help you hone in on your specific areas of focus.

It is important to note that a narrow focus doesn't have to mean a single focus. For a large number of donors, their interests may span more than one topic. Thus, the question may not be which issue area to focus on but rather what combination of issue areas to support.

**DEFINING THE OUTCOME YOU SEEK**

Thoughtful philanthropy means not only having a clear focus on the challenge you want to tackle, but also having a clear vision of what change you want to see. Whether you call it a goal, an outcome or a solution, it's important to define the desired end result. For instance, if you are focusing on education, your desired outcome may be increasing the school enrollment rate, raising the rate of secondary school completion, or achieving improved learning outcomes among students. Defining the desired outcome will further help drive clarity and focus to your philanthropy.

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## FINDING THE FOCUS

### HEMENDRA KOTHARI, DSP BLACKROCK | WILDLIFE CONSERVATION TRUST

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**B**elonging to the fourth generation in a family of stockbrokers, Hemendra Kothari is known in financial circles today as one of India's most trusted and accomplished investment bankers. Founder of DSP Financial Consultants, he entered into a joint-venture with Merrill Lynch and later sold his stake to it. Today DSP is in a joint-venture with BlackRock, the largest asset management company in the world.

However, this is but one side of Kothari's achievements. In 2001, he founded the Wildlife Conservation Trust (WCT) to safeguard India's life-giving ecosystems in a sustainable manner. Yet, his philanthropic focus wasn't neatly defined from day one—from identifying wildlife conservation as his interest area to recognizing the need to focus on community development, Kothari's journey has been a deeply personal one, defined by constant learning and evolution.

Influenced by his forefathers who largely gave to education and healthcare, Kothari began his giving journey by continuing their

philanthropic legacy. With time, his interests started expanding to other areas. After college, he visited Corbett National Park and saw his first big cat—a leopard. This sighting sparked his passion for wildlife that then took him and his family on several safari trips across India and Africa. While this began as a pleasure-filled activity, his interest grew and he began speaking with forest officials about the problems they face. He realized that the parks were in severe need of funding, and started giving to welfare funds.

Kothari then began meeting sector experts and studying the work of existing wildlife organizations to better understand the issues surrounding conservation. Through this, he recognized the inextricable connectedness between people and ecosystems and the significance of providing education, livelihoods and healthcare to communities living around forests. Today, WCT works in over 130 national parks and sanctuaries across India, partnering with the government to secure wildlife habitats and catalyze the upliftment of marginalized communities.



# 3

## HOW DO YOU THINK CHANGE WILL HAPPEN?

### YOUR APPROACH

Once you have solidified your vision of what change you want to see, it is important to understand how you want to go about creating this change.

#### 1

##### DEFINING THE PATHWAY TO CHANGE

The method by which you believe change will happen is called a strategy, a theory of change, a logic model, or an approach. The term you choose to use is of no particular importance. What is critical is to answer the “how” question: How will philanthropy help achieve the goal you have identified? Undertaking this exercise will help you understand and clearly articulate the relationship between the issue you are addressing and the activities you are undertaking to tackle it.

After you narrow your focus and define the outcome you wish to achieve, the following steps will help you systematically

arrive at the “how” and identify the pathway to achieving your desired change:

**UNDERSTAND THE ROOT CAUSE(S) OF THE PROBLEM** What is driving the problem and where is the issue rooted?

**CONDUCT FIELD SCAN** Who else is working on addressing this issue? What can you learn from them? What has previously worked or not worked in tackling the problem?

**IDENTIFY LEVERS OF CHANGE THAT INFLUENCE YOUR WORK** What must be done to move the work forward? What levers (eg, community, business, government) will create lasting change? Where should you intervene?

**CONSIDER APPROACHES TO ADDRESS THE PROBLEM AND ADVANCE SOLUTIONS** How can you select from a range of strategies (eg, supporting research, awareness, or policy efforts) to achieve your goals? What is your “if-then” theory? For example: “If I increase the number of awareness sessions on the importance of safe and healthy sanitation practices, girls in the community will be more likely to utilize the sanitation facilities.”

In many cases, though, the path will not be so clear. You may be faced with competing theories—all compelling, perhaps none of them proven. You’ll have to make an informed choice—informed by the facts available, the thinking behind various theories of what might work, and your own convictions and comfort level about what sort of investment you’re willing to make.



Once you have settled on the approach to take to reach your goal, you can put some thought into tactics. The following sections outline some questions to ask yourself, and these are choices with no right answers. Your choices may change as your experience changes your perspective and as other factors in your life evolve.

## 2

### **DETERMINING THE NATURE OF YOUR SUPPORT**

**DO YOU WANT TO FUND EXISTING ORGANIZATIONS OR START YOUR OWN?** Are there organizations that are already effectively carrying out the work you wish to do or do you see a gap? Is there a need to establish a new organization to tackle the problem?

**HOW CONCENTRATED DO YOU WISH TO BE?** Do you want to spread your philanthropic investment across multiple organizations or go deeper with a smaller number of organizations?

**HOW LONG DO YOU WISH TO ENGAGE WITH YOUR GRANTEES?** Are you willing to engage with organizations on a long-term, sustained basis so as to provide them with greater resources and time to achieve longer-term impact? Or do you prefer to start short-term to gauge the effectiveness of the organization and your giving?

**HOW WILLING ARE YOU TO TAKE RISKS?** Do you wish to support innovative ideas and programs or see a proven idea scale?

**ARE YOU OPEN TO FUNDING SPECIFIC PROGRAMS AS WELL AS AREAS OF CAPACITY BUILDING?** Do you want to fund specific programs that impact the beneficiary directly? Are you willing to fund areas like leadership development and operations that help build the institutional capacity of an organization and allow it to be more effective in its work? Do you want to fund operating programs, or make capital grants?

“Donors typically prefer to spend their money directly on the cause and not on building the infrastructure that will allow the nonprofits to be more effective. For example, you need systems and processes, financial controls, monitoring mechanisms, and technology. **There is an urgent need to help organizations grow so they can scale and become sustainable.**”

**N.S. RAGHAVAN, INFOSYS | NADATHUR TRUST**

### 3

#### **DECIDING WHAT RESOURCES YOU WILL BRING TO THE TABLE**

**HOW MUCH DO YOU WANT TO GIVE?** How does your current and projected wealth compare with the amount you want to set aside for your personal and family living expenses, investments and savings? How do you want to disburse your philanthropic capital over time?

**HOW ACTIVE DO YOU WANT TO BE? ARE THERE OTHER NONFINANCIAL RESOURCES YOU WANT TO BRING TO YOUR PHILANTHROPY?** Do you want to be personally involved in researching areas of giving, in meeting with nonprofit leaders

and other funders, in reviewing potential grantees, in reading proposals and structuring agreements, and in monitoring progress? Do you have relevant expertise and skills that you can contribute to an organization?

“At EkStep, I use my technical background because it is essentially a tech platform designed to address literacy and numeracy at scale using smart phones. I use my networks from all the years I’ve been working—in business and government, globally and in India. *I bring in anybody who I feel can help us solve the problem.* It’s very important to use your networks and skills to amplify your philanthropy so you reach your goals faster.”

**NANDAN NILEKANI, INFOSYS | EKSTEP**

**HOW PUBLIC DO YOU WANT TO BE?** Do you prefer to give anonymously? Are you willing to lend your networks and voice to influence philanthropy?

“*I think givers should talk about their philanthropy so that their work proves inspirational for others to follow.* Having put myself out there, I’m very conscious of it now, so I try that much harder.”

**RAKESH JHUNJHUNWALA, RARE ENTERPRISES |  
R JHUNJHUNWALA FOUNDATION**

**DESIGNING HOW YOU WILL BE ORGANIZED****WHAT WILL BE THE MECHANIC OF YOUR PHILANTHROPY**

**PROGRAM?** Will you use a foundation? A donor-advised fund? Direct giving? Some combination of these? If you're actively involved in business, how will your philanthropy be separate from or connected to your business?

**HOW WILL THINGS GET DONE?** How will regulatory and investment matters be handled and coordinated? Will you need staff? Will you outsource the functions you don't want to handle? Do you wish to include someone from outside your family to participate in decision making and governance?

# 4

## HOW WILL YOU ASSESS PROGRESS?

### ASSESSING YOUR PHILANTHROPY

When we invest in a business, we look for results at the company level. In the nonprofit sector, we also look at how the nonprofit organization can deliver programs that will bring about sustainable change in the community or even the world.

Assessing such societal change is difficult. Multiple variables, including the huge range in time horizons among philanthropic endeavors, make cause and effect hard to pinpoint. Some vaccinations offer the prospect of simultaneous treatment and cure. However, medical research can take decades. Most social challenges—poverty, lack of human rights, climate change—have time horizons that in some cases may have no real endpoint.

All we can hope for is to make some progress in our lifetime. Does this mean that donors should walk away from thinking about impact at the system level? Not at all. Without considering the broader context, donors run the risk of funding “successful” programs that make no real difference.

Approaches to assessment may range from evaluation of long-term results, evaluation of the activities as they unfold and even return on investment in regard to social entrepreneurship. Moreover, assessments can be qualitative or quantitative in nature and each may have several methods and levels of rigor. For now, it is important that you understand that assessment—while a mix of art and science—is an important part of the philanthropic endeavor. Regularly reviewing the results of your giving allows you to learn and revisit previous steps of your roadmap. An annual portfolio assessment often helps in regularly evaluating the learnings and accordingly adjusting your approach.

“There are a set of metrics that you can use to measure how well your philanthropy is working. Without this, you’re putting money in a bottomless pit and you won’t get the returns you’re looking for.”

**KIRAN MAZUMDAR SHAW, BIOCON | BIOCON FOUNDATION**

# 5

## WHO WILL JOIN YOU?

### INVOLVEMENT

Often, philanthropists will involve others in their journey in order to access greater resources, build knowledge, learn best practices, multiply impact, or simply share the joy of giving. Here are some questions to think about as you consider who will join you along your philanthropic journey.

**DO YOU WANT YOUR FAMILY TO BE INVOLVED?** For many donors, undertaking philanthropy with their family is an important way to share significant experiences, learn together, develop a legacy, and transmit values.

However, the planning process can sometimes be very challenging when there are multiple philanthropic decision makers. This is best approached through a strategic planning process that allows each participant to explore and express his or her motivations, choice of issue area(s), and preferred approach. Once those ideas are on the table, many family members find themselves impressed and inspired by the views of others. Even so, some difficult decisions about priorities and proportions will need to be made.

"Of course, you can have different opinions on a particular issue, but at some stage, you need to reach common ground as a family. For example, my daughter approached me regarding an organization in mental health that had limited impact in terms of numbers. I told her that I didn't want to support it because I'm looking at large numbers. But she insisted that numbers aren't everything; that supporting a research-based organization can help us become a thought leader. That conversation completely changed my view. *So it's okay to differ, but that difference of opinion has to galvanize into an alignment at some point, so we can maximize the weight of the family behind the cause.*"

**HARSH MARIWALA, MARICO LTD. | MARICO INNOVATION  
FOUNDATION | MARIWALA HEALTH INITIATIVE**

**DO YOU SEEK TO LEVERAGE YOUR PHILANTHROPIC EFFORTS BY COLLABORATING WITH OTHERS?** The scale of India's problems is large, and the change needed is immense. It is through meaningful engagement and partnerships with a range of stakeholders such as other funders, government, nonprofit organizations, businesses, academic institutions and think tanks that givers can learn and multiply the impact of their efforts. It is important however, to collaborate only once you recognize the true need for or value-add of working with the potential collaborators. Moreover, working in collaboration may mean that you will have to give up some control to your partners, which you must be ready for. Finally, it is worth recognizing the difference between fundraising and collaboration—terms that



are often mistakenly used interchangeably. While fundraising is an effort to mobilize people to follow your lead and commit financially to what you have supported, collaboration often goes beyond funds and signifies partnerships on various levels, such as knowledge, networks and other resources.

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### MAGNIFYING IMPACT THROUGH COLLABORATION

ASHISH DHAWAN, CHRYSOCAPITAL | CENTRAL SQUARE FOUNDATION

SANJEEV BIKHCHANDANI, NAUKRI.COM

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**A**round 2007-08, Ashish Dhawan, a leading private equity investor, and his friend Sanjeev Bikhchandani, founder of naukri.com, talked over lunch about the domination of the Indian higher education landscape by technical institutes. They lamented the lack of a true liberal arts university in India that builds important 21st century skills such as critical thinking, communication and leadership, the absence of an Indian university in the world's top 100 educational institutions, and the dearth of globally renowned scholars living in India.

Dhawan and Bikhchandani, both first-generation entrepreneurs with strong visions for a better India, agreed that the time to lament had passed. Their

goal was to establish “not just a top liberal arts university, but an Indian university that would feature in the top 100 in the world and bring back the liberal arts tradition in India.”

They shared their idea with a group of like-minded, wealthy individuals in their network. After Dhawan and Bikhchandani committed significant capital of their own, others followed. What started out as two individuals' aspiration, is today Ashoka University, a result of nearly 100 individuals and corporates coming together and contributing a total of over 850 crore rupees—an effort that makes this the largest instance of collective philanthropy in the Indian education sector.

However, it wasn't only financial capital that the founders brought to the table. While Dhawan leveraged his private equity experience to lead fundraising efforts for the University, Vineet Gupta, Managing Director of Jamboree Education, worked to secure land and regulatory approvals from the Haryana government. Pramath Raj Sinha, another founder, focused on courses and faculty. Several others offered their time to mentor students, help them secure internships and jobs, or foster collaborations with international universities. "Some end up getting more involved than others, but they are all pitching in with time and intellectual energy," said Sinha.

Today, Ashoka University has a strong Academic Council of scholars around the world leading pedagogy and curriculum development, eight Centres of Excellence that conduct research and convene scholars, and strong partnerships with leading international institutions. Moreover, it is deeply committed to inclusion and diversity, having the largest needs-based financial aid program in the country. As Bikhchandani reflected, "Collaboration is critical simply because you can't do great things alone. You can't build a truly holistic

solution without engaging with other kinds of stakeholders. We felt if we can make one Ashoka succeed, hopefully 100 others will follow our model."

\*This case is limited in its ability to name every individual that played a role in founding Ashoka University, but in no way intends to diminish their invaluable contributions.

# MOVING FORWARD

There is much to consider in building your own giving strategy and starting your own philanthropy.

Great philanthropists—like great business leaders—take inspiration from their intuition, personal insight and passion, but they build their good works on a foundation of planning and experienced advice.

In other words, you don't have to do this alone. In fact, we recommend that you involve your personal advisors, private wealth managers and family from the beginning. You can also engage with intermediary organizations to help you chart your roadmap. Joining networks like the India Philanthropy Initiative, participating in philanthropy education programs, and attending philanthropy events like Dasra Philanthropy Week will help you connect with peers and social sector leaders to further enrich your learning and propel you forward on your path to thoughtful and strategic philanthropy.

The other thing to remember is that thoughtful philanthropy is just that—thoughtful. And thinking takes time. Finally, there are no right answers—each person's philanthropy roadmap is unique and for one's self to discover. What's important is having the drive to give, being open to learning, and taking the first step on your exciting journey of philanthropy.



1

**WHY ARE  
YOU GIVING?**



2

**WHAT DO  
YOU WANT TO  
ACHIEVE?**



3

**HOW DO YOU  
THINK CHANGE  
WILL HAPPEN?**



4

**HOW WILL  
YOU ASSESS  
PROGRESS?**



5

**WHO WILL  
JOIN YOU?**

You might want to reflect on these points as you consider your next steps:

**MAKE AN EFFORT TO UNDERSTAND WHY YOU WANT TO GIVE** to allow your giving to be its most meaningful.

You have many options when it comes to choosing your issues and what approaches to use to achieve your desired outcomes. **RESEARCH THOROUGHLY. THESE CHOICES WILL DETERMINE THE PARAMETERS OF YOUR PHILANTHROPY. THEY SHOULD BE INFORMED CHOICES.** Still, there will be aspects that you will only learn along the way.

While making strategic choices is important, **IT IS ALSO CRITICAL TO PLAN FOR IMPLEMENTATION.**

Where decision making will be shared with others (spouse/partners; children/grandchildren; siblings), **THERE SHOULD ALWAYS BE CLARITY AND SOMETIMES COMPROMISE.**

Enjoy the journey. **ASK YOURSELF THE QUESTION—IS IT POSSIBLE TO DESIGN DISCOVERY AND FUN INTO THE PROCESS OF GIVING?**

“Start small, and once the organization can communicate to you the impact of your giving, your heart will lead you to doing more. You will end up finding the time, and giving will come naturally without you realizing where it’s coming from. *So if you’re interested, just start—everything else will flow.*”

**ADITI KOTHARI, DSP BLACKROCK | WILDLIFE CONSERVATION TRUST**

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ROCKEFELLER  
Philanthropy  
Advisors

