

Philanthropy for Inclusive Development

A Systems-thinking Approach
23rd -24th April 2024
Pune and Mumbai
Convening Report





We extend our heartfelt gratitude to all the individuals and organisations who participated in the events held at the Mahratta Chamber of Commerce, Industries and Agriculture in Pune and the Dasra office in Mumbai in April 2024.

We are also deeply grateful to Rati Forbes, philanthropist and Director of Forbes Marshall, and Luis Miranda, philanthropist and Chairman of Indian School of Public Policy (ISPP), for being the keynote speakers and sharing their insights and experiences with the attendees.

This report summarises the convenings organised by the Centre for Philanthropy for Inclusive Development (CPID), a Centre- of-Excellence (COE) at the Indian School of Development Management (ISDM) in April 2024. These events, held in two cities, were conducted in partnership with Dasra, Forbes Foundation, Social Venture Partners (SVP) India, and Desta LLP Research. We are thankful to our partners for their support and insights in organising these events.



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As part of its Philanthropy for Inclusive Development Initiative(1), ISDM Centre for Philanthropy for Inclusive Development (CPID) organised two convenings in Pune and Mumbai aimed at creating a platform for reflection and dialogue on incorporating systems thinking approaches for equitable and sustainable social impact.

These events, titled **Philanthropy for Inclusive Development: A Systems Thinking Approach**, were held in partnership with Dasra, Forbes Foundation, Social Ventures and Partners (Pune and Mumbai chapters), and Desta Research LLP. These took place on 23rd April 2024 in Pune and on 24th April 2024 in Mumbai as part of the Centre's multi-city initiative to provide a space for ecosystem enablers, funding organisations, philanthropists, SPOs, thought leaders, and others to learn together, challenge existing paradigms, and discuss collective actions to promote equality, justice, and a dignified life for all.

Both cities had a total of around 90 participants, and included a diverse mix of funders (philanthropists, CSR professionals) and leaders from Social Purpose Organisations (SPOs). The Centre had previously conducted similar events in Delhi in September 2023 and during the WINGS Forum conference in Nairobi in October 2023. As with those events, the convenings in Pune and Mumbai resulted in meaningful discussions on significant themes in philanthropy for inclusive development, such as long-term partnerships, flexible funding, community centricity, and inclusive internal organisational culture.

Some of the key themes explored in these convenings included:

- The need for philanthropic or funding approaches to have an inclusive development lens
- Challenges in implementing inclusive approaches internally, and in development interventions for long-term social impact
- Barriers for SPOs in securing funds for complex social issues
- Best practices to adopt, including community-centric approaches, flexible funding, and nurturing long-term partnerships

This document summarises the key learnings from these convenings, highlighting challenges as articulated by the participants based on their experiences, as well as some key actionable recommendations that emerged.







As philanthropists, we must invest in organisational development. Just as baking a delicious cake requires not only the ingredients but also external factors such as electricity and an oven, an NGO's success relies on more than just its resources. External aspects such as organisational development and capacity building are fundamental for an NGO to perform at its best.

Rati Forbes

There's one line which I remember from a book called Give Smart. It says that when you're looking to fly an airline, you don't pick the airline that has the lowest maintenance cost. Why do you pick an NGO that has the lowest maintenance cost?









BACKGROUND: Exploring the Indian Philanthropy landscape

In the dynamic interplay of, Samaaj, Sarkar, and Bazaar (as in the words of philanthropist Rohini Nilekani), philanthropy has traditionally acted as a critical force, bridging gaps left by both the state and market, while nurturing the growth of a vibrant civil society. Yet, data indicates that philanthropy can significantly amplify its impact by empowering marginalised communities and addressing multifaceted issues, thereby mitigating the widening inequality gap in our country.

India is currently experiencing a remarkable upswing in philanthropic endeavours, with Corporate Social Responsibility (CSR) expanding by 13%, a 12% growth rate in family philanthropy, and a 6% annual increase in retail giving from 2017 to 2022 (Bain & Co. and Dasra, 2023). However, the percentage of these funds being directed towards inclusive development needs a closer look.

CPID's research (2), based on a synthesis of secondary data and interviews with a spectrum of stakeholders within the philanthropic landscape—comprising private donors, CSR pioneers, social purpose organisations (SPOs), and philanthropy facilitators—and using system thinking tools(3), highlights several pivotal insights, briefly summarised below:



Indian givers can play a larger role in the social sector

Compared to their counterparts in high-income countries, the affluent in India give less to philanthropy. Private philanthropy has seen a 10% growth, reaching nearly INR 1.2 lakh crore, primarily driven by family philanthropy and retail donations. Corporate social responsibility and high-net-worth individual donations grew by 7%.(4) Indian givers can play a stronger role in complementing public sector.



Education and healthcare are top choices for CSR and individuals

There is less emphasis on areas such as human rights, gender equality, and on populations including at-risk youth, marginalised communities, such as Dalits, Tribals, and religious minorities, as well as vulnerable groups such as prisoners, sex workers, and immigrants.



CSR and philanthropic giving influence SPO focus

SPOs are concentrated in the education and health sectors. Tighter donor preferences limit the autonomy of SPOs, hindering their ability to innovate, adapt to local conditions, or address broader issues like gender and social justice.



SPOs frequently face resource shortages

Excessive monitoring and compliance burden, and lack of long-term flexible support, in turn, limits their agenda and scope of work. SPOs led by members of the Dalit, Bahujan and Adivasi communities face even more challenges(5).



Location biases are leaving some states behind

Certain geographic regions receive disproportionate funding and support, while others remain underfunded and frequently overlooked (like northeastern states, Bihar, Jammu & Kashmir). Most funds are allocated to states like Maharashtra, Gujarat, and Tamil Nadu, which are not the poorest states, nor the lowest on the Human Development Index (HDI).



Preferred states, preferred causes

Even in states like Maharashtra and Gujarat, which receive substantial funding, areas related to human rights and environmental causes get much lower funding compared to the funds allocated for education and healthcare (Candid, 2023).



Disparate intermediary support to social sector organisations

Intermediaries or philanthropy support organisations in India are predominantly concentrated in a select few regions, with Maharashtra, Uttar Pradesh, Tamil Nadu, and West Bengal notably present. In contrast, the northeastern states lag significantly in this regard.

Our research (6) on India's philanthropic ecosystem has highlighted barriers such as data scarcity, risk aversion, geographical and sector biases, power dynamics, and internal structures hindering impact. Using systems thinking tools, CPID has been examining these interactions, engaging stakeholders in discussions in convenings and delving into the complexities among philanthropy, SPOs, and communities towards developing an understanding of the ways in which different elements of the system interact with each other.

The insights gained from the convenings have played a pivotal role in contributing to the Philanthropy for Inclusive Development framework(7) spearheaded by CPID. This framework, co-created with funders, SPOs, philanthropy networks, advisories, and academic centres, hopes to serve as a practical guide for organisations to cultivate greater inclusivity within the philanthropic sector, potentially resulting in sustainable and inclusive development outcomes.

As part of this effort, CPID has developed a **self-assessment tool** along with research partners **Dasra**, **Forbes Foundation**, **CRY-Child Rights and You**, **Educate Girls**, and **CSR representatives**, for funding organisations that enables them to critically evaluate their practices and identify potential areas that require attention for achieving a more sustainable impact.

The Centre is also in the process of publishing a first-of-its-kind report on the state of philanthropic practices in India which includes insights on prevailing practices of 35+ philanthropic organisations in the country and also two detailed case studies on philanthropic organisations that are embracing some of the PID principles. (8)



Systems thinking is a management discipline and a way of understanding and analysing complex systems by examining the relationships between their various parts. This holistic approach focuses on the big picture, emphasising interconnectedness and the whole rather than just the individual parts. (DESTA, 2024)

A key aspect of systems thinking is recognising that changes in one part of a system can have cascading effects on other parts. Perfect parts don't always make a perfect whole; the unified whole is different from the sum of its parts. Thus, different parts of the system cannot be understood in isolation.

The need for systemic thinking arises from the reality of complexity, characterised by high uncertainty, disagreement on solutions, and unpredictability. Complexity is evident in social change efforts, including the context (historical, economic, political, sociocultural, ecological factors), the nature of interventions, stakeholder interactions, systemic change, and evaluation processes.

In philanthropy, the system has grown in capital, methods of giving, and types of interventions. Despite this, there is a gap between expected and actual impact. Reasons for this gap often involve different stakeholders blaming each other. For example, Special Purpose Organisations may blame the nature of funding, while philanthropies may blame the working methods of SPOs. Both might then see government policies as impediments. Additionally, community beliefs and cultural aspects can hinder programme effectiveness. This complex system often produces less than desired or counterintuitive outcomes, making it ripe for systems thinking to understand the issues and explore alternatives for creating desired change.

The systems convenings initiated by CPID has encouraged stakeholders to zoom out and examine their roles in perpetuating unintended problems through belief systems and institutional aspects. This has allowed for them to be able to locate their own belief systems and institutional aspects that are, in unintended ways, perpetuating the problems they are trying to solve.

In the two convenings in Pune and Mumbai, a mix of different tools and methods were used. The participants were shown causal loop diagrams that highlight the reasons for the prevalence of developmental challenges that the philanthropic system is trying to solve. Some philanthropic dilemmas were also highlighted and then the participants were asked to work upon those using the Iceberg model.



Systems thinking uses the iceberg model as an approach to dive deeper into underlying layers, which are causing symptoms of a problem. The model serves as a framework for understanding problems, guiding us to move from observing events to understanding patterns and behaviours of such events. It allows us to uncover the structures that are driving the patterns and events and to bring to surface the underlying mental models that are creating these structures.

The Iceberg Model was used as a tool to collect insights on the **behavioural aspects**, **institutional aspects** and **belief systems** that are driving the challenges and dilemmas in the philanthropy system in India. Participants were prompted to use the Iceberg Models to reflect, discuss and articulate their understanding of the System as-it-is.

Drawing from CPID's learnings, the following system traps were shared with the group to facilitate their reflective process:



Short-Term Outputs vs. Long-Term Outcomes

Overemphasis on short-term outputs and quick fixes rather than focusing on long-term outcomes and meaningful, lasting change.



Top-Down vs. Inclusive Decision-Making

Funders often use a top-down approach. How can they involve SPO partners and communities in decision-making to foster trust, transparency, and realistic expectations



Projectisation vs. Social Change

Focus on standardising approaches and compliance over fostering a just society. There is emphasis on project management and reporting instead of drivin emphasis on pr





Fragmented Initiatives vs. Collaborative Efforts

Prevailing individual initiatives over collaboration. How can philanthropy work with government and other funders to support complex, multi-year issues



Risk Aversion vs. Long-Term Change

Risk aversion towards long-term change. How can private philanthropy provide patient capital, support unconventional solutions, and nurture partnerships and knowledge sharing



Learning from Failures vs. Scaling Success

Focus on scaling success over learning from failures. Power asymmetry between donors and beneficiaries can lead to pressures on SPOs to conform to business-like practices.



SYSTEM AS-IT-IS

A summary of the behavioural and institutional aspects, and belief systems that we heard from participants that are reinforcing some of the recurring problems in the philanthropy ecosystem.

Behavioural Aspects

- Risk-aversion
- Exclusion of certain marginalised groups, causes and geographical areas

- Knowledge hoarding
- Fear of challenging the status-quo
- · Lack of collaboration between SPOs because they are afraid of losing funding, relevance & sustainability
- SPOs mask true operational costs to funders
- Education & Health funded easily due to visibility and awareness
- Vision and values misalignment between stakeholders
- One-size-fits all approach

- Funders focus on measurable outcomes and shortterm relief programs
 Funders don't spend time understanding social
- Funders and communities prefer quick results
- Prioritising outcome attribution to interventions
- Placing burden on marginalised communities to demonstrate development efforts
- Organisations prioritizing scale and efficiency over
- Organisations striving for uniqueness
- Utilization of data to confirm existing biases
- Funder's emphasis on branding & visibility
- Funders focus on problems that personally excite

Institutional Aspects

- Top-down approach in decision-making & funding
- Lack of community representation
- Equity-Efficiency conflict in decision-making
- Lack of funding for advocacy and activism
- Lack of diversity in governance and leadership
- Disconnect between regulatory frameworks and transformative
- Interpretation variations of CSR Laws
- CSR incentivisation of short-term funding
- 3-5 years considered "long-term" in policy terms Over-templatisation of work (For CSR, ESG etc.)

- Burdensome reporting imposed on SPOs
 Corporate boards prioritise tangible impact, requiring strong justifications for funding decisions
- Neglecting the importance of long-term impact assessment
- Organisations fear regulatory scrutiny
- Limited SPO collaboration
- Lack of collaboration incentives
- Competition for resources limiting SPO collaboration
- Limited spaces for knowledge exchange

- Lack of flexible funding hindering innovation
- Lack of innovative grant-making
- Underfunding of organisational development and admin costs
- Change of interests and strategies of donors
- Funders borrowing corporate models
- Funders pushing for SPO professionalisation
- Organisation's mission drift resulting from focus on
- Profits and factory set-up influences geographical
- Data-centric evaluation overlooking community
- overnment's reliance on outdated data
- Archaic Models of Monitoring and Evaluation (M&E)

Belief Systems

- Taking a deficit-based approach
- Diverse perceptions of long-term change
- Long-term goals are abstract and difficult to conceptualize
- Impact can always be quantified
- Structure is always a good thing
- Thinking "bigger is better"
- Risk is equated with failure

- Elitist perception of knowledge and solutions (People with money and power have all the answers)
- SPOs always value donor expertise
- Communities lack knowledge
- SPOs lack long-term strategic vision

Proclivity towards short term outputs instead of focusing on long term outcomes and change

Behavioural Aspect

Funding organisations often focus on measurable outputs and prioritise interventions that yield quick results. Interestingly, many a times, the communities tend to share similar motivations, preferring quick results.

"SPOs are seduced by big money from large philanthropists who apply principles of financial markets. Therefore, the expectation of quick turnover leads to focus on activities and outputs."

"Funding drives and limits scope of SPOs. The focus shifts to short-term measurable goals from the original vision of the founder."

Institutional Aspect

Regulatory frameworks often hinder transformative impact, fuelling a proclivity to short-term outputs in CSR. This disconnect arises from regulatory scrutiny, differing interpretations of CSR laws, meeting compliance requirements which often take the focus away from addressing long-term societal needs.

"Systemic change takes time but compliance requirements are not accommodating of this thought."

Additionally, discussions revealed that CSR's data-centric evaluation often overlooks community contexts, compounded by outdated data and SPO's archaic models of Monitoring and Evaluation (M&E), which fail to capture the nuanced needs and progress of these communities, burdening them to demonstrate the impact of development efforts undertaken by organisations.

Belief System

Stakeholders in the philanthropic ecosystem hold diverse views on long-term change. While long-term outcomes may seem abstract, there's a common belief that impact must be quantifiable and directly linked to interventions. Policies limiting change to 3-5 years often reinforce this view, inadequate for addressing complex issues.



2 Aversion to risk-taking is common across domestic private funders

Behavioural Aspect

Participants expressed that there is a general hesitation in challenging the status quo. Private domestic funding primarily favours organisations, themes, sectors, and individuals that funders already find familiar and comfortable. For example, sectors like education and healthcare secure funding with ease. This risk-averse behaviour leads to exclusion of certain marginalised groups, critical causes, and geographical areas.

Institutional Aspect

Funders prefer well-established, recognisable, and larger SPOs, often neglecting smaller or lesser-known entities that might be addressing significant but less visible issues. Business motivations and factory set-ups influence the funders" geographical choices. In most cases, it was also noted that funds are allocated according to the areas prioritised by the government. Non-conventional approaches are often ignored to avoid any discord with the existing system or any possible confrontation with the government.

Belief System

In the philanthropic space, risk is often equated with failure, stemming from the belief that mistakes are inherently wrong.



Lack of joint action and collaboration for solving complex issues

Behavioural Aspect

There is limited cross-sharing of knowledge, best practices, and lessons learned, especially from failures, among SPOs and funders. This, combined with the tendency for work to be overly driven by founders' personal passions and a lack of flexibility regarding vision and mission, often results in numerous individual, fragmented initiatives aimed at solving the same problem. These initiatives could be more effective if they were collaborative efforts. Examples of funders pooling resources to collectively address problems are scarce, as are examples of multiple SPOs collaborating and leveraging each other's expertise to provide holistic solutions for communities.

Institutional Aspect

There are limited spaces where SPOs and funders can openly express grievances and share insights among their peers. Fundraising also remains an issue for SPOs leading them to often compete with each other for limited resources. Lastly, there are scarce incentives for collaboration and also for funding work around developing thematic networks and ecosystems that promote more collaborative work across the sector.

Belief System

SPOs believe that collaboration among peers could lead to a loss of funding, relevance, and sustainability. Funders often believe that their solutions need to be unique, making it challenging to share decision-making power and align priorities in collaborative efforts



Lack of flexible funding hinders SPOs from achieving their full potential

Behavioural Aspect

Traditional funding mechanisms often overlook the importance of supporting organisational development. Funding organisations do not offer flexible funding options. It was discussed that funding organisations want guaranteed success and do not view failures as an opportunity to learn or innovate.

To secure funding, SPOs reported feeling compelled to mask their true operational costs, presenting a distorted view of their financial needs.

Institutional Aspect

This distorted view leads funders to largely cover only programmatic costs which ultimately jeopardises the SPO's ability to reach its full potential. SPOs often find themselves operating in survival mode. They end up having limited resources to prioritise strategic thinking, build capacity, hire skilled talent, innovate and focus on long-term planning. These challenges are also consistent with the ongoing pressure from funding organisations to monitor and show impact over shorter periods.

Belief System

Funders often perceive it as risky to allocate resources in advance due to prevailing trust deficit in the social sector. Funders often believe that carefully tracking outcomes is important to ensure money isn't wasted or can be used elsewhere.



Inherent funder-grantee power structures reinforce misalignment

Behavioural Aspect

Participants discussed how often there is a noticeable lack of alignment between the vision and values of funding organisations and SPOs. There is top-down decision-making rather than funding decisions and strategy being based on approaches that include the voice and experience of SPOs.

"People who have resources have a different lived reality than people on the ground. Funders have a perception of what is required which is often not the case"

Institutional Aspect

Participants noted that CSR funding often has a top-down approach in decision-making and funding. For instance, corporate boards with minimal community representation often dictate the course of CSR programs. This disconnect between funders and the communities result in interventions that do not fully address local needs. For example, funding for advocacy and activism is rare even though essential for solving some issues.

Funders' interests and strategies frequently change, leading them to prioritize different causes or models over time. This unpredictability often leads SPOs to adapt programs and fundraising efforts to align with donor preferences, further straining its resources and limiting its ability to innovate. SPOs frequently experience pressure from funders to adopt corporate models in their operations, prioritising efficiency and professionalisation.

Belief System

There is an elitist perception among some SPOs that funders with money and power have all the answers. In reality, funders have a skewed understanding of the sector and are themselves constrained by strict regulations. The elitist perception is reinforced by funders who assume that SPOs must value their expertise. They view SPOs and communities as dependent and vulnerable by adopting a provider's mindset and a deficit-based approach.



Preference of scale over effectiveness affects long-term outcomes

Behavioural Aspect

There is a growing trend of adopting scalable solutions, described as the 'success to the successful' trap[9] where models and solutions that show success quickly attract more resources as compared to solutions that might be more efficient but require a longer time frame to demonstrate success.

Institutional Aspect

Limited resources and a focus on measurable deliverables cause SPOs to prioritise short-term outputs over long-term impact. The early success of output-focused programs encourages a subsequent imitation of such programs, ultimately creating the 'success to the successful' trap. As a consequence, specific needs of the community may be ignored. The preference for rapid scaling often hinders the broader goal of inclusive development, as it encourages the imitation of successful models rather than fostering innovative solutions tailored to specific community needs" Funders at times appear to be driven by branding opportunities, shifting personal interests, and the allure of trending causes.

Funders at times appear to be driven by branding opportunities, shifting personal interests, and the allure of trending causes

"Solutions that indicate perceptions of the majority end up scaling"

Belief System

Funding organisations rapidly scale under the belief that their solutions have to be unique and that "bigger is better."





The vibrant and engaging discussions indicated that participants were able to reflect and locate their own roles and responsibilities within the ecosystem. While the convening provided a deeper and more nuanced understanding of the challenges that confront philanthropy, it also threw up questions and aspects that need further exploration.

The Road Ahead: Building an optimal philanthropic system together

The convenings mark a milestone in the Center's journey toward co-creating an inclusive philanthropy system. Key learnings include:

- Encouraging signs of change are visible, with philanthropies focusing on underserved areas and empowering marginalised communities, yet fragmented efforts persist.
- Many organisations already embrace inclusive and participatory philanthropic practices, but their best practices and stories need to be shared more widely.
- Collaborative efforts and a mindset shift across the ecosystem are needed for holistic inclusive development.
- Philanthropy support organisations, by collaborating more with each other, can play a crucial role in strengthening the movement for more inclusive philanthropy, thereby enabling systemic change.
- Practices supporting mutual trust, accountability, responsibility and transparency between funders and SPOs can lead to more sustainable impact on their communities.
- Funding organisations are bound by certain regulatory or other restrictions like alignment with business interests etc. while selecting themes, geographies or communities to work with but there is scope for adopting an inclusive development lens within their chosen areas.
- Continued dialogue and difficult conversations amongst stakeholders are crucial for understanding and addressing challenges. CPID will work towards organising more such convenings, discussions, and spaces to bring all stakeholders together to have similar honest and rich discussions.

We invite all philanthropic actors to join the discussion and become part of the movement for inclusive development in the country





- 1. Bringing together funders, SPOs, philanthropy networks, and academia through various collaborative approaches that include systems thinking convenings, **the Philanthropy for Inclusive Development (PID)** initiative aims to influence philanthropic practices in India and encourage funders to address root causes, provide long-term support to marginalised communities and underserved areas, and align with inclusivity principles in their practices.
- 2. ISDM(2023) Unleashing the Power of Philanthropy for Inclusive Development
- **3.** See pages 9-12
- 4.Bain & co. and Dasra (2024) India Philanthropy Report 2024
- **5.**The Bridgespan Group. (2021). <u>'Building strong, resilient NPOs in India: Time for new funding practices.'</u>
- 6. ISDM(2023)<u>Unleashing the Power of Philanthropy for Inclusive Development</u>
- **7.**CPID is co-creating a PID Framework with fellow stakeholders in the ecosystem as part of its Philanthropy for Development Initiative (PID). This framework will encompass guiding principles, actionable points, and practices that organisations can embrace to initiate their journey towards becoming more inclusive development-oriented in their funding approaches and programs.
- 8.To be tentatively launched in August 2024
- **9.**CPID's Landscape Report (Unleashing the Power of Philanthropy for Inclusive Development) stated that 'success to the successful' trap occurs when multiple entities vie for a limited pool of resources to address a problem. The entity with a proven track record or demonstrating success is more likely to attract additional resources, thus increasing the likelihood of continued success. The entity's initial achievement justifies the allocation of additional resources, but it can come at the expense of depriving other alternatives of resources and opportunities to build their own success, even if those alternatives are superior.



Participating Organisations

- AWWC
- Antulay Amin Foundation
- Apnalaya
- Apnishala Foundation
- Armman
- Ashraya Initiative
- ATCEF
- Baithak
- Bajaj Finance Limited
- Bridgespan
- Cummins
- deAsra Foundation
- Eaton
- Educate Girls
- Ekibeki
- EkSaath Foundation
- Farmers for forests
- iTeach Schools
- Lend a Hand
- Lighthouse communities
- MSDF
- Piramal Foundation
- Project Deep
- Rambha Charitable Trust
- RDA Holdings
- Red Dot Foundation
- Sahyog Foundation
- Shelter Associates
- Sneha Mumbai

- SSR
- Swades Foundation
- Social Ventures Partners India
- Tapasya
- Tata Trusts
- TBL Consultancy Services
- Teach for India
- TechMahindra Foundation
- TISS
- The Apprentice project
- Thermax
- Upadhyaya Foundation
- Veruschka Foundation
- WOTR
- Yojak
- Yuva





The Indian School of Development Management (ISDM) is a first-of-its-kind, internationally renowned, and autonomous institution established in 2016. ISDM's mission is to establish Development Management as a distinct discipline separate from business management or public administration. It aims to empower social purpose organisations to have a meaningful impact on a population scale by building a robust foundation of theory and practice in Development Management, transforming the way these organisations are led and managed.

Visit us at www.isdm.org.in



The Centre for Philanthropy for Inclusive Development (CPID) is a Centre of Excellence, under the aegis of the Global Knowledge Hub at ISDM. It is dedicated to catalysing philanthropy as a force for inclusive development through a combination of rigorous research, learning programs, knowledge exchanges and convening diverse voices.

Visit us at www.isdm.org.in/centers-and-projects/cpid.

