How to Build the Philanthropy Support Ecosystem (PSE)

Working it out Together: Engaging Philanthropy Actors in Mapping and Strengthening their own Ecosystem

SUPPORTED BY

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This document is part of the publication ‘Acting Together to Lift Up Philanthropy: WINGS guidance on How to Build a Supportive Ecosystem’
**Introduction to the process**

Part 5 of this toolkit offers a step-by-step guide on how to build the PSE.

This should be treated as an outline guide to be used creatively, depending on local context. The process will depend on the resources available, which include time as well as money. This should be seen as a creative and organic process of development, rather than a fixed and mechanical project. The guide gives an organisational framework, as compared to a blueprint.

The first question to arise is ‘who should start the process?’ There is no firm answer to this question, but the most obvious conclusion is that it should be people and organisations, who want to see more efficient and effective philanthropy. The examples of PSEs, given in Part 4 of this toolkit, show that there will be organisations that are already working on this. Harnessing these organisations and inviting them into a process designed to enhance their work is a good starting point. Interested organisations will likely include PSOs and both domestic and foreign funders, though this could also include government, universities, civil society organisations and private sector organisations. The precise arrangements will depend on the context, but whoever takes the lead should ensure that relevant people and organisations are included as part of the process.

The guide gives four stages:

**STAGES**

1. **Stage 1** is about getting going. It is a self-organising process, deciding who will be involved in a process that, in order to be successful, has to be inclusive of all main interests. The outcome of this stage is to form a steering committee.

2. **Stage 2** is about exploring the terrain. This involves getting to grips with data on the state of philanthropy support and talking to people in the know. The examples from India, Kenya and Russia indicate the kind of material that should be collected and that makes a good baseline for following up. Finally, this stage involves reviewing the guidance and planning how it can be applied locally.

3. **Stage 3** is about mapping the field – finding out which PSO is doing what, how they relate to one another, what in the field is working well and what could be improved. This stage involves building a collective vision of the potential of the PSE.

4. **Stage 4** is about developing a roadmap of what actions to take in order to realise the collective vision and beginning the task in earnest.
The four stages of mapping the philanthropy support ecosystem

1. **Select a team and set goals and intended outcomes**
   - Design workshops with core team and experts to establish objectives, outcomes and participants of the mapping.

2. **Adapt guidance to local context**
   - Desk research and participatory workshops with core team and experts to understand the current state of philanthropy, existing gaps and adaptations to mapping tools.

3. **Map the PSE**
   - Launch meeting to present the study to PSOs and PSE stakeholders and define a collective vision for philanthropy.

   - Co-creation workshop to share the live map with PSOs and PSE stakeholders to identify key actors and missing actors, strengths and gaps in the ecosystem.

4. **Develop next steps to strengthen PSE**
   - Co-creation workshop with PSOs emerging as key actors from the mapping process to identify priority action areas and define a collective vision and roadmap for a strong PSE.

Suggested participatory tools for mapping the PSE and defining a collective vision for philanthropy:

1. Participatory Social Network Analysis to generate a social network mapping
2. Co-creation workshops to assess the social network map and identify key actors and missing players
3. World Cafe format workshops to identify gaps and strengths
4. Scenarios and brainstorm workshops to identify potential solutions or roadblocks
STAGE 1: Select a team and set goals and intended outcomes

Objective

1. To define the objectives and desired outcomes of the mapping exercise
2. To define the roles of those leading and conducting the mapping exercise through each of the stages
3. To list the PSE stakeholders in the exercise, and set out the nature of their participation

Expected outputs

A document outlining objectives and overall outcomes, steering group roles and study participant numbers and roles

Key participants

Primary role:
Steering group

Support role:
1. Academic advisors
2. Other experts

Key questions to ask participants during this stage:

1. What is the composition of the team required to undertake this methodology at each stage?

Suggestions and Tips:
The process should use the principles of participatory research and the steering committee should include people with expertise in this area.

2. What outcomes should be achieved and what are the principles necessary to achieve them?

Suggestions and Tips:
Allow different outcomes to emerge from the mapping, since different PSE stakeholders have different needs.

Some outcomes might include:

- **For PSOs**: To identify their roles, demonstrate their value, map opportunities for collaboration, and increase engagement and support for the work.
- **For NGOs and operating foundations**: To understand the types of support available in order to maximise impact.
- **For international implementers and funders**: To stimulate the accumulation of local resources in the interests of long-term sustainability and strengthen geographic areas with weak support for philanthropy.
- **For researchers**: To better understand the philanthropy landscape and to identify levers to strengthen it.
3 Which PSE stakeholders must be involved to ensure that the exercise is both participatory and meets its objectives? What kind of participation is required from each stakeholder at each stage?

Suggestions and Tips:
Ideally, the PSE stakeholders who participate in the study should be:

- **PSOs:** across all 4Cs (capacity, capability, credibility, connection)
- **Funders:** of all types, individual, institutional, domestic and international.
- **Government:** policy makers and implementation agencies
- **Umbrella Civil Society Organisations:** that are able to contribute from a ‘beneficiary’ perspective.

Choose participants that are as representative of the geography, of the kinds of philanthropy and of the various beneficiaries as possible.

4 In what ways does the guidance need to be adapted to achieve the intended outcomes?

Suggestions and Tips:
Ensure that the steering group works with the different needs and interests of different stakeholders and that it aims to reconcile these needs and interests in the drafting of the objectives for the work.

Suggested steps, tools and methods to apply to answer questions:

**Step 1**
Conduct preliminary design workshops

**Step 2**
Call for inputs online and/or through workshops

**Step 3**
Conduct final design workshop

**Step 4**
Share document with WINGS

**Steps**

1. **Conduct preliminary design workshop(s) for the steering group to align internally and produce a ‘design document’ based on the results.**

2. **Call for inputs online and/or through workshops** from academic advisors and PSE experts on the mapping exercise design document. Prepared by the steering group in Step 1.

3. **Conduct final design workshop** for steering group to incorporate feedback provided in Step 2 and finalise the mapping exercise design document.

4. **Share document with WINGS at info@wingsweb.org** in order to address any queries, and to enable the ecosystem approach to supporting philanthropy to evolve globally.
STAGE 2: Adapt guidance to local context

Stage 2 adapts the guidance, including the taxonomy and metrics tool to the local context. This is important to ensure relevance of the process for key stakeholders.

<table>
<thead>
<tr>
<th>Objective</th>
<th>Adapt the guidance to the local context of philanthropy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expected outputs</td>
<td>A document that tailors the guidance to local circumstances</td>
</tr>
</tbody>
</table>
| Key participants                 | **Primary role:** PSE experts – people with long experience and good knowledge of the philanthropic support ecosystem. This might include:  
  • Heads of networks or platforms that convene stakeholders in philanthropy  
  • Researchers, academics on philanthropy: current head or director of research units and academic institutions on philanthropy  
  • PSE enablers (funders and PSOs): practitioners previously interviewed, or panellists at PSE forums, or member of global networks with good experience  
  **Facilitator role:** Steering group |

Key questions to ask participants during this stage:

1. **What is the level of maturity of the PSE in the region?**
   - **Suggestions and Tips:** Evaluate the performance of the PSE in the country, based on available data and use the WINGS 4Cs framework and the tool in Part 6 of this guidance to assess the added value of the work.

2. **What is the extent of data available and what are the gaps within the PSE?**
   - **Suggestions and Tips:** Bring the data together in one place and incorporate all sources, including expert views and knowledge.

3. **To what degree does the taxonomy fit the characteristics of the PSE?**
   - **Suggestions and Tips:** Stick to the guidance as much as possible, making adjustments to the taxonomy, based only on local context. This will help to develop a globally relevant and widely applicable methodology.
In what ways does the guidance need to be adapted to achieve intended outcomes?

Suggested steps, tools and methods:

Step 1: Conduct thorough literature review and data mining exercises

Step 2: Identify PSE experts

Step 3: Initiate participatory workshop(s)

Step 4: Share document with WINGS

Conduct a literature review and a data mining exercise to identify:
1. The nature of the PSE
2. The strength of existing data that can be mapped and what else might be necessary to complete the mapping exercise

Identify PSE experts with long experience and good knowledge of the philanthropic support ecosystem. This might include:
- Heads of networks or platforms that convene stakeholders in philanthropy
- Researchers, academics on philanthropy: current head or director of research units and academic institutions on philanthropy
- PSE enablers (funders and PSOs): practitioners previously interviewed, or panellists at PSE forums, or member of global networks with good experience

Initiate participatory workshop(s) with experts using methods such as:
1. Delphi method: This involves an iterative survey of experts. Each participant first completes a questionnaire and is then given feedback on the whole set of responses. Following this, experts are required to provide explanations for views that diverge significantly, from other participants. This process is repeated to achieve consensus.
2. Scenarios workshops: These develop outline descriptions of potential future challenges and gaps encountered, while carrying out the mapping exercise. This can help compensate for data scarcity in the planning stage
3. The World Café: This creates a café ambience, in which participants discuss a question or issue in small groups around tables. At regular intervals, the participants move to a new table. One table host remains and summarises the previous conversation for the new table guests. Thus, second and successive conversations are informed by ideas generated by earlier participants.

Revise and share the new guidance with WINGS at info@wingsweb.org in order to allow the taxonomy to evolve as a living document. Share both the changes and the reason for them to enable WINGS to revise the guidance to make it more sensitive to local variations.
STAGE 3: Map the PSE

Step 3 develops a map of the PSE, showing the key relationships, and assessing its strengths and weaknesses. It will identify gaps in provision, roadblocks to development and will generate insights about how challenges could be met.

**Objective**

To undertake the mapping of the PSOs and other PSE stakeholders in a country, identifying strengths and weaknesses

**Expected outputs**

Publicly available mapping of the PSE of a country

**Key participants**

Primary role: PSOs and PSE Stakeholders

Facilitator role: Steering group

Ensure that the most dominant PSOs and PSE stakeholders are included, along with a sample of representative others. Ensure that no centrally important actors are excluded.

**Key questions to ask participants during this stage:**

1. **What is the current state of the PSE?**

   *Suggestions and Tips:*
   
   Break this question into sub-questions:
   
   a. How would we describe philanthropy in the country?
   b. What are the gaps in philanthropy?
   c. How can we fill those gaps?

2. **What are the various entity types through which PSOs operate?**

   *Suggestions and Tips:*
   
   Check the entity type from the categories, as listed in the adapted taxonomy.

3. **Which PSE stakeholders do these PSOs serve?**

   *Suggestions and Tips:*
   
   Ideally, PSE stakeholders could include:
   
   • **Funders:** high net-worth individuals, corporate donors, family foundations, community philanthropy organisations, international funders/corporate agencies, NGOs (international and domestic)
4 Which PSE stakeholders do these PSOs engage with?

*Suggestions and Tips:*
Ideally, PSE stakeholders could include:
- Funders
- Government: policy makers and implementation agencies
- Civil society/umbrella NGOs that could contribute in building a picture from a ‘beneficiary’ perspective.

5 What are the other PSOs that support organisations could collaborate with and what is the nature and frequency of collaboration?

*Suggestions and Tips:*
Check the PSO types from the adapted taxonomy.

6 What functions do PSOs perform? Which are the dominant (top 5-10) ones?

*Suggestions and Tips:*
Check the functions from those listed in the adapted taxonomy.

7 How important and frequent are these functions to PSE stakeholders?

*Suggestions and Tips:*
For rating the importance of PSO functions, the following classification is suggested. Clients are asked which of the following categories best fits their view:
- Functions that are central to your success so far,
- Functions that are important but not central,
- Functions that are fairly useful, or
- Functions that are not useful/not relevant.

For rating the frequency of engaging PSO functions, the following scales are suggested. Clients are asked which of the following categories best fit their view:
- Engaged at least once a month,
- Engaged once a quarter,
- Engaged once a year,
- Not engaged.

The respondents are to examine the list of functions attached in the Annexure and rank them, based on the suggested scales

8 What values or types of assets do PSOs create for PSE stakeholders?

9 What is the geographical distribution of the network of PSOs? Are areas outside the capital and large cities well-served?

10 How does the current ecosystem serve different forms of philanthropy?
Suggested steps, tools and methods to apply to answer questions:

**Step 1**
Online or in-person launch meeting to start mapping and define a vision for philanthropy

- Present the mapping initiative.
- Introduce and engage participating stakeholders and incorporate any feedback.
- Define a collective vision for philanthropy.

**Step 2**
Build a questionnaire

**Step 3**
Implement the questionnaires through a mix of online and offline methods

**Step 4**
Feed data into a social network analysis software

**Step 5**
Co-creation workshop to share the live map with key players

**Step 6**
Update the live map

**Step 7**
Analyse additional data collected in the questionnaire

**Step 8**
Publish the document and share it with WINGS

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**Online or in-person launch meeting** to

- Present the mapping initiative.
- Introduce and engage participating stakeholders and incorporate any feedback.
- Define a collective vision for philanthropy.

**Build a questionnaire** to answer the following questions:

1. What are the various PSO entity types in the ecosystem?
2. Which philanthropic actors do these PSOs serve?
3. What are the other PSOs that support organisations collaborate with? What is the nature and frequency of collaboration?
4. What functions do PSOs perform for the philanthropic actors and PSE stakeholders? Which are the top 3 functions?
5. How important and frequent are these functions to PSE stakeholders? These questions can be answered using the rating scale.
6. What is the added value to PSOs for their stakeholders? (Open-ended question).
7. What is the distribution network of PSOs and are all areas of the country served?
8. Does the PSE serve all forms of philanthropy?
Implement the questionnaires through a mix of online and offline methods across all PSE stakeholder types (PSOs, funders, government, and implementers):

1. **Offline**: Administer the questionnaire at multi-stakeholder workshops, while noting responses by a show of hands or filling out the questionnaire. Responses are then manually fed into the analysis software.

2. **Online**: Circulate the questionnaire online to all PSE stakeholders using a Google Sheet, or a similar live document connected to analysis software.

3. **Mixed Method**: Administer the questionnaire in person, across stakeholder types at a conference or workshop and collect the data on a Google Sheet, or similar live document connected to analysis software.

Mixing online and offline approaches is recommended, in order to capitalise on the benefits of both means of data collection.

Offline data collection allows for more dialogue and greater clarity in terms of selection.

Online data collection allows for greater anonymity, self-identification and can be scaled across a larger audience.

Feed data into a social network analysis (SNA) software such as kumu.io or NVIVO 12 to generate a social network mapping and understand the critical nodes within the PSE. It is recommended that two types of SNA maps are generated from the data collected:

1. Map of the functions provided and used in the ecosystem
2. Map of the key organisations in the ecosystem and their nature and frequency of engagement

Ideally, plan to update the data collection and mapping at a regular frequency.

A note on Social Network Analysis written by Barry Knight is provided in the Annexure.

Conduct a co-creation workshop to share the live map with key players, identifying them and gaps in the philanthropy support ecosystem:
1. Present the landscape of PSOs and other key stakeholder in the PSE.
2. Identify key connectors and enablers within the ecosystem.
3. Understand their role and degree of influence on the other players in the ecosystem.
4. Identify existing links and collaboration between PSOs in the ecosystem.
5. Identify existing links and collaboration between PSOs in the ecosystem.

Update the live map based on learnings from the workshop.

Analyze additional data collected in the questionnaire, in order to identify trends and relations within the PSE.

Publish the document and share it with WINGS at info@wingsweb.org and with the ecosystem in general.
STAGE 4: Next steps to strengthen the PSE

Once the mapping has been made publicly available, use stage 4 to bring ecosystem stakeholders together and build a collective view on how the PSE should develop.

<table>
<thead>
<tr>
<th>Objective</th>
<th>Engaging key ecosystem players, as identified through the mapping exercise, to build a collective view on how the PSE should develop.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expected outputs</td>
<td>Draft a roadmap for collective action, collaboration and initiatives to meet the gaps in the ecosystem, informed by the results of the PSE mapping exercise.</td>
</tr>
</tbody>
</table>
| Key participants | Primary role: PSOs and PSE Stakeholders  
Facilitator role: Steering group/PSO lead. |

Key questions to ask participants during this stage:

1. **How has the understanding of the current and desired state of philanthropy in the region evolved based on the learnings from the mapping exercise?**

   *Suggestions and Tips:*
   - Present the findings from the mapping exercise and the vision for philanthropy as defined in the previous state to invite inputs from new players that have been added to the room.

2. **What are some of the potential ways in which these gaps can be addressed by the key actors in the PSE?**

3. **What are some of the models that can be adopted to address these gaps?**

4. **What are the time, resource and knowledge commitments undertaken by stakeholders to address these gaps?**

5. **How can the stakeholder engagement be sustained to assess the impact of interventions and to continue progress?**
Suggested steps, tools and methods to apply to answer questions:

**Step 1**
Conduct a co-creation workshop with key players

**Step 2**
Define the collective vision and roadmap to implementation

**Step 3**
Share document with WINGS

**Step 4**
Hold regular meetings with stakeholders to continue and track progress

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**Conduct a co-creation workshop with key players** identified in step 1 to identify potential interventions to strengthen the PSE. The following tools can be used in the course of this workshop:

1. **Open space to set agenda:** This allows attendees to help develop the agenda for a given session (or a whole workshop) rather than being given an already developed agenda by the workshop/conference organisers.
2. **Brainstorm session to develop solution:** A brainstorming session is a tool for generating as many ideas or solutions as possible to a problem or issue. It is not a tool for determining the best solution to a problem or issue, but it can effectively engage audiences.

**Define the collective vision and roadmap to implementation**

1. Map the assets in the room.
2. Articulate engagement opportunities and potential intervention models and strategic partnerships.
3. List the commitments of all participants and develop implementation timeframes.
4. Identify tracking and evaluation techniques that have the buy-in of all stakeholders in the room.
5. Establish monitoring mechanisms to ensure that progress is continued and the collective effort remains active and effective.
6. Scenarios workshops can be used to identify potential roadblocks in intervention: a Scenario workshop will involve narrative descriptions of potential future challenges and gaps encountered while carrying out the interventions. This can help account for regional variations and data scarcity in the planning stages. This can be particularly useful in identifying key interventions and potential challenges in implementation.

**Publish country PSE development vision document and share it with WINGS at info@wingsweb.org** and the ecosystem at large.

**Hold regular meetings to keep the community of stakeholders alive** and to track progress as per agreed measures.
How to apply and strengthen the tool

Field experts, practitioners and researchers consulted highlighted the following areas to consider in strengthening the methodology in future:

1. **Value the process**

   What keeps the methodology relevant is the fact that it initiates dialogue, which in itself is an outcome worth achieving.

   “The process has a value in itself, in simply convening people, who might not have ever been convened before or have not been able to step out of their own organisation demands.”

   - Ingrid Srinath, Centre for Social Impact and Philanthropy, Ashoka University

2. **Create appropriate engagements with participants**

   The participatory approach to ecosystem mapping, envisioning the future of the ecosystem means that players are aligned and equipped to fill ecosystem gaps through concerted efforts.

   “Key interlocutors are important, so if we start looking at the country that will be selected, we can have interviews with these interlocutors and develop a first form of mapping of the philanthropic ecosystem in the country identifying the key sectors and the key players.”

   - Jean-Marc Fontan, Université du Québec à Montréal

The mapping methodology in itself is a call for the ecosystem to come together and chart the way forward. The methodology calls for volunteers willing to undertake this exercise. Users are strongly encouraged to share their feedback and recommendations on the exercise to strengthen its efficacy and relevance across local contexts. Please share feedback via email to info@wingsweb.org.

**Keeping in touch with WINGS**

The process of mapping involves a call for the ecosystem to come together and chart the way forward. It involves volunteers stepping forward to undertake this exercise. Once underway, the steering committee is strongly encouraged to share feedback and recommendations to strengthen the efficacy and relevance of the exercise, across differing local contexts. Please share feedback via email to info@wingsweb.org.
Annexure
Social Network Analysis (SNA) is the process of investigating social structures through the use of networks and graph theory. It characterises networked structures in terms of nodes (individual actors, people, or things within the network) and the ties, edges, or links (relationships or interactions) that connect them.

Examples of social structures commonly visualised through social network analysis include social media networks, memes spread, information circulation, friendship and acquaintance networks, business networks, knowledge networks, difficult working relationships, social networks, collaboration graphs, kinship, disease transmission, and sexual relationships.

These networks are often visualised through sociograms, in which nodes are represented as points and ties are represented as lines. These visualisations provide a means of qualitatively assessing networks by varying the visual representation of their nodes and edges to reflect attributes of interest.

Social network analysis has emerged as a key technique in modern sociology. It has also gained a significant following in anthropology, biology, demography, communication studies, economics, geography, history, information science, organisational studies, political science, public health, social psychology, development studies, sociolinguistics, and computer science and is now commonly available as a consumer tool.

Visual representation of social networks is important to understand network data and convey the results of the analyses. Numerous methods of visualisation for data produced by social network analysis have been presented. Much of the analytic software has modules for network visualisation. Exploration of data is done through displaying nodes and ties in various layouts, and attributing colours, size and other advanced properties to nodes. Visual representations of networks may be a powerful method for conveying complex information, but care should be taken in the interpretation of node and graph properties from visual displays alone, as they may misrepresent structural properties, better captured through quantitative analyses.

Signed graphs can be used to illustrate the good and bad relationships between humans. A positive edge between two nodes denotes a positive relationship (friendship, alliance, dating) and a negative edge between two nodes denotes a negative relationship (hatred, anger). Signed social network graphs can be used to predict the future evolution of the graph. In signed social networks, there is the concept of ‘balanced’ and ‘unbalanced’ cycles. A balanced cycle is defined as a cycle where the products of all the signs are positive. According to balance theory, balanced graphs represent a group of people, who are unlikely to change their opinions of the other people in the group. Unbalanced graphs represent a group of people, who are very likely to change their opinions of the people in their group. For example, a group of 3 people (A, B, and C) where A and B have a positive relationship, B and C have a positive relationship, but C and A have a negative relationship is an unbalanced cycle. This group is very likely to morph into a balanced cycle, such as one where only has a good relationship with A and both A and B have a negative relationship with C. By using the concept of balanced and unbalanced cycles, the evolution of signed social network graphs can be predicted.

When using social network analysis as a tool for facilitating change, different approaches of participatory network mapping have proven useful. Here, participants provide network data, by actually mapping out the network (with pen and paper or digitally) during the data collection session. An example of a pen-and-paper network mapping approach, which also includes the collection of some actor attributes (perceived influence and goals of actors), is the net-map toolbox. One benefit of this approach is that it allows researchers to collect qualitative data and ask clarifying questions, while the network data is collected.
About WINGS

WINGS is a network of 180+ philanthropy associations, networks, academic institutions, support organisations, and funders, in 58 countries around the world whose purpose is to strengthen, promote and provide leadership on the development of philanthropy and social investment in order to promote and develop philanthropy and contribute to a more effective and diverse civil society.

Visit us at www.wingsweb.org
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About Sattva

Sattva is a social impact strategy consulting and implementation firm. Sattva works closely at the intersection of business and impact, with multiple stakeholders including non-profits, social enterprises, corporations and the social investing ecosystem.

Sattva works on the ground in India, Africa and South Asia and engages with leading organisations across the globe through services in strategic advisory, realising operational outcomes, CSR, knowledge, assessments, and co-creation of sustainable models. Sattva works to realise inclusive development goals across themes in emerging markets including education, skill development and livelihoods, healthcare and sanitation, digital and financial inclusion, energy access and environment, among others. Sattva has offices in Bangalore, Mumbai and Delhi.

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