

Accelerate Indian Philanthropy - Baseline Questionnaire: Understanding Your Giving Mindset

A. Exploring Your Giving Inspiration and Motivations

Philanthropy has the power to champion long-term social change by investing in the welfare of people. Jamshedji Nusserwanji Tata, the father of India's institutional philanthropy, Azim Premji, a stalwart philanthropist who has contributed significantly to India's rural development and education, as well as Bill Gates, whose foundation has positively transformed global health, have proven that with their open-handed giving and vision for a better world. In the philanthropic world, these individuals serve as role models whose work encourages others to give more, sooner, and better.

Full Name: _____

1. Who is the inspiration behind your philanthropy?

Answer: _____

2. Why has their philanthropic journey inspired you?

Answer: _____

3. What are the top three motivations for you to give?

(Highlight all that apply)

- ☐ Giving Back to Society
 - ☐ Fulfilling a Sense of Duty
 - ☐ Carrying a Legacy Forward/Creating a Legacy
 - ☐ Contributing to Nation-Building
 - ☐ Experiencing the Joy of Giving
 - ☐ Using Business/Entrepreneurial Skills to Solve Social Problems
 - ☐ Connecting with Like-Minded Individuals
 - ☐ Other: _____
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B. Your Philosophy of Giving

Different philosophies guide different philanthropists. Which philosophies of giving resonate with you the most? Highlight the options most relevant to you.

Aspect of Giving	Option 1	Option 2	Option 3	Other (Specify)
Focus of Giving	I prefer to focus my giving on a single cause	I prefer to support multiple causes as opportunities arise	I prefer to engage with multiple causes through a structured, long-term approach	
Approach Towards Giving	Trust-based: Support good credible orgs, trusting them to utilise the funding optimally	Outcome-based: Support good credible orgs holding them accountable to agreed milestones and outcomes		
Duration of Support	I prefer to give one-time support	I prefer to give for a short/defined period	I prefer to give for as long as needed/perpetuity	
Type of Solution	I prefer solutions with proven impact and evidence	I prefer piloting new innovative		
Type of Impact	I prefer solutions that drive visible and immediate impact	I prefer solutions with long-term and sustainable impact		
Scale of Impact	I prefer targeted and deep impact for defined beneficiaries	I prefer a large/population-level scale of impact		

C. Family Approach to Philanthropy

Family support is a major factor for Indian philanthropists, as their loved ones give them encouragement and a shared sense of purpose. Engaging the whole family in one's philanthropic pursuits can foster a culture of giving and compassion that transcends generations and aids crucial decision-making around wealth allocation.

1. Is your family aligned on a collective vision for your philanthropy? If partially aligned or not aligned, what are the areas of difference?

(Highlight all that apply)

- Prioritization of causes

- Allocation/quantum of funds
- Different approaches to giving
- Level of involvement required
- Other: _____

2. How does your family feel about philanthropy?

Family members ↓	Sentiment towards philanthropy →	They are supportive of my decision to give	They are ambivalent/neutral about my decision to give	They are against my decision to give	Not applicable
Spouse/partner					
Parents					
Child					
Child					
Other family members					

3. Who are the relevant stakeholders from your family supporting you in various domains below?

Domain	Active Decision-Making	Advisory Role	Occasional Involvement	Other (Specify)
Cause Selection				
Quantum of Giving Type of Giving Vehicles				
Selection of NPO Partners				
Monitoring & Evaluation				

4. How often does your family discuss philanthropy as a collective?

- Regularly (e.g., quarterly meetings)
- Occasionally (e.g., during annual planning)

- Rarely
- Other: _____

5. Do your family members participate in any philanthropic initiatives independently of the family's collective efforts?

- Yes
- No

6. If yes, what are the nature and scope of these independent initiatives?

Answer: _____

7. Has your family established formal structures or processes for philanthropic decision-making (e.g., a family foundation or council)?

- Yes
- No

8. If yes, please provide details on how these structures operate:

Answer:

D. Challenges to Your Philanthropic Giving

The desire to do philanthropy does not always translate into action owing to some challenges givers face at different stages of their philanthropic journey.

1. Personal Reasons That May Prevent Greater Giving

(Highlight all that apply)

- CSR is my way of engaging with philanthropy
- I am already paying taxes. The government is responsible for socio-economic development
- I do not have the time to engage in philanthropy
- I am awaiting liquidity; hence I cannot engage in philanthropy
- Other: _____

2. Structural Reasons That May Prevent Greater Giving

(Highlight all that apply)

- I have not found the right organizations to commit to/partner with
 - Non-profits do not think strategically enough. Their work doesn't inspire confidence
 - Non-profits do not report credible outcomes well
 - I cannot support an organization forever, and exiting will cause disruptions
 - The regulatory regime surrounding philanthropy is not conducive to giving
 - Other: _____
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3. Cultural Challenges That May Prevent Greater Giving

(Highlight all that apply)

- The conversation around philanthropy is limited in India
 - There is a culture to preserve wealth for future generations
 - India does not celebrate givers
 - I am already doing charity
 - Other: _____
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4. Please mention any other challenges not mentioned above:

Answer:

E. Articulation of Your Philanthropic Identity

A key insight from our latest Philanthropist study report is that givers can be categorized into distinct philanthropic archetypes. While givers may personify different archetypes at different stages of their giving journey, they often have one dominant persona. Identifying your philanthropic archetype is essential to shaping the future direction of your giving.

Which archetype do you identify with today?

(You can choose more than one if you prefer)

- **Inspiration Seekers:**
These are individuals on the verge of starting their philanthropic journey. They are most likely engaged in Corporate Social Responsibility (CSR) activities and/or dedicate some resources to donate for spontaneous philanthropy or to respond to

calamities. They are currently not personally involved in philanthropy in a sustained manner.

- **Emerging Givers:**

These are individuals who have already embarked on their philanthropic journey and regularly allocate at least a small percentage of their financial resources (Treasure) to philanthropy but are yet to evolve their giving philosophy or get personally involved.

- **Strategic Enablers:**

These are individuals who give generously of their time, talent, and ties to philanthropy, which is their main mode of engagement. They are passionate givers who get personally involved and work to stimulate the broader philanthropic ecosystem.

- **Cause Champions:**

These are individuals who are deeply committed to one or more select causes or communities. They get personally involved and give their time, talent, and ties as well as financial resources (Treasure) generously, but in a very concentrated manner to their focus area or organization. They are evangelists for their chosen cause but may or may not choose to evangelize for the cause of philanthropy in general.

- **Core Givers:**

These are individuals who are committed, long-term funders of NPOs and form the backbone of the social sector. They give substantial financial resources (Treasure) and also try to help in other ways for the causes and organizations that align with their philanthropic vision. They are most likely to fund a variety of NPOs.

- **Rainmakers:**

These individuals work to change sub-optimal systems holistically rather than fix solitary problems. They experiment with multiple models, methods, and solutions and then try to scale what works. They give freely of their monetary contributions (Treasure) as well as their time, talent, and ties. They evangelize passionately for philanthropy to the extent that their philanthropic identity is their most cherished identity.

If you feel that your philanthropic persona does not match with any of the archetypes mentioned above, please articulate your current persona below:

Answer:

Aligning Your Giving Portfolio with Your Philanthropic Vision

A. Your Philanthropic Vision

No matter where you are in your philanthropic journey, there is scope to broaden the vision and impact of your giving. Articulating the kind of change that you aspire to see in your philanthropic journey will help you move from inspiration to impact in your giving. Before mapping your current and future portfolio, it is important to set a north star to the evolution of your philanthropy, as you can only be the architect of change once you've understood exactly what sort of change you're looking for.

Once you know what drives your giving and what your vision is, it is essential to take stock of your current philanthropic portfolio. Identifying the causes and organizations you give to or support, the vehicles you leverage, and the depth of your involvement is the first step in broadening the scope of your philanthropy.

The following exercise will give you vital insights into the current state of your giving, while also prompting you to think about how you would like to see this portfolio evolve in the future so that it aligns with your vision.

1. What is your philanthropic vision?

Answer:

2. Please articulate how you wish to see your philanthropic legacy evolve:

Answer:

3. Do you have a theory of change for your philanthropic portfolio?

Theory of Change is a comprehensive illustration of how and why a desired change is expected to happen in a particular context. It is particularly focused on mapping out the connectors between what a program or change initiative does (its activities/interventions) and how these lead to desired goals being achieved.

- Yes
- No

4. If yes, please briefly outline the key components of your theory of change:

Answer:

B. Your Giving Causes and Vehicles

The causes or sectors that a philanthropist chooses to support from the building blocks of their giving portfolio.

1. Which causes do you currently support? How would you like to evolve these choices in the near future (next 3-5 years)?

(Highlight all that apply)

Indicative list of causes	Current portfolio of causes	Future portfolio of causes
Animal Rights		
Arts and Culture		
Age-specific causes (Children, Youth, Elderly)		
Disability and Special Needs		
Economy & Infrastructure		
Education		
Environment, Sustainability & Climate Change		
Food Security & Agriculture		
Gender-Related Causes		
Governance & Public Service Delivery		
Healthcare		
Legal/Judiciary Reform		
Poverty Alleviation		
Rural Development & Livelihood		
Science & Technology		



Give more
Give sooner
Give better

Skilling, Employment & Entrepreneurship		
Social Justice & Human Rights		
Sports		
Urban Development & Livelihood		
Water, Sanitation & Hygiene (WASH)		
Other: _____		

2. Which giving vehicles do you currently use? Which giving vehicles would you like to expand to in the near future (next 3-5 years)?

(Highlight all that apply)

Giving vehicles	Current portfolio	Future portfolio (3-5 years)
Direct Grant Making		
Grant Making Foundation		
Operating Foundation		
Collaboratives		
Collective Philanthropy		
Other Vehicles: _____ _____		

C. Your Quantum of Giving

1. Please mention the top 4-5 causes you support:

Cause/Sector	Organizations you support	Duration of support	Quantum	Anything that you would want to change in the future
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2. Do you have a philanthropic advisor (eg: wealth managers/ external consultants)? If so, could you please share their name, and what role do they play in your decision-making?

Answer:

3. How do you decide the quantum of your philanthropic giving?

(Highlight all relevant factors)

- Alignment with personal/family values
- Urgency of the cause
- Success and impact of previous initiatives you might have supported
- Recommendations from advisors
- Other: _____

4. Do you benchmark your giving? If yes, how do you currently benchmark your annual quantum of giving for philanthropy, and how would you like to benchmark it in the near future?

(Highlight all that apply)

Category	Current	Future (3-5 years)
As a % of total wealth and assets		
As a % of annual income/cash flow		
As a fixed annual budget		
As a portion of investment returns earmarked for		



philanthropy		
Any other benchmark: _____		

7. Out of your total philanthropic quantum, how do you allocate funds to different types of giving?

Type of Giving	Percentage Allocation (%)
Spontaneous philanthropy/need-based giving	
Systemic work (long-term initiatives)	
Programmatic initiatives	
Other (please specify)	

8. What has been the trend in your giving quantum over the last five years?

- Increasing
- Decreasing
- Remaining Constant

9. Do you set aside emergency funds for philanthropy outside of your regular giving? If yes, how do you determine the amount?

(Highlight all that apply)

- Fixed amount annually
- Based on previous years' unspent funds
- Other: _____

D. Monitoring Your Philanthropic Portfolio

1. Do you periodically review and update your philanthropic strategy? If yes, how do you measure the success of your philanthropic portfolio?

- Yes
- No
- Other: _____

(Highlight all that apply)

- Regular monitoring and evaluation
 - Independent third-party assessments
 - Feedback from beneficiaries
 - Case studies and success stories from the field
 - Other: _____
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2. Are you satisfied with the impact your philanthropic efforts have achieved so far?

- Yes
 - No
 - Partially satisfied
-

3. If no or partially satisfied, what areas do you believe require improvement?

(Highlight all that apply)

- Better alignment with objectives
- More measurable outcomes
- Increased engagement with beneficiaries
- Enhanced collaboration with other stakeholders
- Other: _____

E. Additional Reflections

If you would like to discuss your responses and explore ways to enhance the impact of your philanthropy or access a more detailed version of this workbook, please contact us at info@indianphilanthropy.org.

You can also consider revisiting this workbook periodically to track your progress and refine your goals. We look forward to collaborating with you to catalyze strategic philanthropy in India.



Give more
Give sooner
Give better

Please use the space below to capture any additional reflections or thoughts:

Answer:
