

PAY-WHAT-IT-TAKES INDIA INITIATIVE

Data pack | Survey of nonprofits 2020 and 2025

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Pay-What-It-Takes (PWIT) India is a multiyear, collaborative initiative aimed at building a stronger and more resilient social sector in India

- Funders and their nonprofit partners share a commitment to making progress on some of society's most pressing problems.
 - Yet, **chronic underfunding of nonprofits' true costs** – core costs, organisational development (OD) costs, building of reserves or corpus, and programmatic costs – **blunts the impact for which funders and nonprofits strive.**
- The PWIT India Initiative's goal is to inform and influence the mindsets and practices of funders, nonprofits, and intermediaries to **advance five principles that can unlock the impact potential of nonprofits** and hence advance social outcomes in India.



Develop multiyear funder-nonprofit partnerships

Partner for the long term and build mutual trust with nonprofits.



Pay a fair share of core costs

Cover nonprofits' expenses for day-to-day operations.



Invest in organisational development

Support nonprofits' growth in key areas.



Build financial resilience

Contribute to reserves or corpus, that provide a safety net for nonprofits.



Embed diversity, equity, and inclusion in grantmaking

Recognise and address the needs of underserved individuals and communities.



To support the initiative, The Bridgespan Group conducted surveys of nonprofit leaders in 2020 and again in 2025.

The surveys aimed to understand the adoption and evolution of true-cost funding practices in the sector as well as to surface the challenges nonprofits face in meeting their true-cost needs.

Pay-What-It-Takes Terminology

- **True costs:** The total of four categories of expenses incurred by a nonprofit: core (indirect or nonprogramme) costs, organisational development (OD) costs, reserve or corpus funding, and programme (direct) costs.
- **Programme (direct) costs:** Expenses incurred to implement a specific project.
- **Core (indirect or nonprogramme) costs:** Shared administrative or support-function expenses not tied to a specific project or programme, such as salaries of nonprogramme employees in human resources, finance and accounting, fundraising, and communications; rent and utilities for a central office; and central technology costs.
- **Organisational development:** Investments that strengthen an organisation's capacity and long-term effectiveness, such as strategic planning, leadership and talent development, monitoring and evaluation, fundraising capability, information technology, and financial resilience. One-time organisational development expenses, such as for technology upgrades, may evolve into ongoing core costs after the initial investment.
- **Corpus funds:** Represents the permanent funds maintained by an organisation to be used in exceptional circumstances when survival and maintenance of the organisation is at threat.
- **Reserves:** This is the accumulation of funds for a future purpose. Under Section 11 of the Indian Income Tax Act, 1961, nonprofits can build their reserves through accumulation of up to 15 percent (apart from that nonprofits may carry forward program funding for a multiyear project). Under Section 11(2) of the same Act, a nonprofit can accumulate more than 15 percent, but it needs to be spent within next five years.
- **Financial resilience:** Long-term financial stability cultivated through prudent financial planning, diversification of the funder base, monitoring of financial performance, and building of reserve or corpus funds.

Methodology summary: 2020 and 2025 Pay-What-It-Takes (PWIT) India Initiative nonprofit surveys

		2020 nonprofit survey	2025 nonprofit survey
Objective		<ul style="list-style-type: none"> Understand the financial health and funding challenges faced by Indian nonprofits in securing true-cost funding. 	<ul style="list-style-type: none"> To assess how nonprofit experiences and perceptions of true-cost funding have evolved since 2020.
Methodology	Timing	<ul style="list-style-type: none"> Data collection and analysis conducted from September – November 2020. 	<ul style="list-style-type: none"> Data collection and analysis conducted from June – August 2025.
	Respondents	<ul style="list-style-type: none"> 388 nonprofit leaders, including 22 responses in Hindi. 	<ul style="list-style-type: none"> 460 nonprofit leaders, including 14 responses in Hindi and 2 responses in Marathi.
	Representation	<ul style="list-style-type: none"> Covered a diverse mix of organisations varying in terms of size (annual expenditure), communities they serve, and geographic locations. 	
Bias mitigating measures undertaken		<ul style="list-style-type: none"> Multi-channel outreach in two languages (English and Hindi). External expert and intermediary feedback used to validate insights. 	<ul style="list-style-type: none"> Multi-channel outreach in three languages (English, Hindi, Marathi). Separate analysis of responses by source channel to check for bias. Funders, nonprofits, and intermediaries reviewed early findings to reduce confirmation bias.
Limitations		<ul style="list-style-type: none"> All survey inputs are self-reported and not independently validated or audited. Despite mitigation, selection and self-reporting biases remain possible. Survey conducted as part of a broader study that also included financial analysis; results reflect perceptions at that time. 	<ul style="list-style-type: none"> All survey inputs are self-reported and not independently validated or audited. Despite mitigation, selection and self-reporting biases remain possible.

How to interpret the PWIT India survey data

To ensure accurate representation of the PWIT India survey data, please keep the following guidance in mind.

- **Interpreting aggregate results:**

- View results as directional, not definitive. The data reflects perceptions and self-reported practices of nonprofit leaders at the time of each survey.
- Percentages are indicative of sentiment, not audited counts or verified outcomes. Small shifts between years should not be interpreted as statistically significant.
- Cross-question analysis (e.g. comparing funding challenges vs. organisational size) can reveal useful patterns, but results should be treated as illustrative, not predictive.

- **Data limitations and use boundaries:**

- The surveys were not designed to produce nationally representative estimates of India's nonprofit sector.
- All inputs are self-reported and unaudited; financial or operational data were not independently verified.
- Results should not be used for benchmarking or compliance purposes – they are intended for sector learning, reflection, and discussion.

- **Citation:**

- When using visuals or summaries from this data pack, please include a source note attributing the data to:
 - > *Pay-What-It-Takes India Initiative Survey of Nonprofits 2020 conducted by The Bridgespan Group.*
 - > *Pay-What-It-Takes India Initiative Survey of Nonprofits 2025 conducted by The Bridgespan Group.*

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2020 nonprofit survey data

The 2025 nonprofit survey received 460 responses from a diverse set of nonprofits from across the country

Key segmentation variables:

	Organisation size (annual budget, Rs)	No. of responses	%
Small	Less than 15 lakhs	42	9%
	15 lakhs to 99 lakhs	158	34%
Medium	1 crore to 4.99 crores	157	34%
	5 crores to 9.99 crores	30	7%
Large	10 crores to 24.99 crores	40	9%
	25 crores to 49.99 crores	18	4%
	50 crores or more	15	3%

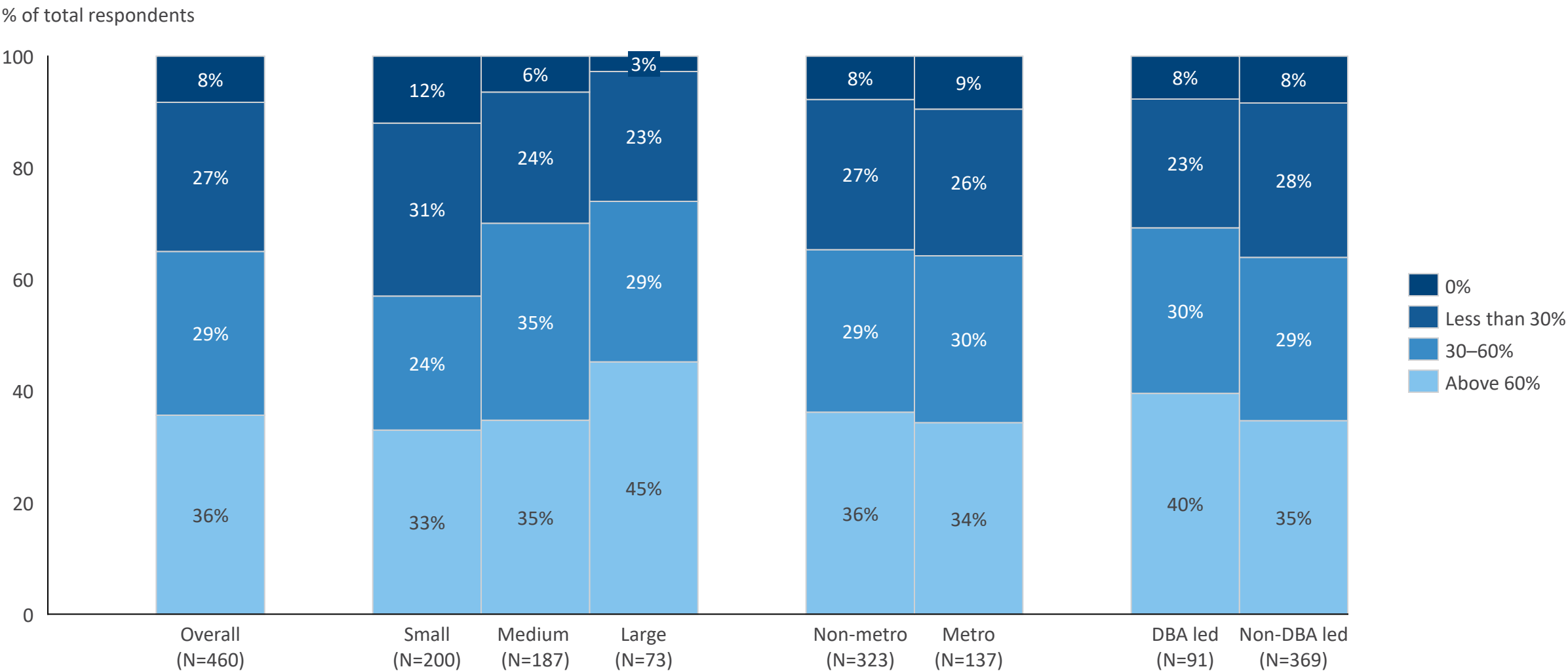
Geographic location of headquarter	No. of responses	%
Metro*	137	30%
Non-metro	323	70%

Leadership composition^	No. of responses	%
Women	211	46%
Dalit, Bahujan, Adivasi (DBA) communities	91	20%
Religious minorities	59	13%
Persons with disabilities	44	10%
Rather not say/ Don't know	18	4%
LGBTQI+	6	1%
None of these	159	35%

Note: Analysis conducted on the following slides is across three parameters (i) organisation size – categorized as small, medium, or large based on annual budget (ii) headquarters location – whether the organisation is metro-based or non-metro-based, and (iii) leadership composition – whether the organisation is DBA-led or non-DBA-led

Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2025

Q1: Approximately what percentage of your total funding portfolio comprises multiyear partnerships with funders?



Note: Any discrepancies in percentage totals are due to rounding. **Metro organisations** are those with headquarters in Ahmedabad, Bangalore, Chennai, Delhi NCR, Hyderabad, Kolkata, Mumbai, and Pune. **Small organisations** are those with annual budgets less than Rs 1 crore, **medium-scale organisations** are those with annual budgets between Rs 1 to 10 crore, and **large organisations** are those with annual budgets over Rs 10 crore. **DBA-led organisations** include those whose leaders belong to the Dalit, Bahujan or Adivasi communities.

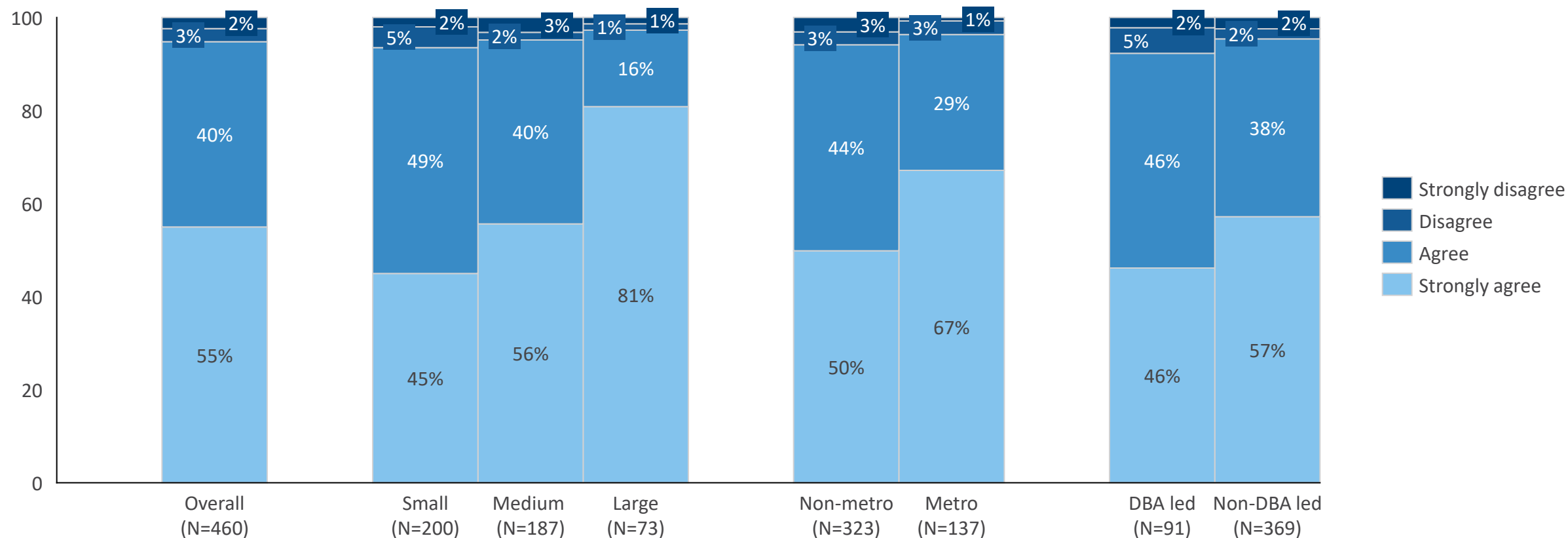
Source: Pay-What-It-Takes India Initiative Survey of Nonprofits 2025 conducted by The Bridgespan Group.

Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2025

Q2: Please share the extent to which you agree or disagree with the following statements based on your organisation's experience in the past three years (since 2022).

(A) We actively seek multiyear partnerships with current or potential funders.

% of total respondents



Note: Any discrepancies in percentage totals are due to rounding. **Metro organisations** are those with headquarters in Ahmedabad, Bangalore, Chennai, Delhi NCR, Hyderabad, Kolkata, Mumbai, and Pune. **Small organisations** are those with annual budgets less than Rs 1 crore, **medium-scale organisations** are those with annual budgets between Rs 1 to 10 crore and **large organisations** are those with annual budgets over Rs 10 crore. **DBA-led organisations** include those whose leaders belong to the Dalit, Bahujan or Adivasi communities.

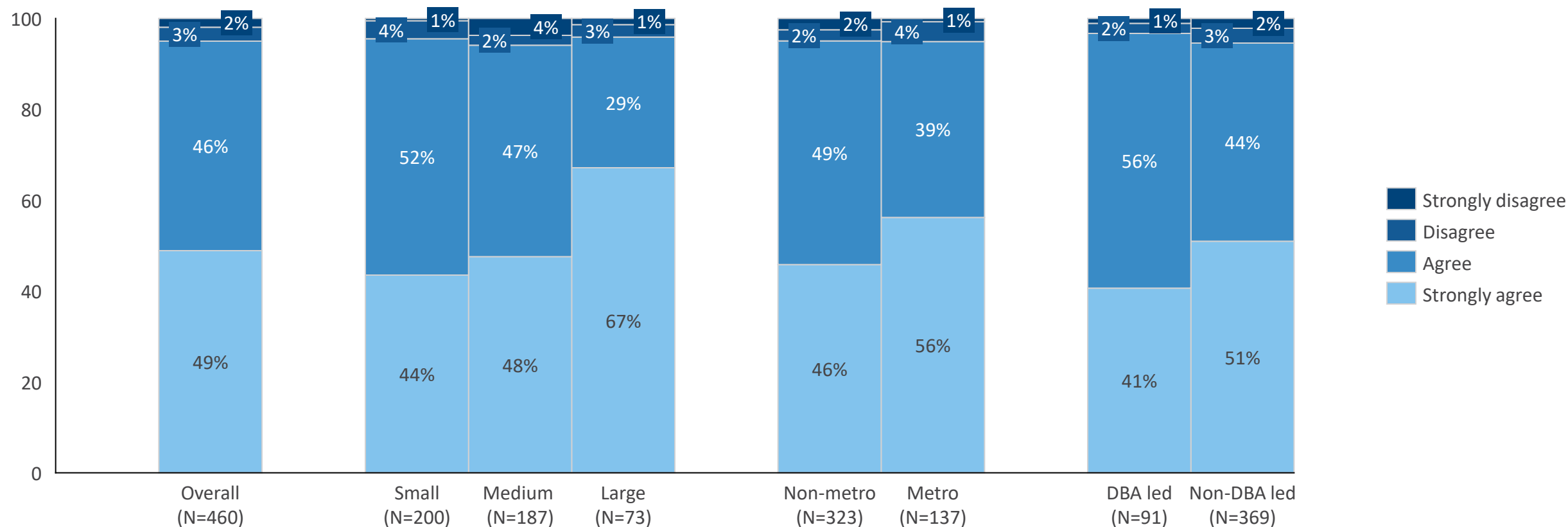
Source: Pay-What-It-Takes India Initiative Survey of Nonprofits 2025 conducted by The Bridgespan Group.

Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2025

Q2: Please share the extent to which you agree or disagree with the following statements based on your organisation's experience in the past three years (since 2022).

(B) Our proposals demonstrate how we can deliver better outcomes through multiyear partnerships.

% of total respondents



Note: Any discrepancies in percentage totals are due to rounding. **Metro organisations** are those with headquarters in Ahmedabad, Bangalore, Chennai, Delhi NCR, Hyderabad, Kolkata, Mumbai, and Pune. **Small organisations** are those with annual budgets less than Rs 1 crore, **medium-scale organisations** are those with annual budgets between Rs 1 to 10 crore and **large organisations** are those with annual budgets over Rs 10 crore. **DBA-led organisations** include those whose leaders belong to the Dalit, Bahujan or Adivasi communities.

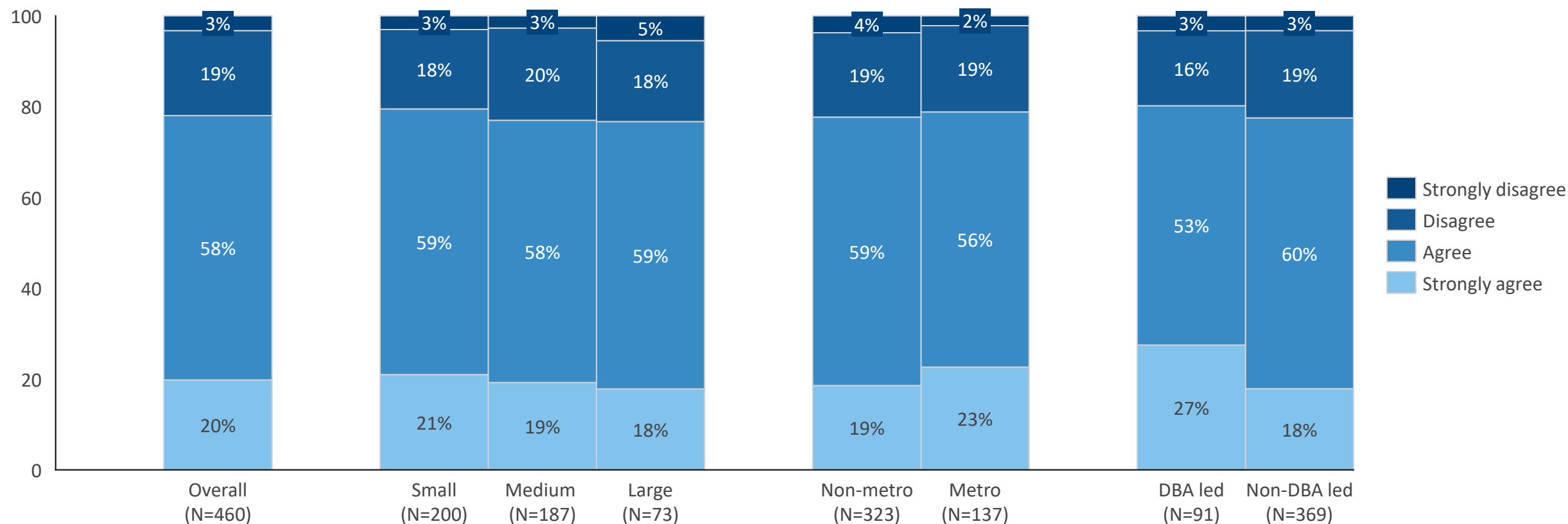
Source: Pay-What-It-Takes India Initiative Survey of Nonprofits 2025 conducted by The Bridgespan Group.

Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2025

Q2: Please share the extent to which you agree or disagree with the following statements based on your organisation's experience in the past three years (since 2022).

(C) Most funders prefer funding short-term projects as compared to long-term programmes.

% of total respondents



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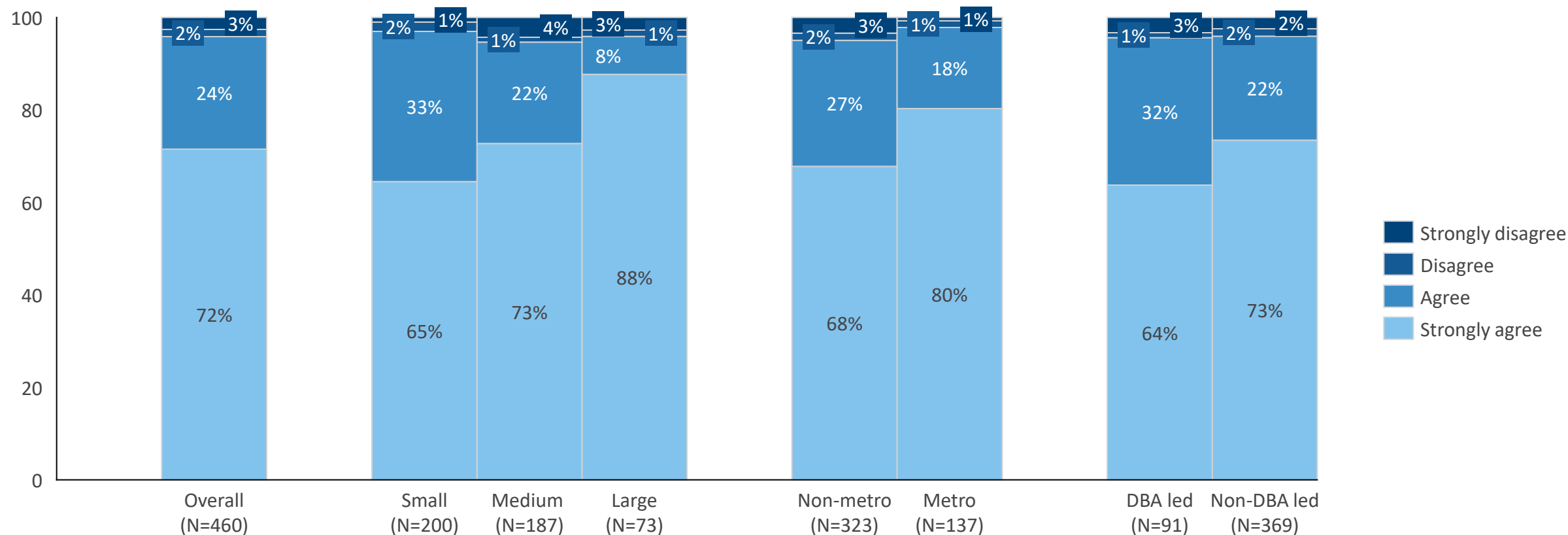
Source: Pay-What-It-Takes India Initiative Survey of Nonprofits 2025 conducted by The Bridgespan Group.

Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2025

Q2: Please share the extent to which you agree or disagree with the following statements based on your organisation's experience in the past three years (since 2022).

(D) We can design better programmes when we have a long-term funding commitment.

% of total respondents



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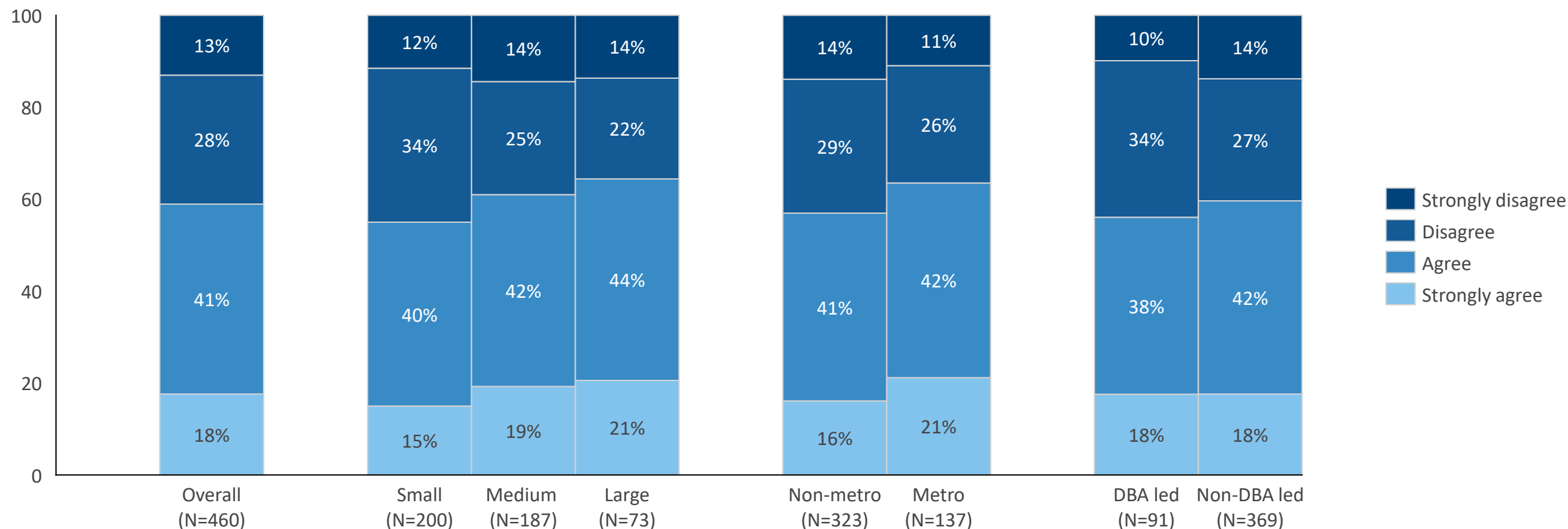
Source: Pay-What-It-Takes India Initiative Survey of Nonprofits 2025 conducted by The Bridgespan Group.

Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2025

Q2: Please share the extent to which you agree or disagree with the following statements based on your organisation's experience in the past three years (since 2022).

(E) We have had to pause or stop programmes in the absence of funding.

% of total respondents



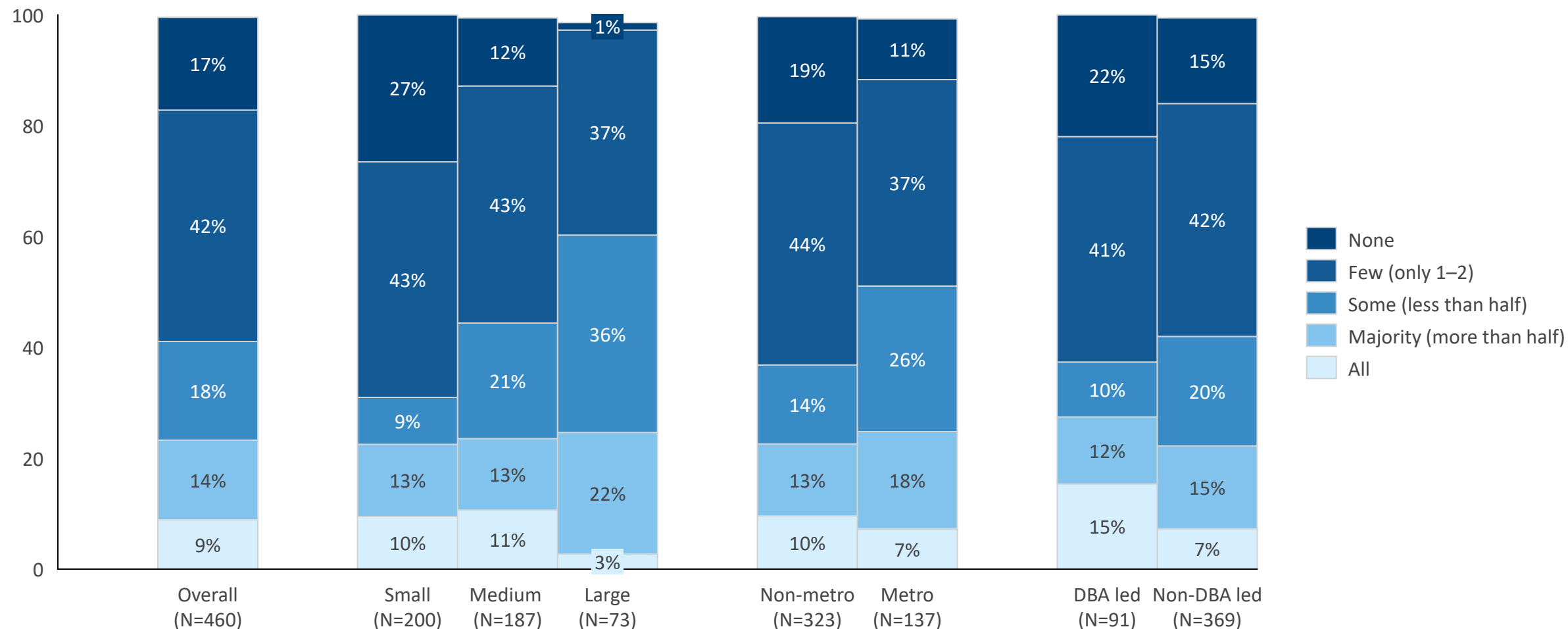
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Source: Pay-What-It-Takes India Initiative Survey of Nonprofits 2025 conducted by The Bridgespan Group.

Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2025

Q3: In the past three years, how many funders contributed a fair (proportionate) share of your core costs?

% of total respondents



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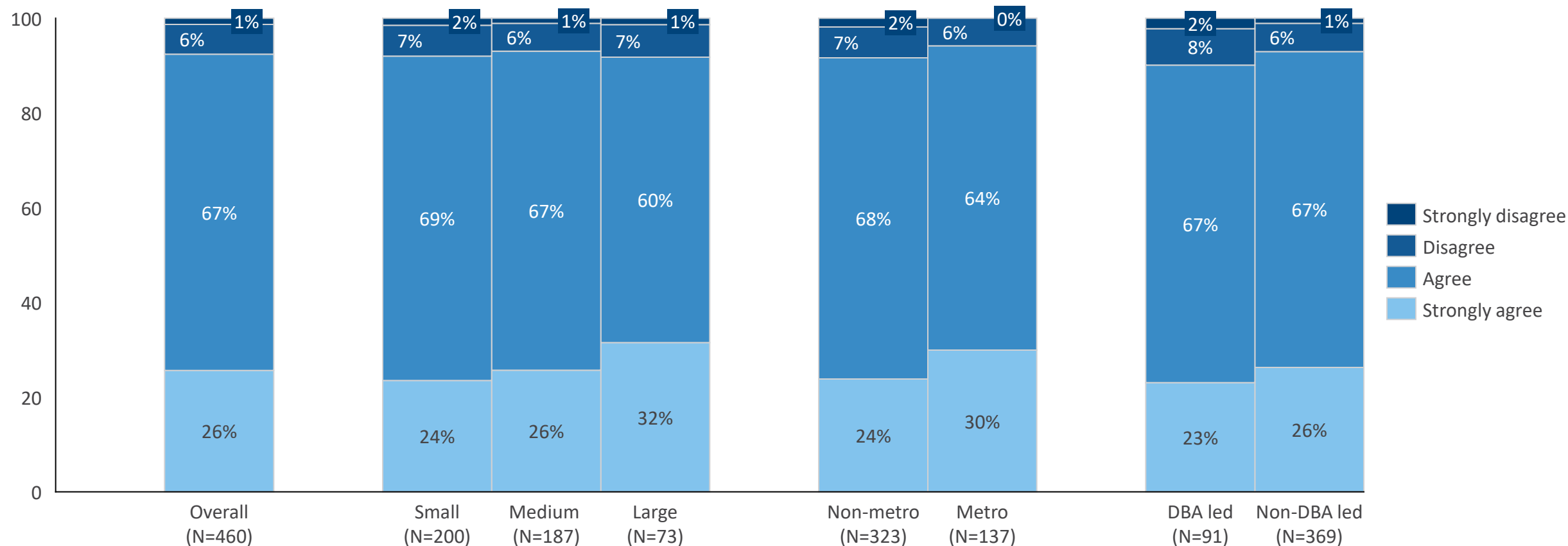
Source: Pay-What-It-Takes India Initiative Survey of Nonprofits 2025 conducted by The Bridgespan Group.

Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2025

Q4: Please share the extent to which you agree or disagree with the following statements based on your organisation's experience in the past three years (since 2022).

(A) We have made efforts to accurately calculate our core-cost needs.

% of total respondents



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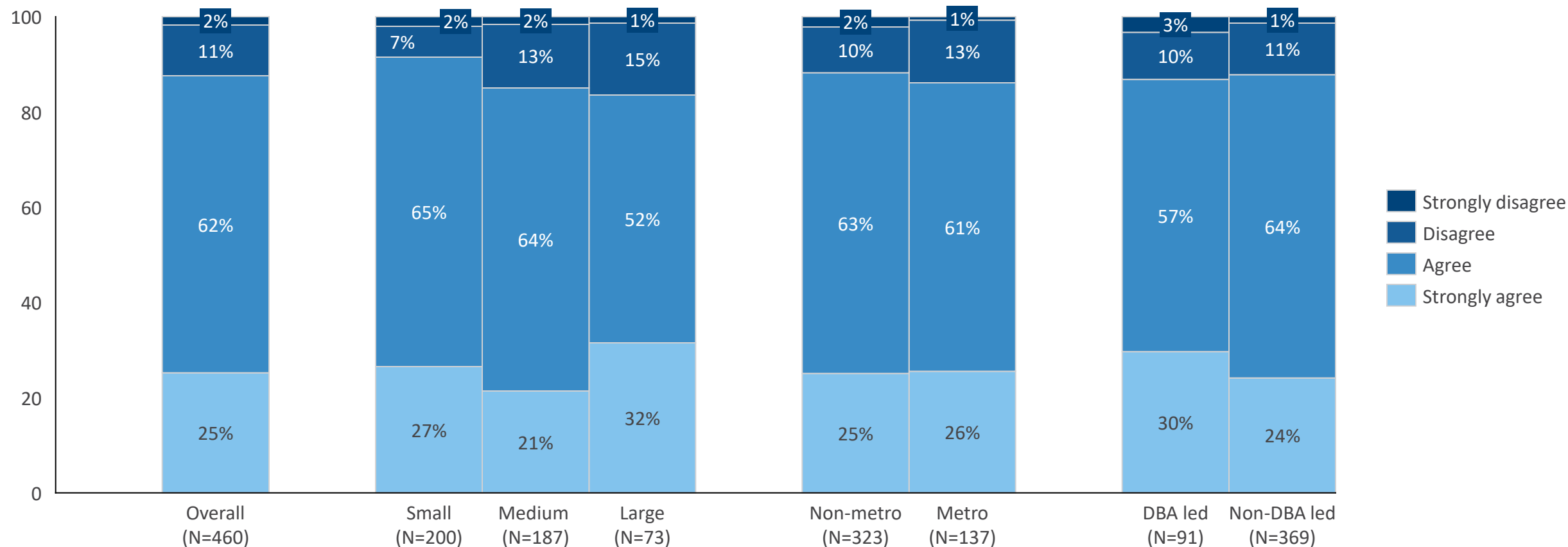
Source: Pay-What-It-Takes India Initiative Survey of Nonprofits 2025 conducted by The Bridgespan Group.

Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2025

Q4: Please share the extent to which you agree or disagree with the following statements based on your organisation's experience in the past three years (since 2022).

(B) We state our core-cost needs to funders in our proposals.

% of total respondents



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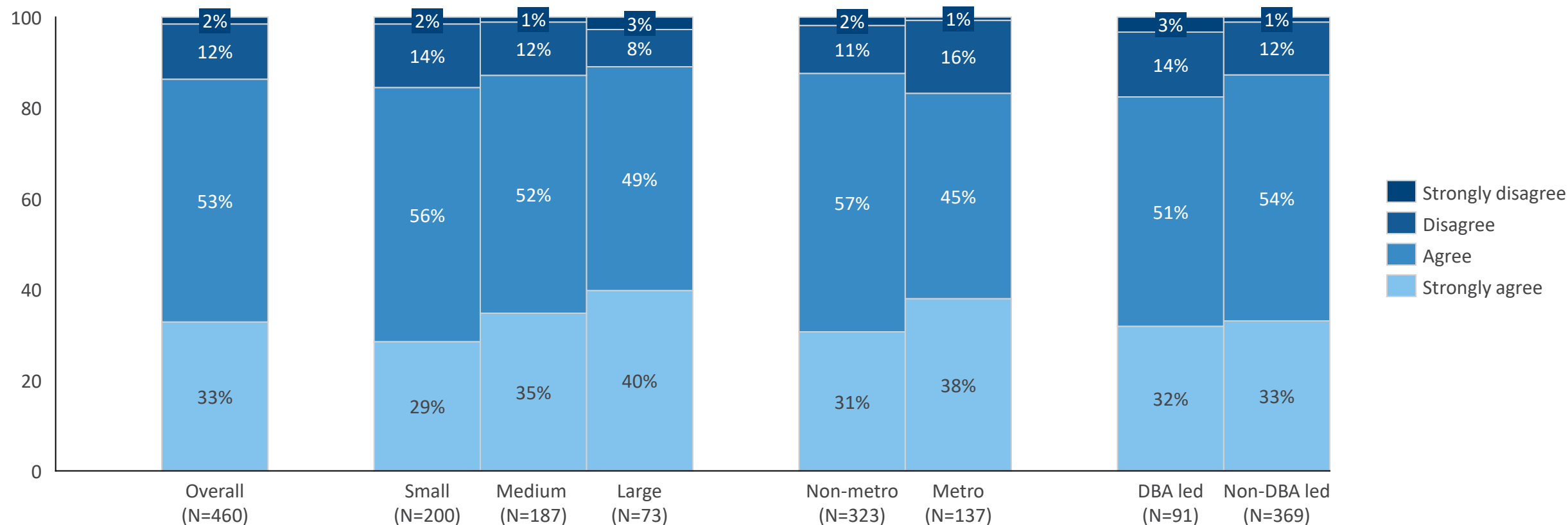
Source: Pay-What-It-Takes India Initiative Survey of Nonprofits 2025 conducted by The Bridgespan Group.

Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2025

Q4: Please share the extent to which you agree or disagree with the following statements based on your organisation's experience in the past three years (since 2022).

(C) Ensuring coverage of core costs is a challenge for us.

% of total respondents



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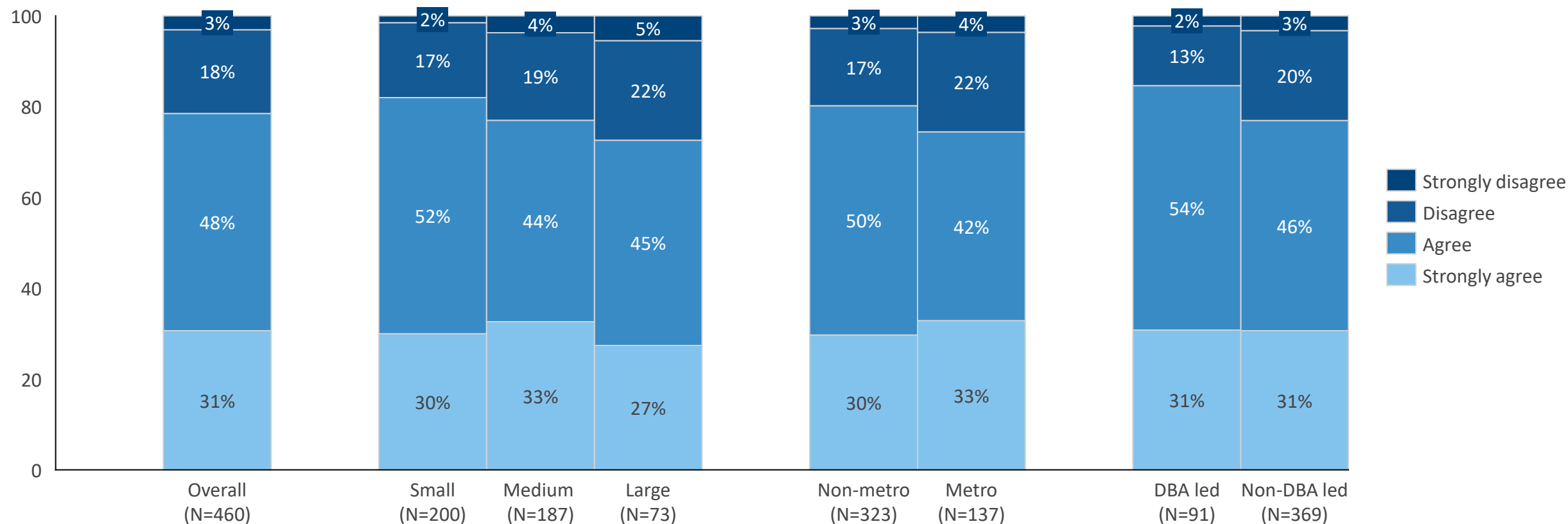
This question was also asked in 2020. [Click here to view the data](#)

Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2025

Q4: Please share the extent to which you agree or disagree with the following statements based on your organisation's experience in the past three years (since 2022).

(D) We are unable to adequately staff critical functions (e.g. finance, HR, administration) due to some funders not contributing their fair share of core costs.

% of total respondents



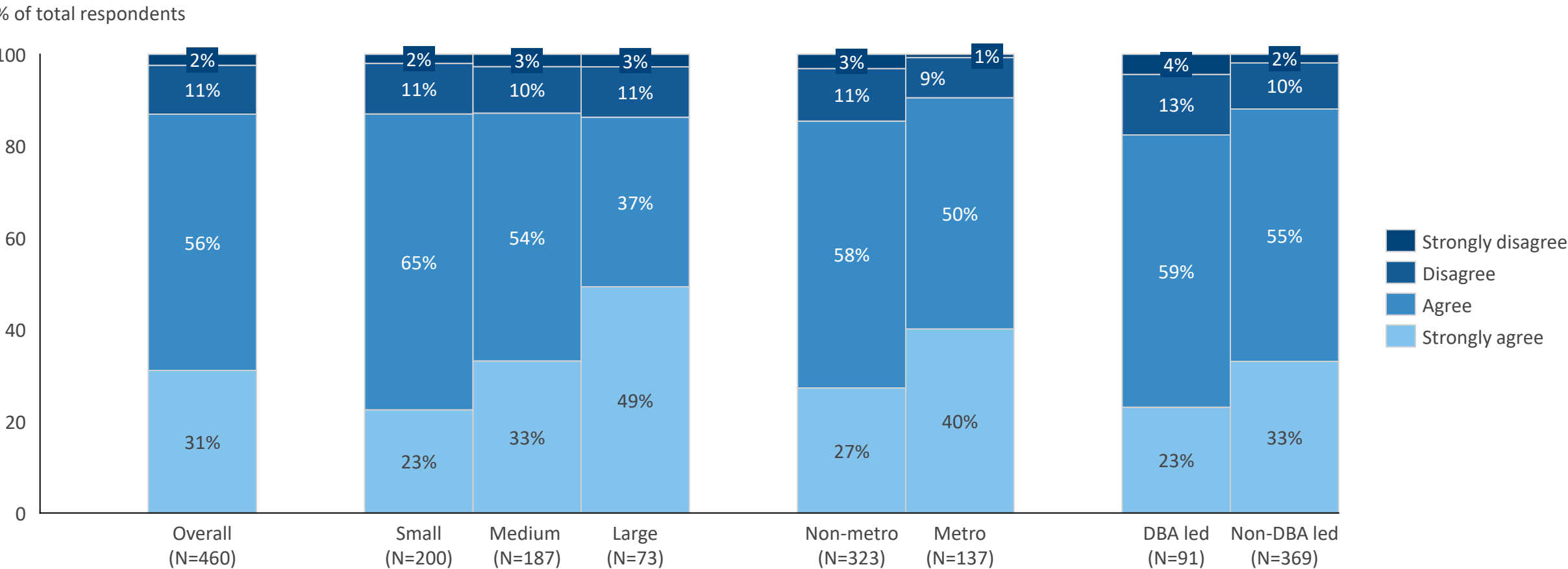
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Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2025

Q4: Please share the extent to which you agree or disagree with the following statements based on your organisation’s experience in the past three years (since 2022).

(E) We often have to use flexible funding to cover core costs.

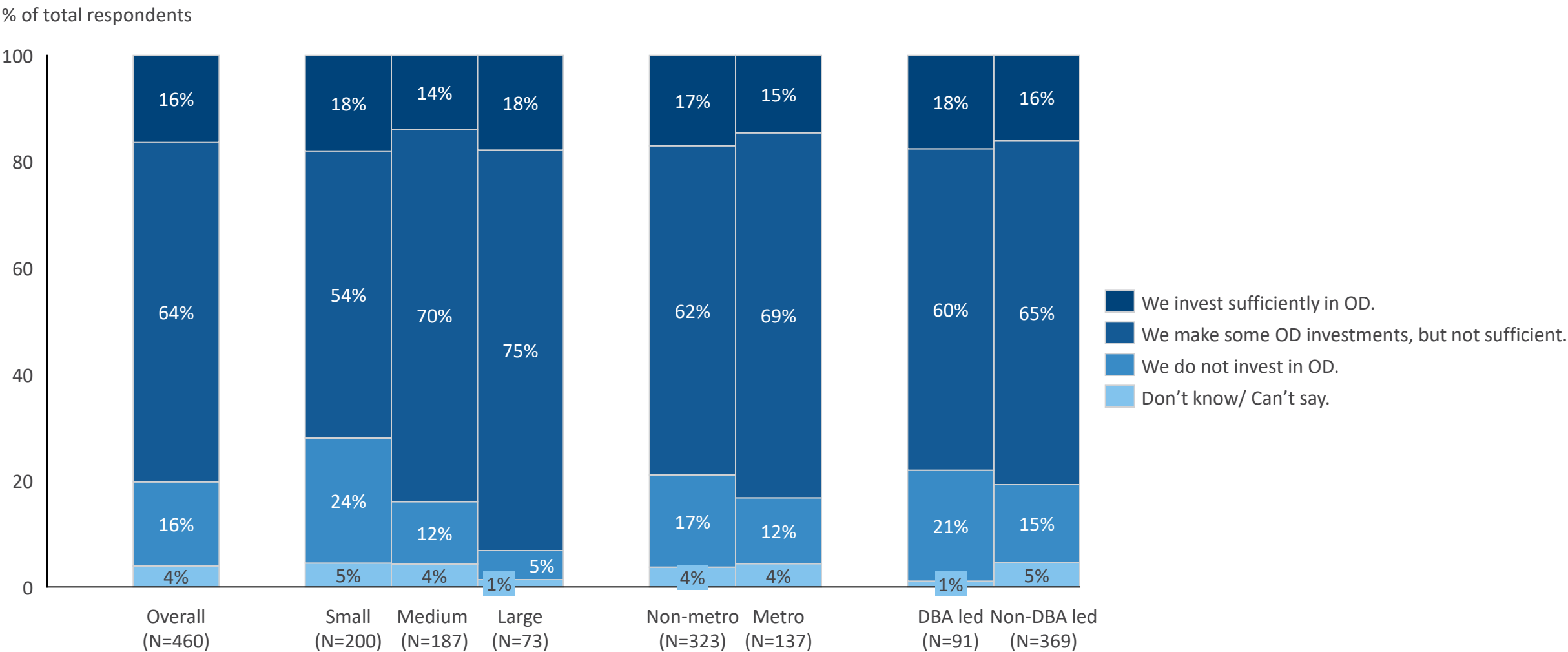


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Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2025

Q5: In the last three years, how would you describe your organisation’s investment in OD?



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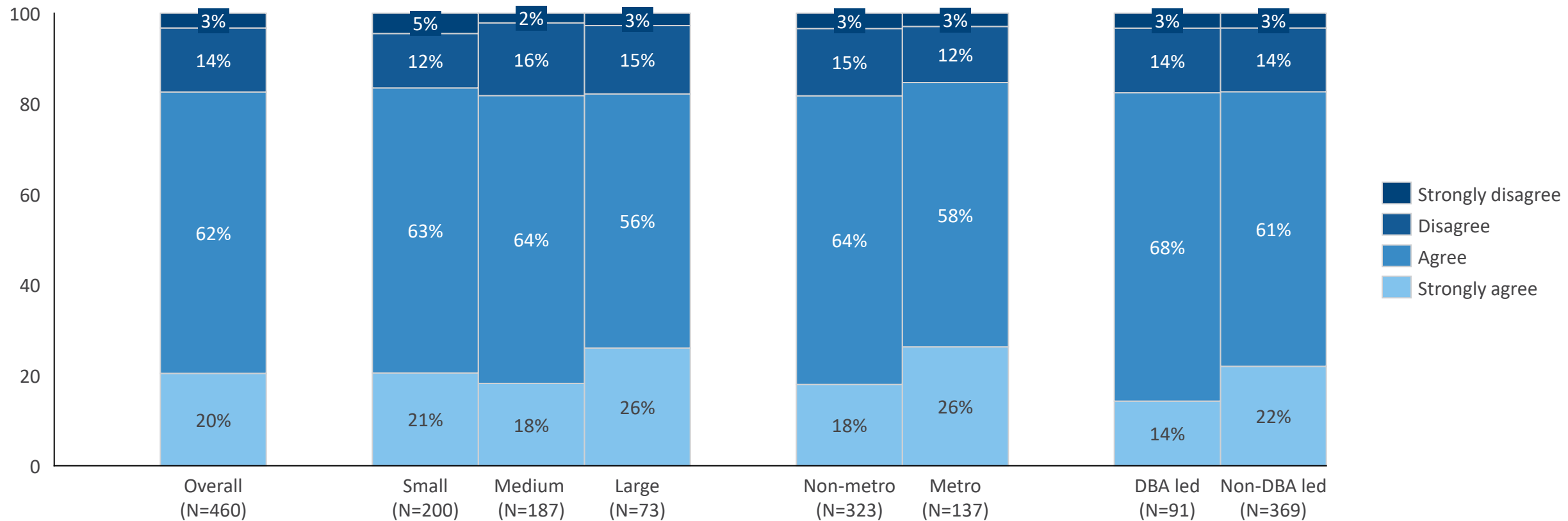
This question was also asked in 2020. [Click here to view the data](#)

Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2025

Q6: Please share the extent to which you agree or disagree with the following statements based on your organisation's experience in the past three years (since 2022).

(A) We have made efforts to calculate our OD needs.

% of total respondents



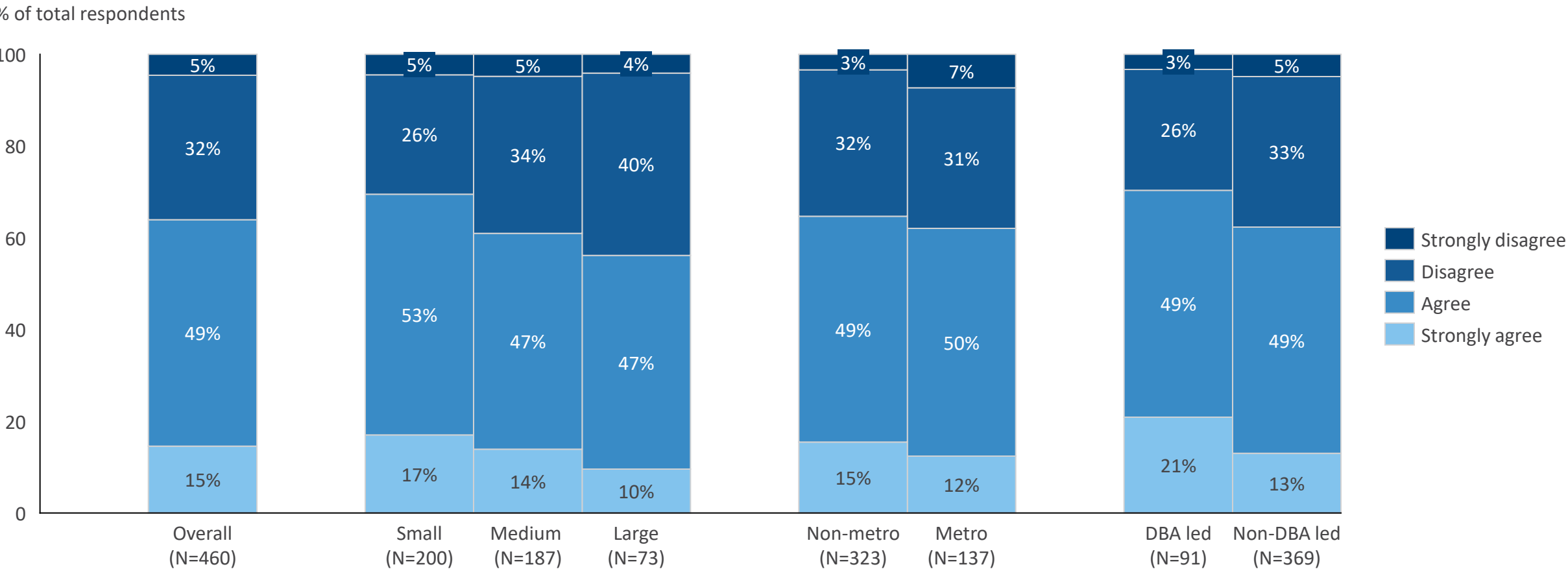
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Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2025

Q6: Please share the extent to which you agree or disagree with the following statements based on your organisation’s experience in the past three years (since 2022).

(B) We state our OD needs to funders at the proposal stage and provide a clear action plan.



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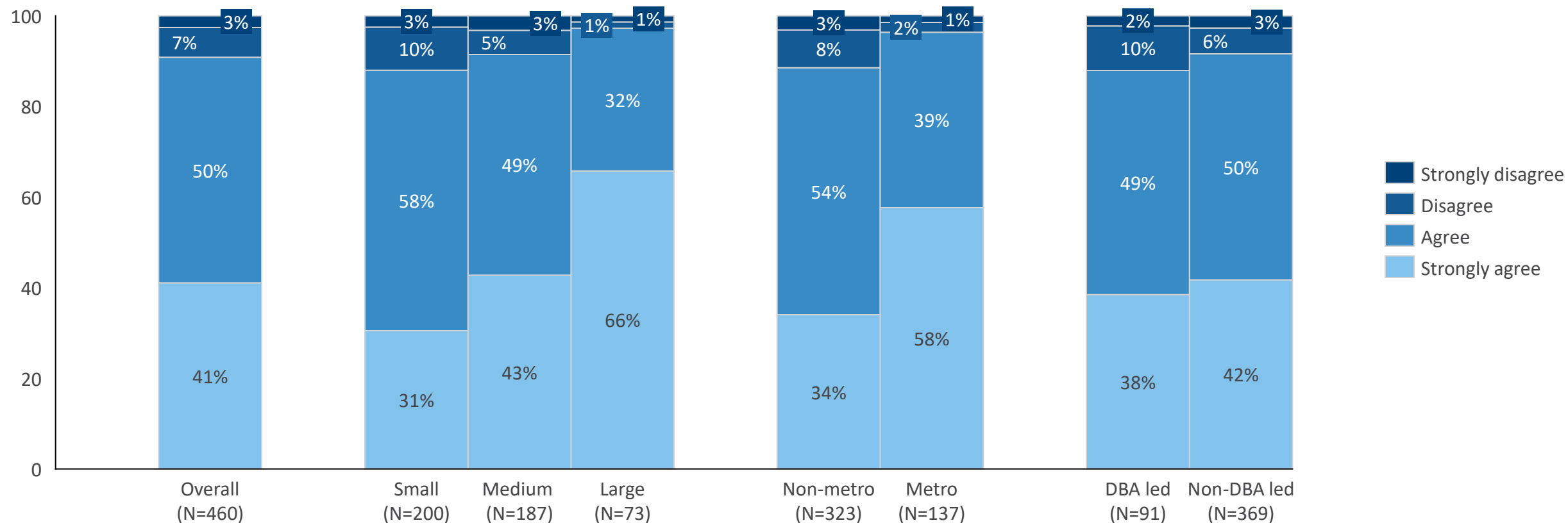
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Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2025

Q6: Please share the extent to which you agree or disagree with the following statements based on your organisation's experience in the past three years (since 2022).

(C) It takes more time and resources to raise funds for OD as compared to programmes.

% of total respondents



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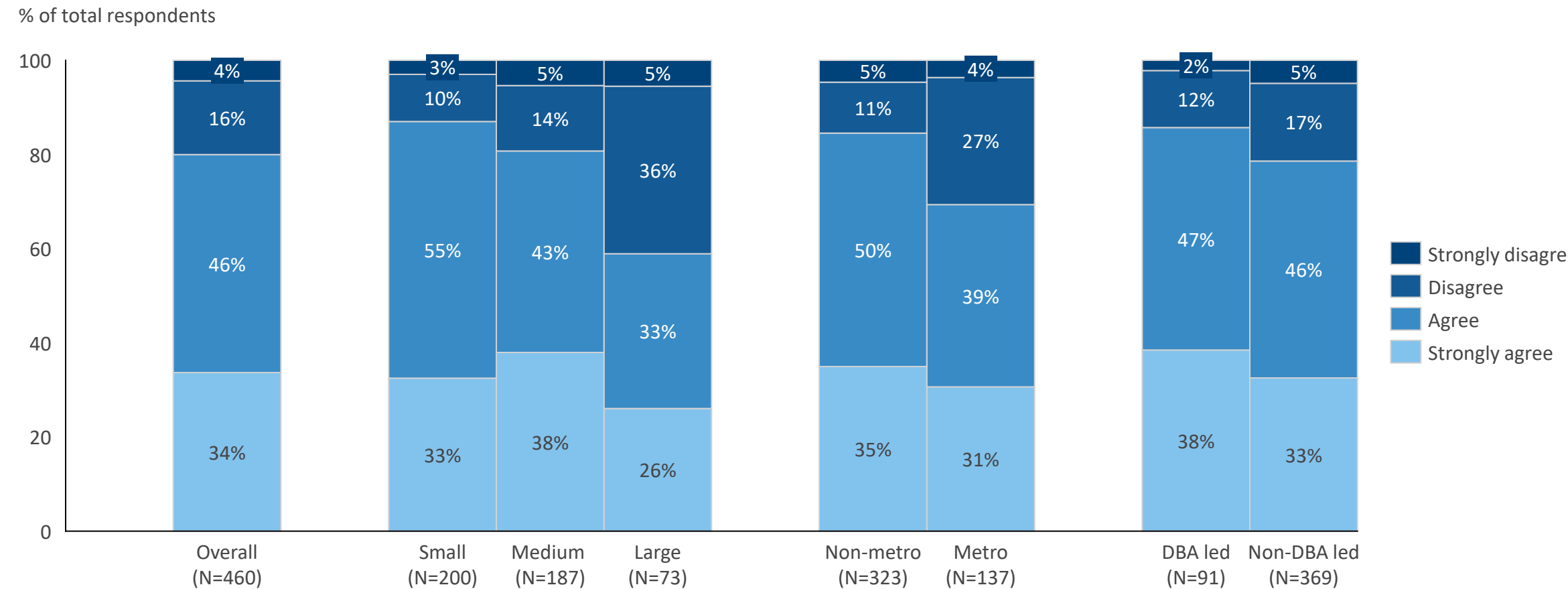
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This question was also asked in 2020. [Click here to view the data](#)

Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2025

Q6: Please share the extent to which you agree or disagree with the following statements based on your organisation’s experience in the past three years (since 2022).

(D) We were unable to hire for a key leadership position due to funding constraints.



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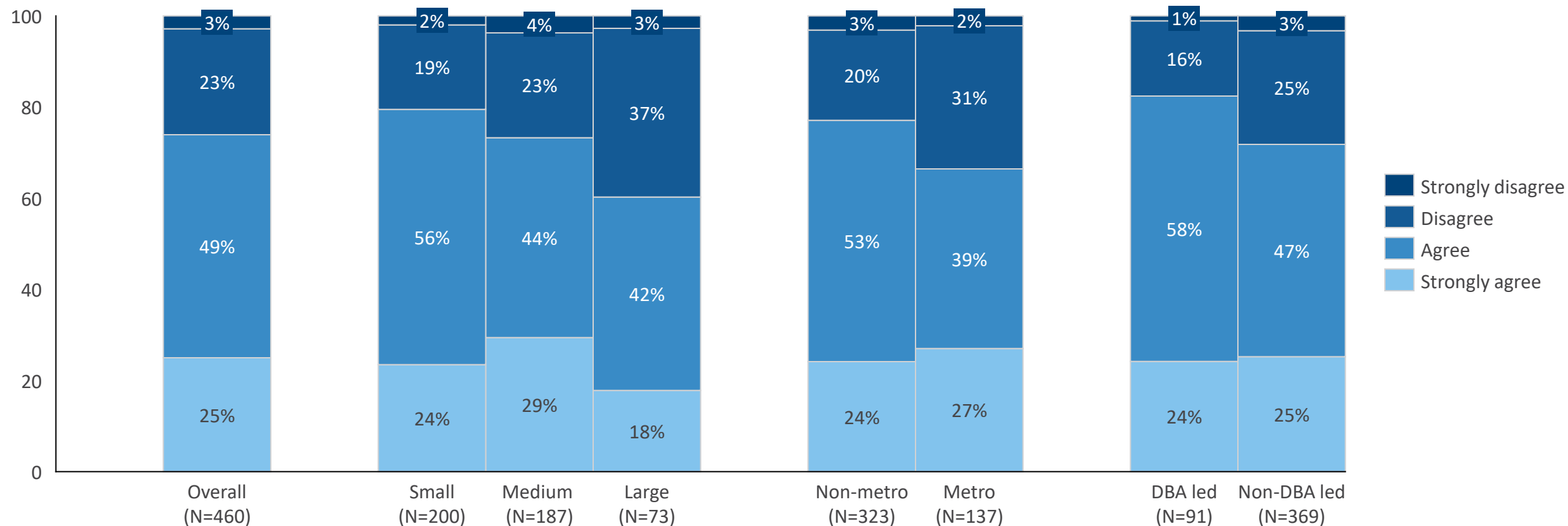
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Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2025

Q6: Please share the extent to which you agree or disagree with the following statements based on your organisation's experience in the past three years (since 2022).

(E) We have not been able to make key organisational development investment(s) required to deliver better outcomes/ impact.

% of total respondents



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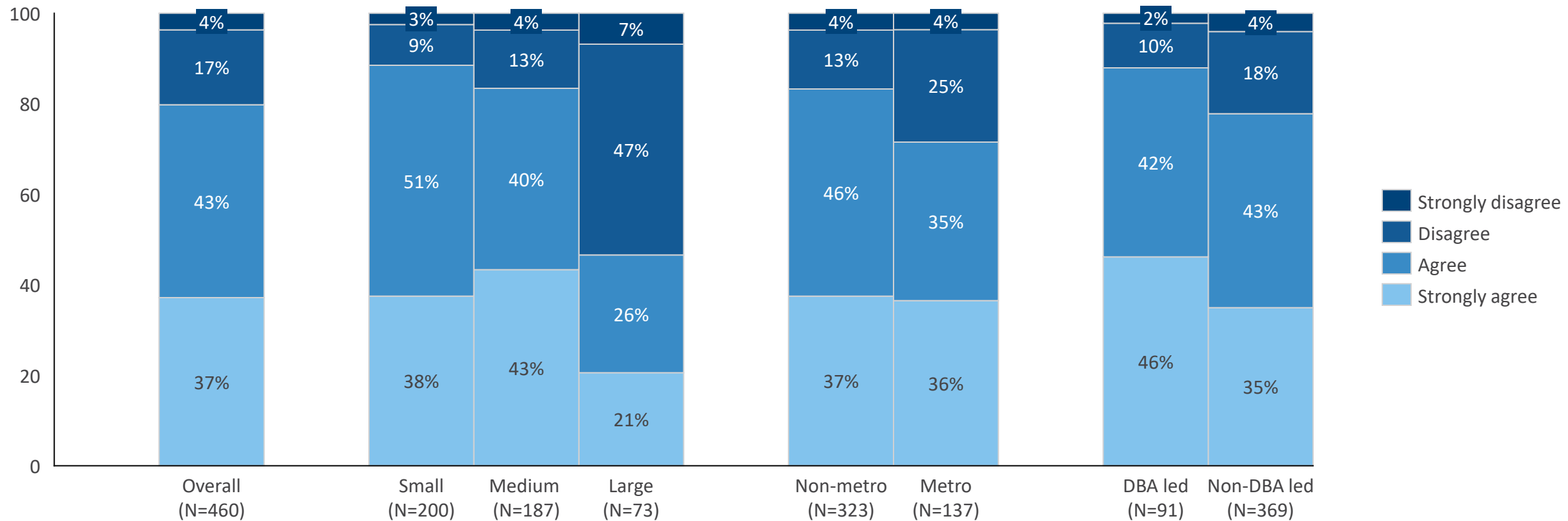
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Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2025

Q6: Please share the extent to which you agree or disagree with the following statements based on your organisation's experience in the past three years (since 2022).

(F) We have missed fundraising opportunities due to the lack of a dedicated fundraising/development team.

% of total respondents



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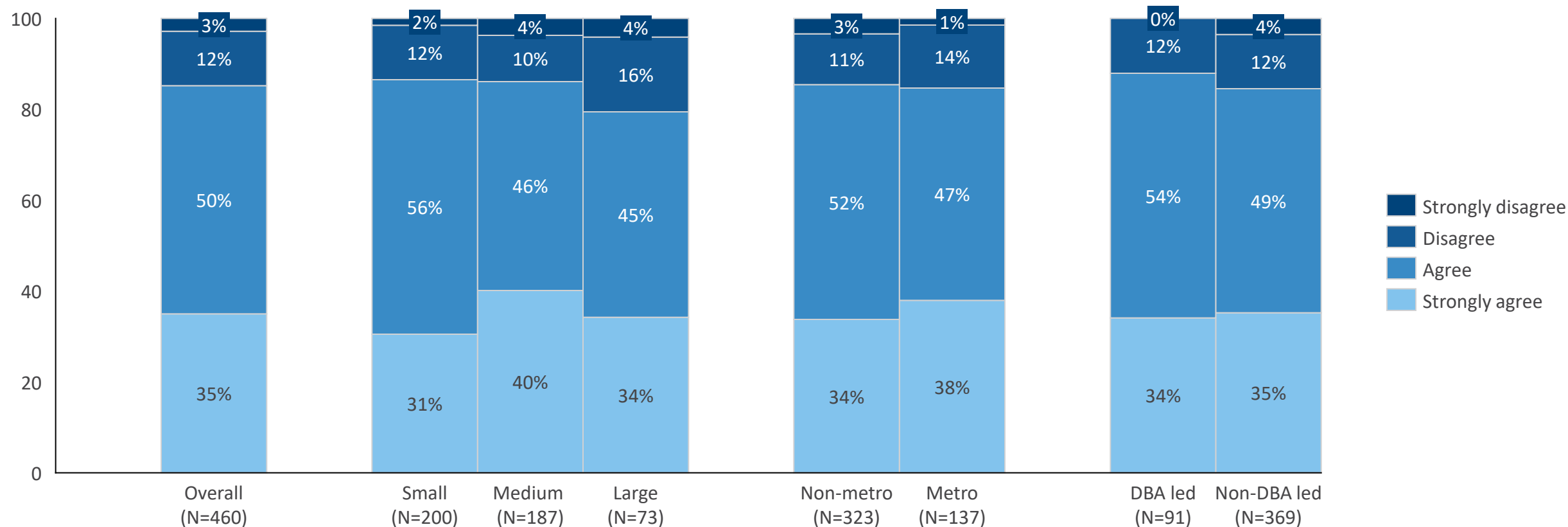
This question was also asked in 2020. [Click here to view the data](#)

Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2025

Q6: Please share the extent to which you agree or disagree with the following statements based on your organisation's experience in the past three years (since 2022).

(G) Lack of flexible/unrestricted funding has limited our ability to innovate and improve programmes.

% of total respondents



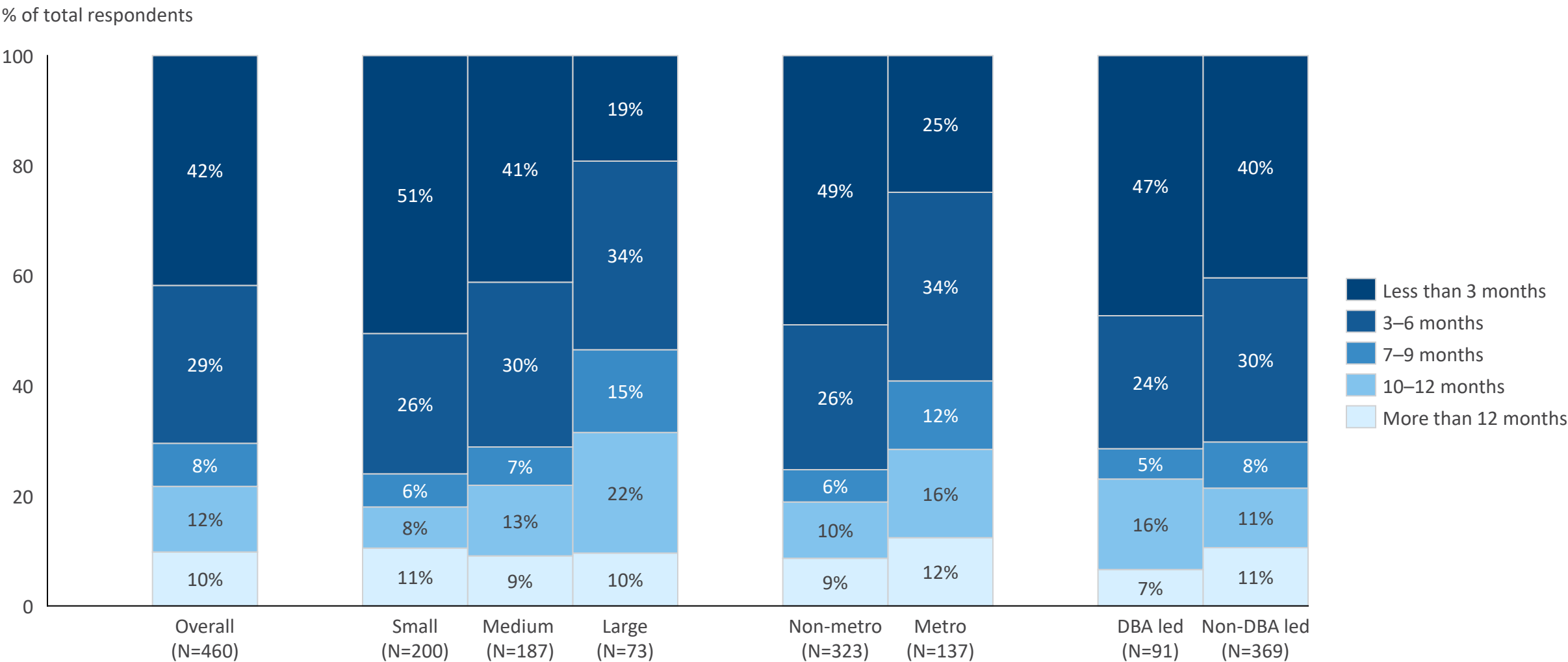
Note: Any discrepancies in percentage totals are due to rounding. **Metro organisations** are those with headquarters in Ahmedabad, Bangalore, Chennai, Delhi NCR, Hyderabad, Kolkata, Mumbai, and Pune. **Small organisations** are those with annual budgets less than Rs 1 crore, **medium-scale organisations** are those with annual budgets between Rs 1 to 10 crore and **large organisations** are those with annual budgets over Rs 10 crore. **DBA-led organisations** include those whose leaders belong to the Dalit, Bahujan or Adivasi communities.

Source: Pay-What-It-Takes India Initiative Survey of Nonprofits 2025 conducted by The Bridgespan Group.

This question was also asked in 2020. [Click here to view the data](#)

Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2025

Q7: Currently, how many months of operating reserves do you have?

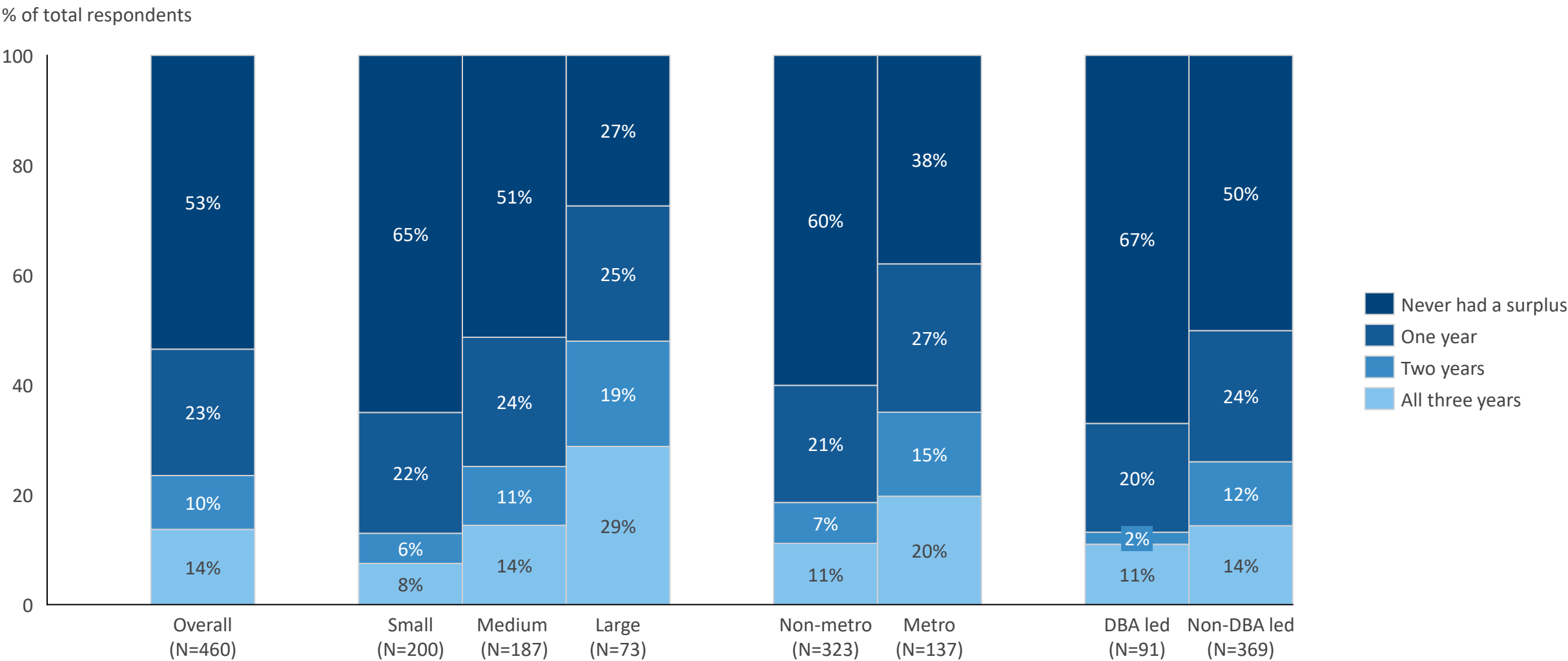


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Source: Pay-What-It-Takes India Initiative Survey of Nonprofits 2025 conducted by The Bridgespan Group.

This question was also asked in 2020. [Click here to view the data](#)

Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2025

Q8: Over the last three years, how many times did your organisation have an operating surplus at the end of the year?



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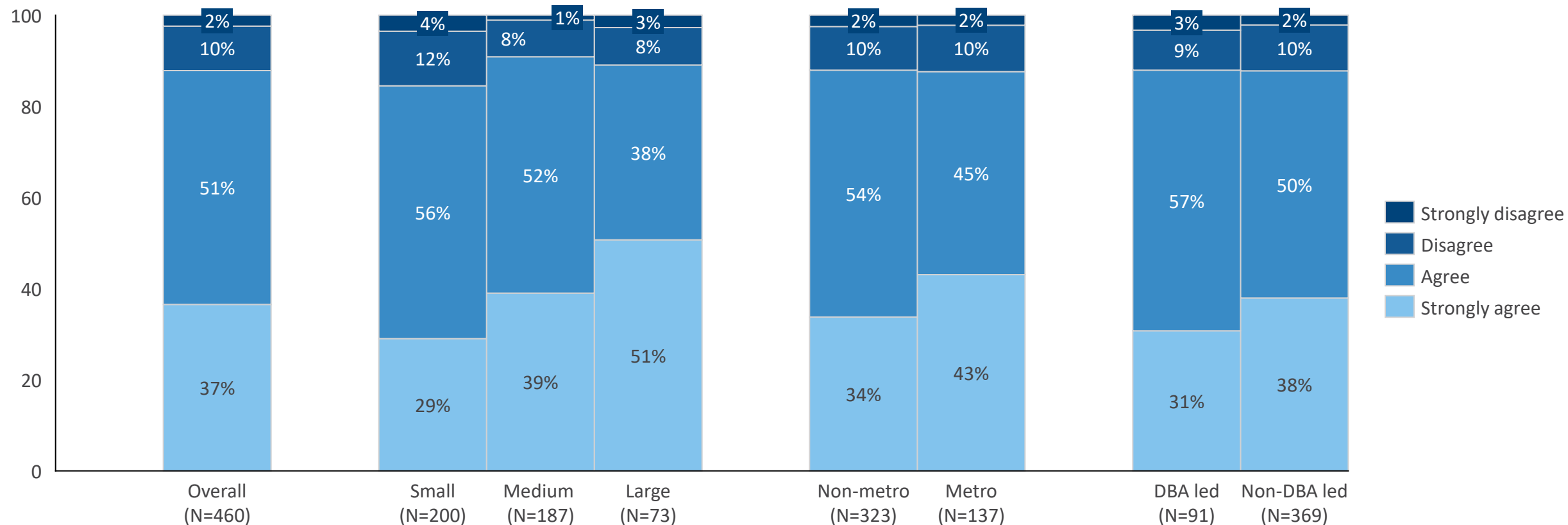
This question was also asked in 2020. [Click here to view the data](#)

Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2025

Q9: Please share the extent to which you agree or disagree with the following statements based on your organisation's experience in the past three years (since 2022).

(A) We actively seek to build financial reserves.

% of total respondents



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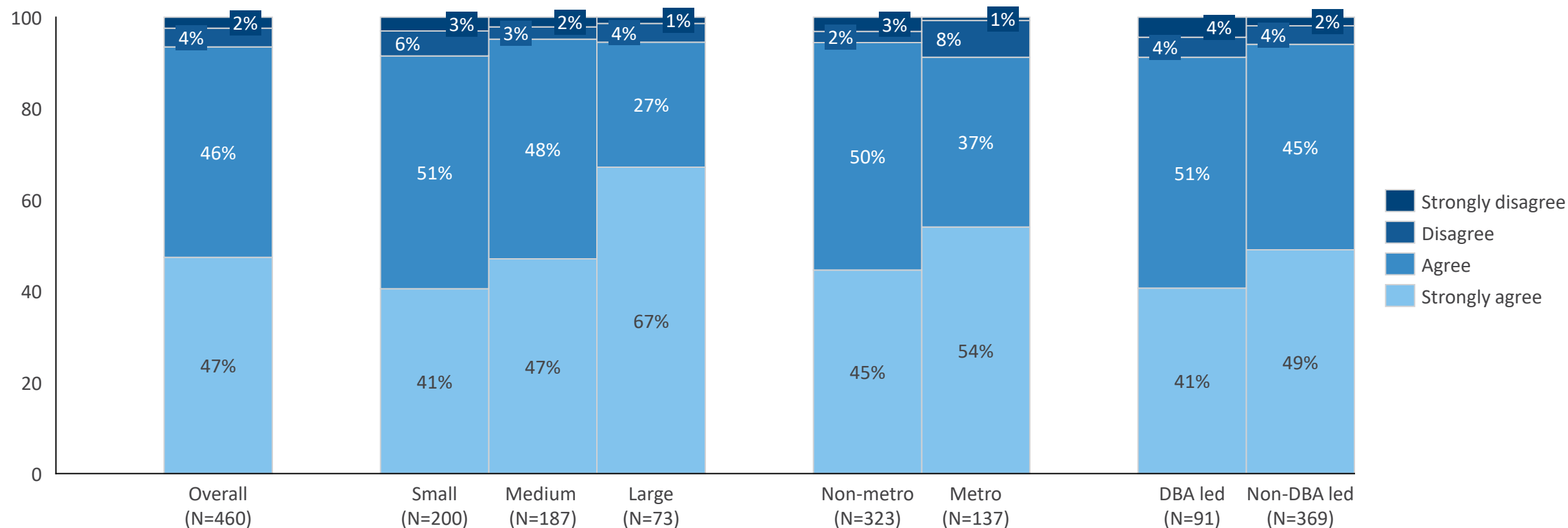
Source: Pay-What-It-Takes India Initiative Survey of Nonprofits 2025 conducted by The Bridgespan Group.

Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2025

Q9: Please share the extent to which you agree or disagree with the following statements based on your organisation's experience in the past three years (since 2022).

(B) We try to raise funding from diverse types of funders (e.g. CSR, foundations etc.).

% of total respondents



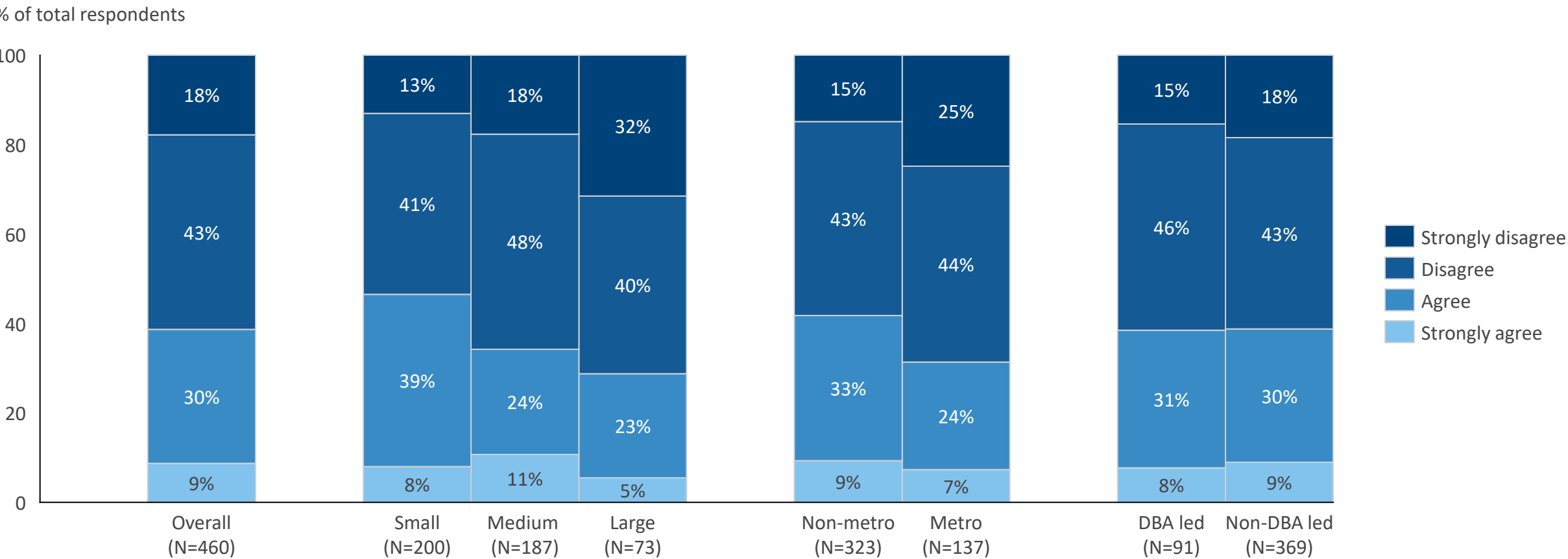
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Source: Pay-What-It-Takes India Initiative Survey of Nonprofits 2025 conducted by The Bridgespan Group.

Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2025

Q9: Please share the extent to which you agree or disagree with the following statements based on your organisation’s experience in the past three years (since 2022).

(C) Funders other than those offering corporate social responsibility (CSR) grants allow us to transfer operating surplus from their grants to build reserves.



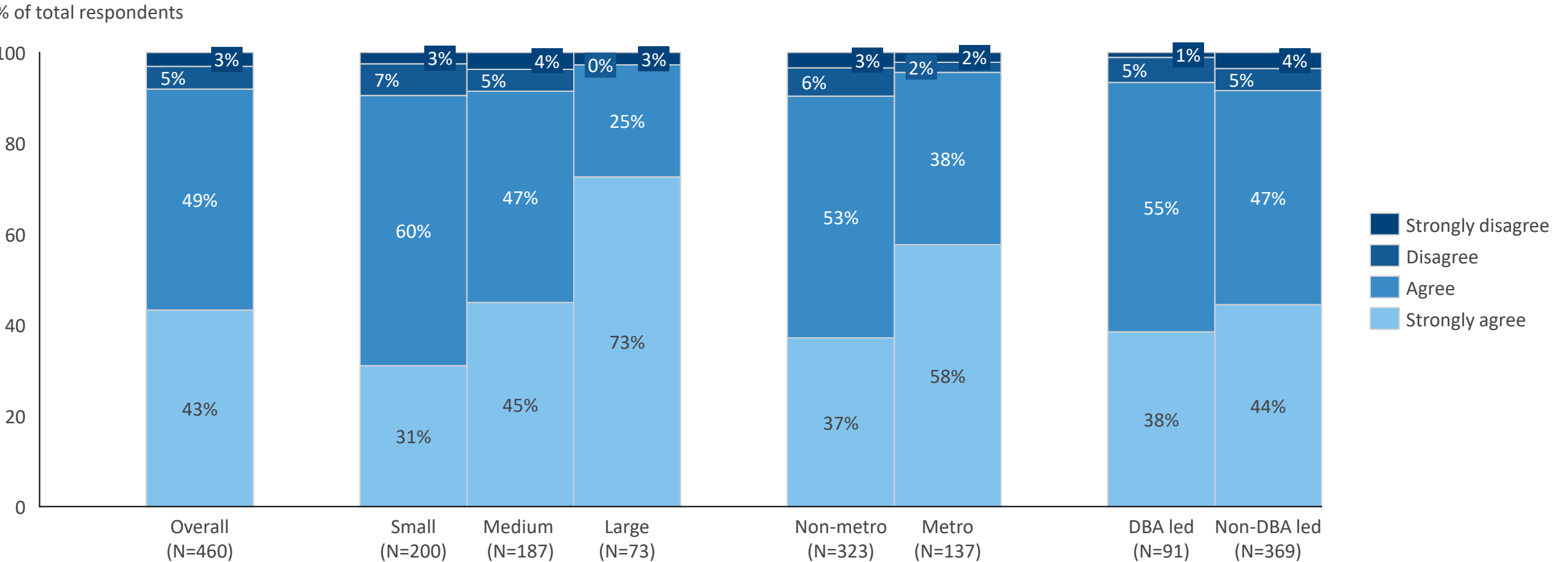
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Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2025

Q9: Please share the extent to which you agree or disagree with the following statements based on your organisation’s experience in the past three years (since 2022).

(D) It is challenging to raise unrestricted grants from funders that can be used to build reserves.



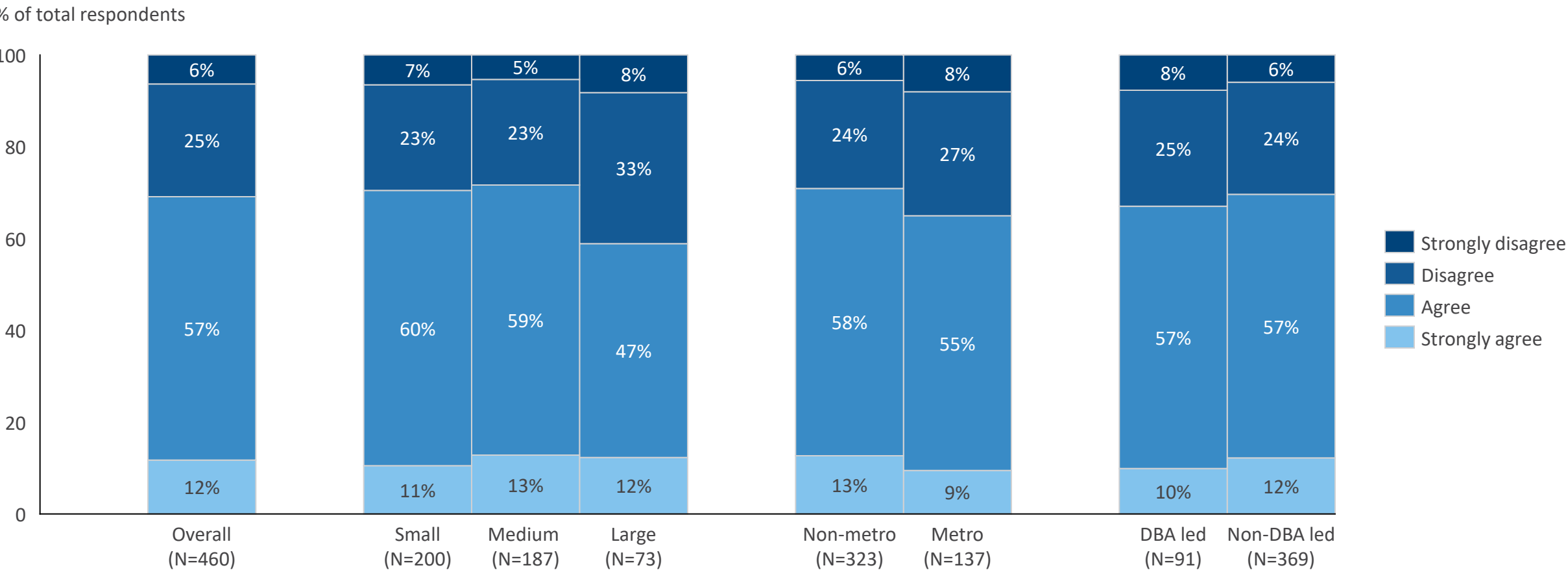
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Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2025

Q10: Please share the extent to which you agree or disagree with the following statements based on your organisation’s experience in the past three years (since 2022).

(A) More funders are aware of the importance of multiyear partnerships with nonprofits.



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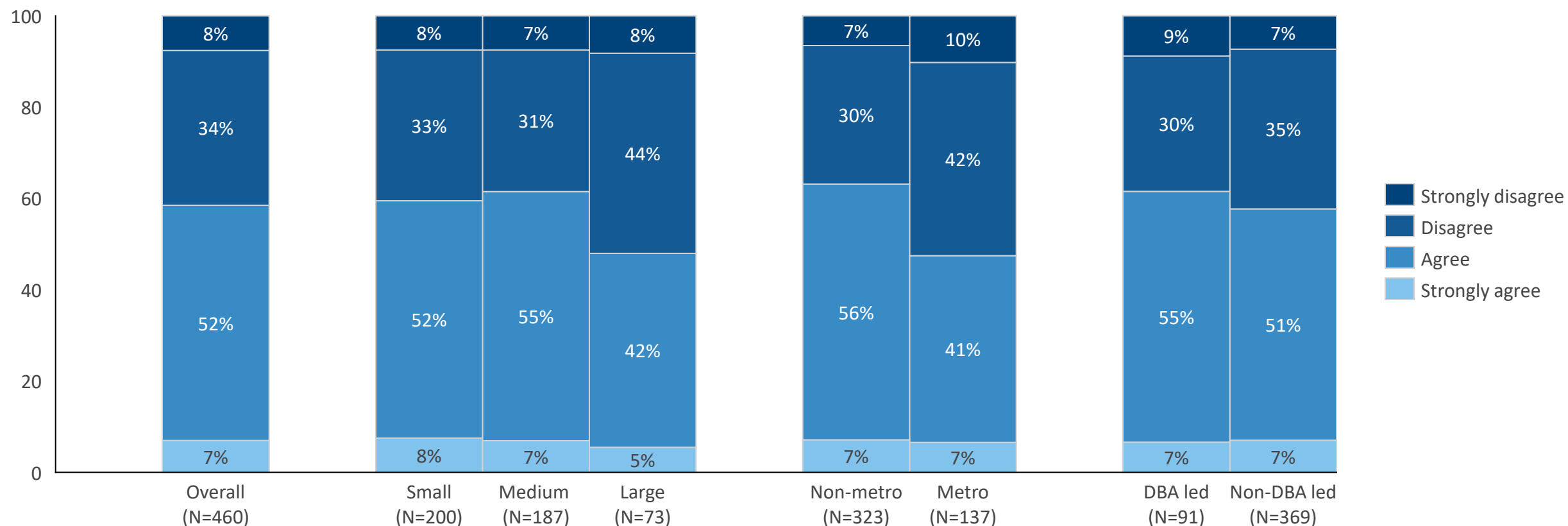
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Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2025

Q10: Please share the extent to which you agree or disagree with the following statements based on your organisation's experience in the past three years (since 2022).

(B) More funders are willing to have conversations on entering into multiyear partnerships.

% of total respondents



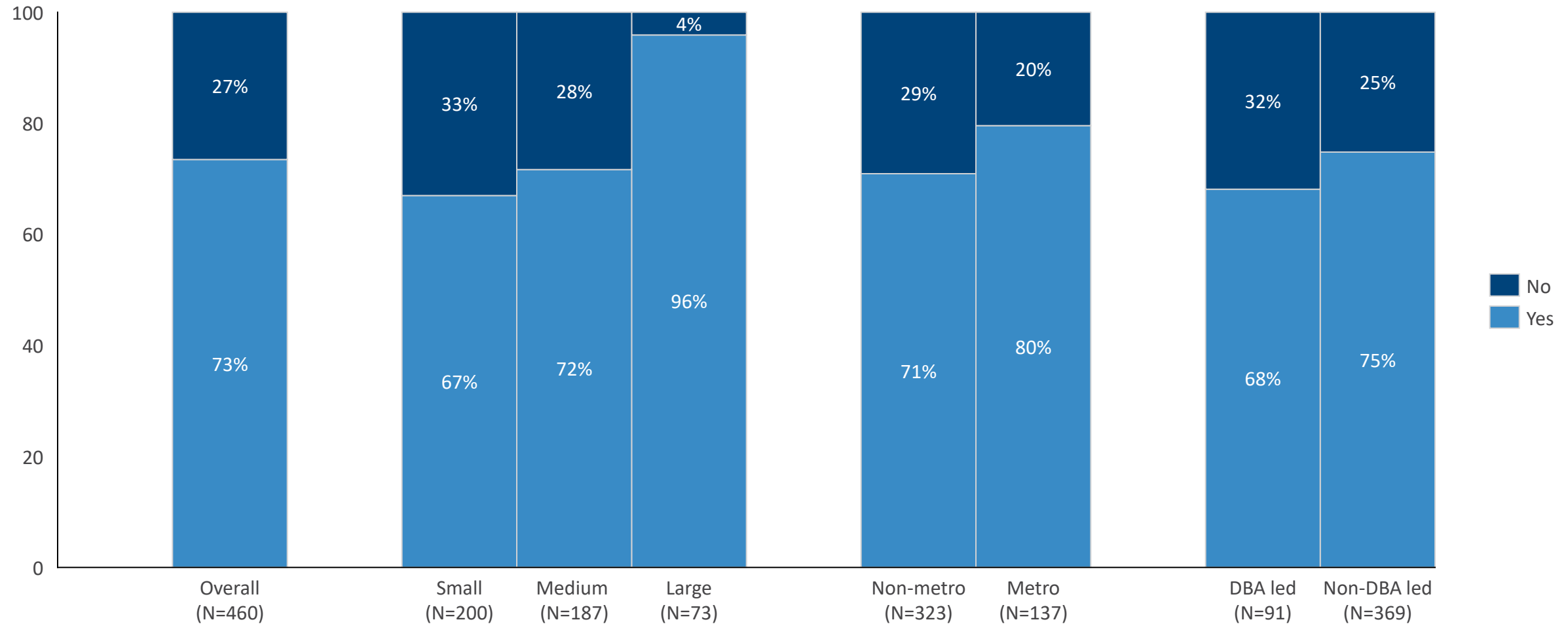
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Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2025

Q11: Have one or more of your funders (both new and existing) started entering into multiyear partnerships over the past three years (since 2022)?

% of total respondents



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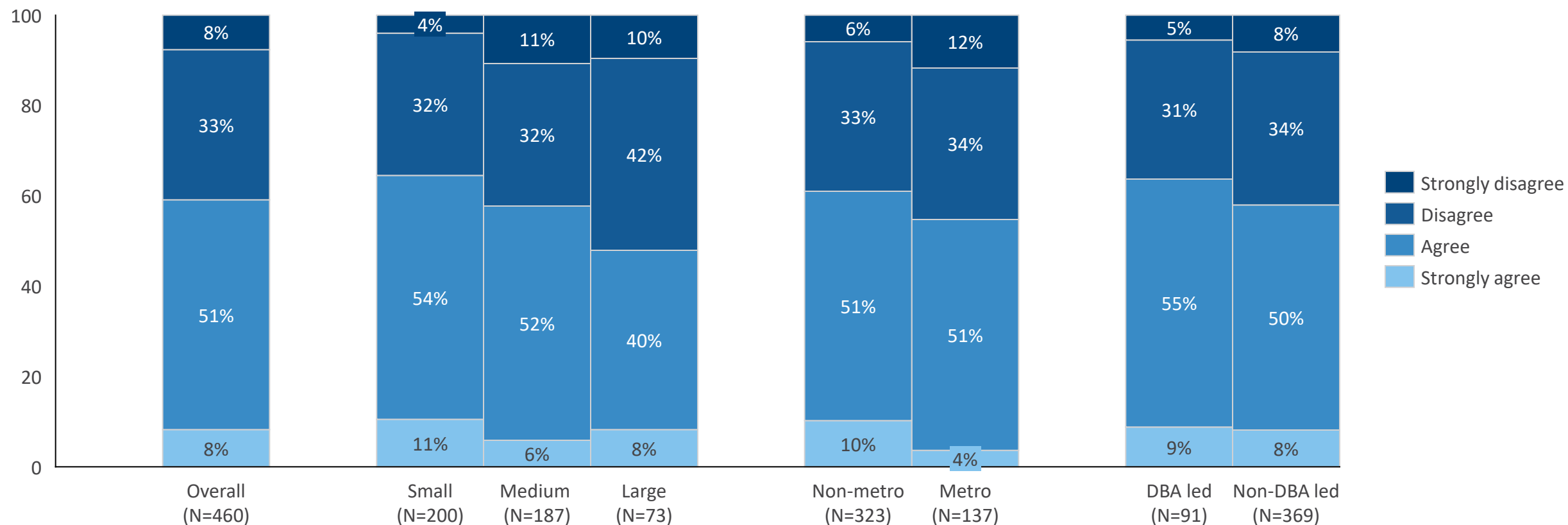
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Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2025

Q12: Please share the extent to which you agree or disagree with the following statements based on your organisation's experience in the past three years (since 2022).

(A) More funders are aware of the importance of core-cost funding.

% of total respondents



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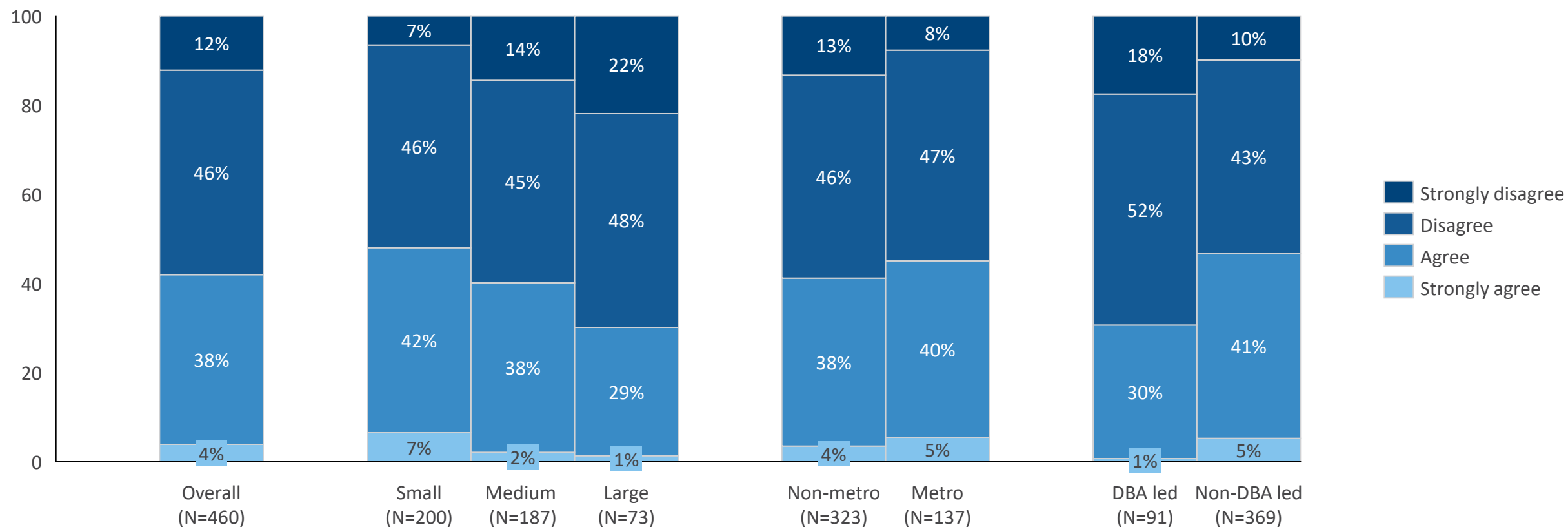
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Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2025

Q12: Please share the extent to which you agree or disagree with the following statements based on your organisation's experience in the past three years (since 2022).

(B) More funders are willing to have conversations on our core-cost needs.

% of total respondents

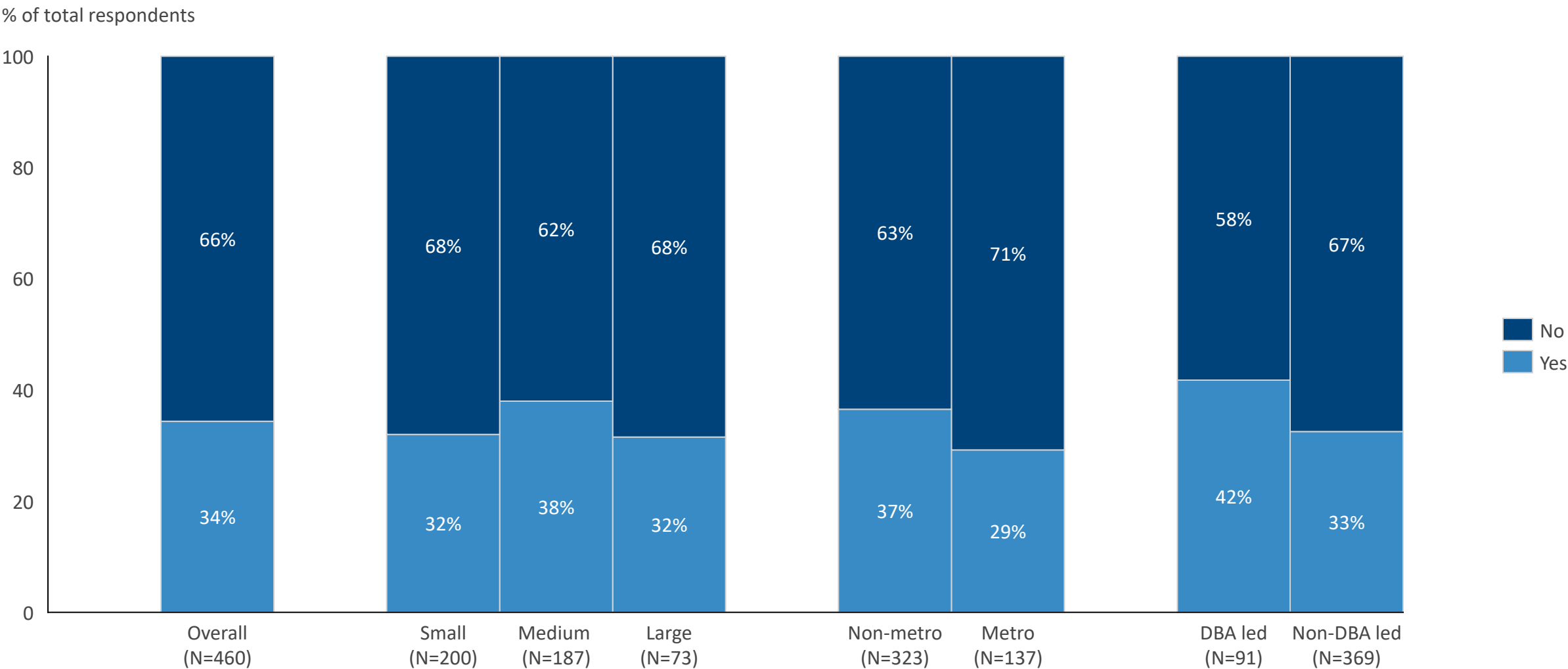


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Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2025

Q13: Have one or more of your funders increased their allocation for core costs over the past three years (since 2022)?

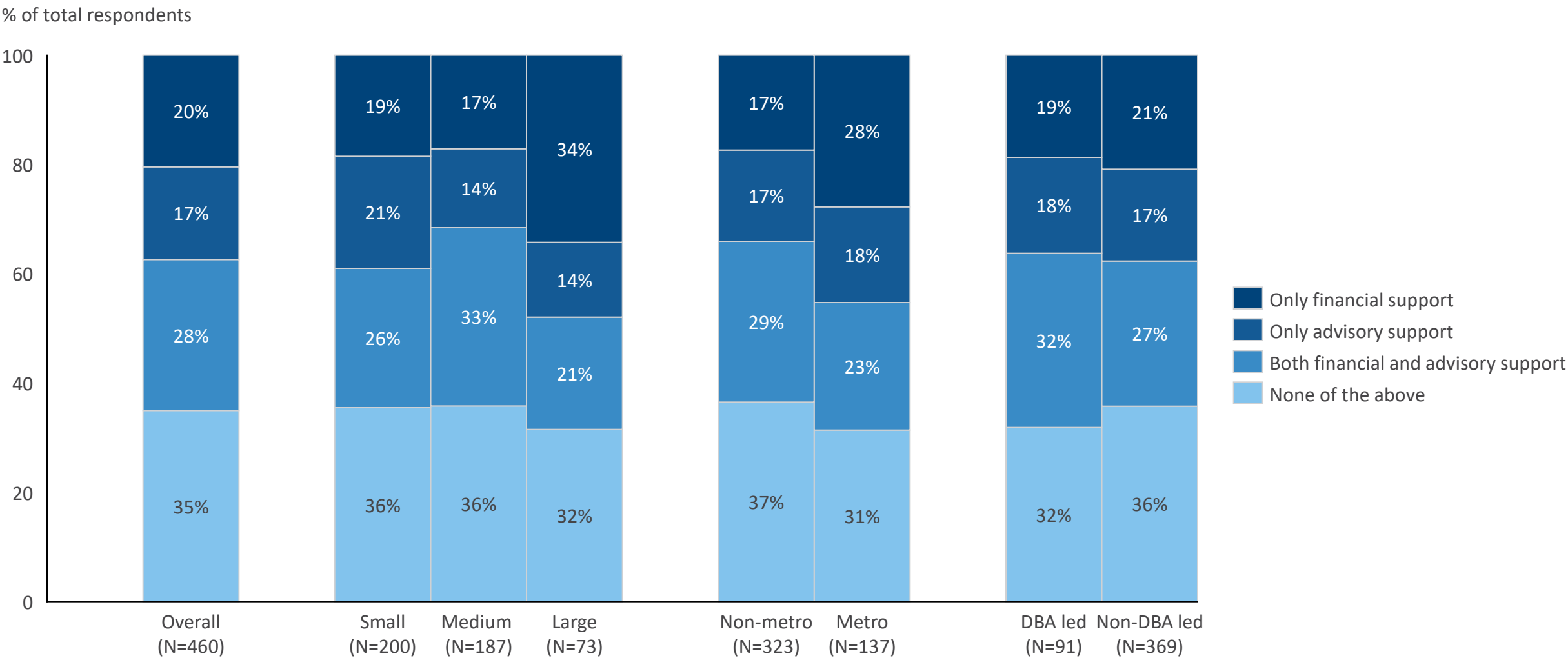


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Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2025

Q14: In the last three years, have your funders provided any support for your OD needs?



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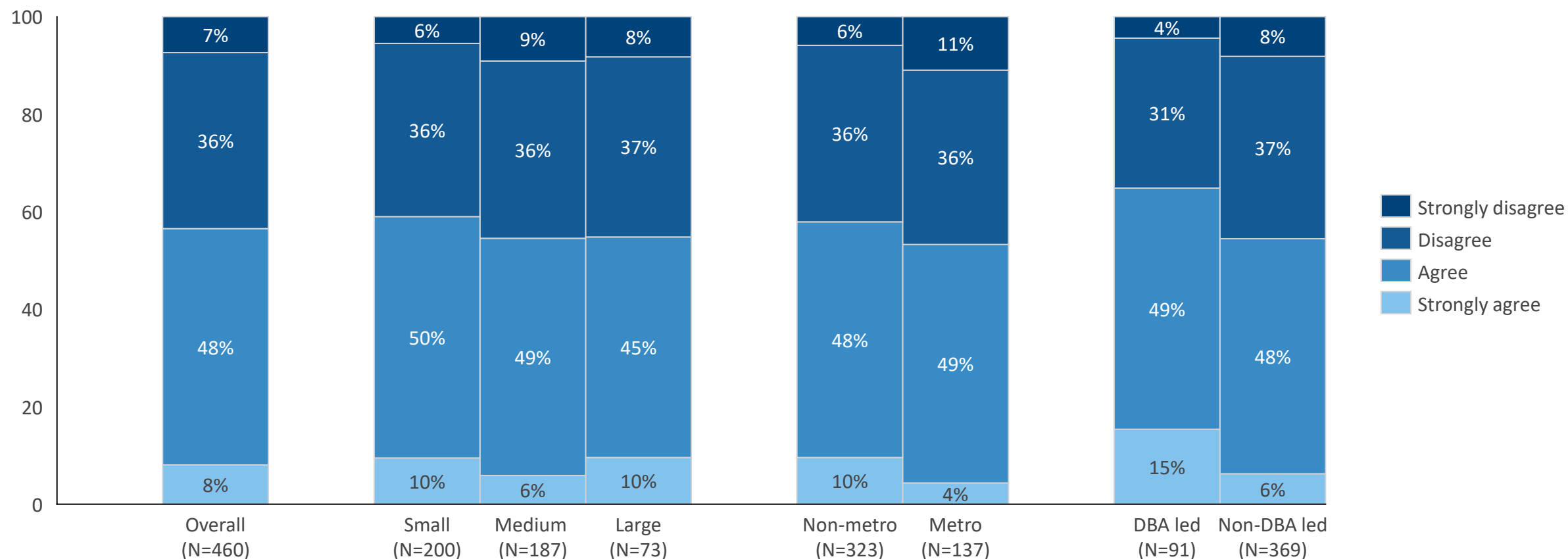
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Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2025

Q15: Please share the extent to which you agree or disagree with the following statements based on your organisation's experience in the past three years (since 2022).

(A) More funders are aware of the importance of OD investments.

% of total respondents



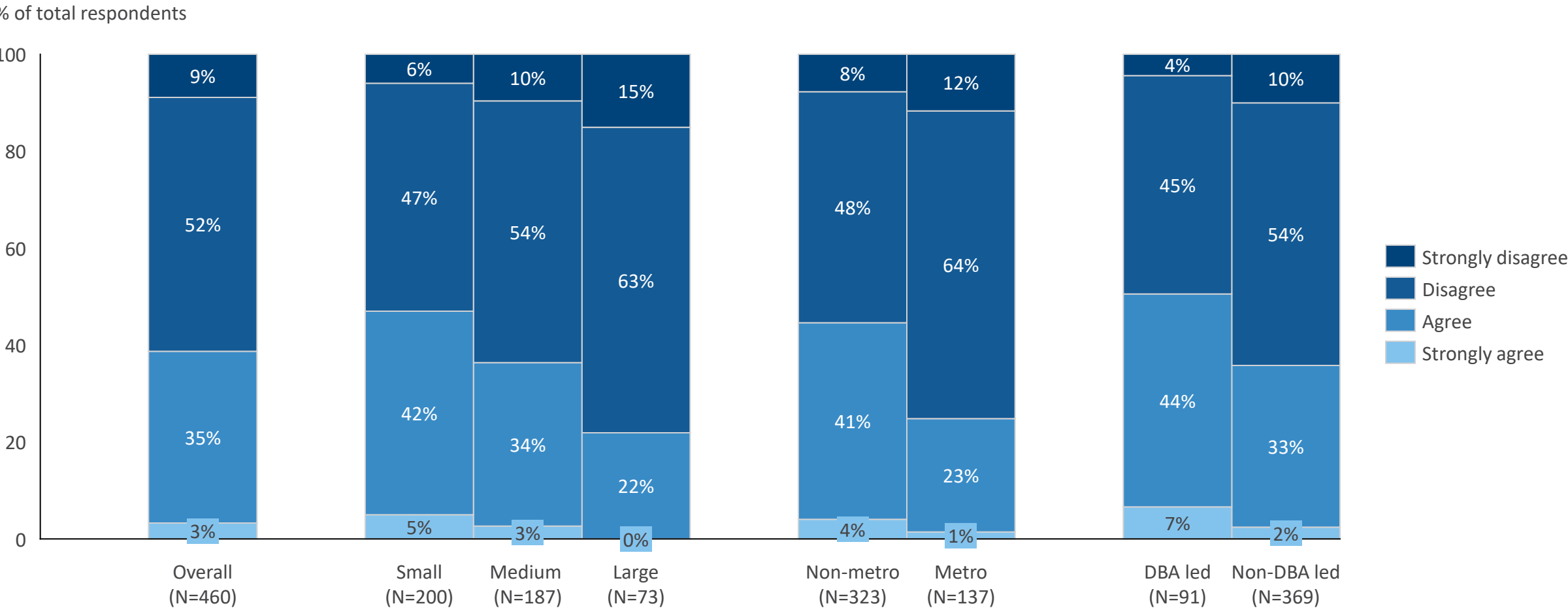
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Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2025

Q15: Please share the extent to which you agree or disagree with the following statements based on your organisation’s experience in the past three years (since 2022).

(B) More funders are willing to have conversations on OD needs.



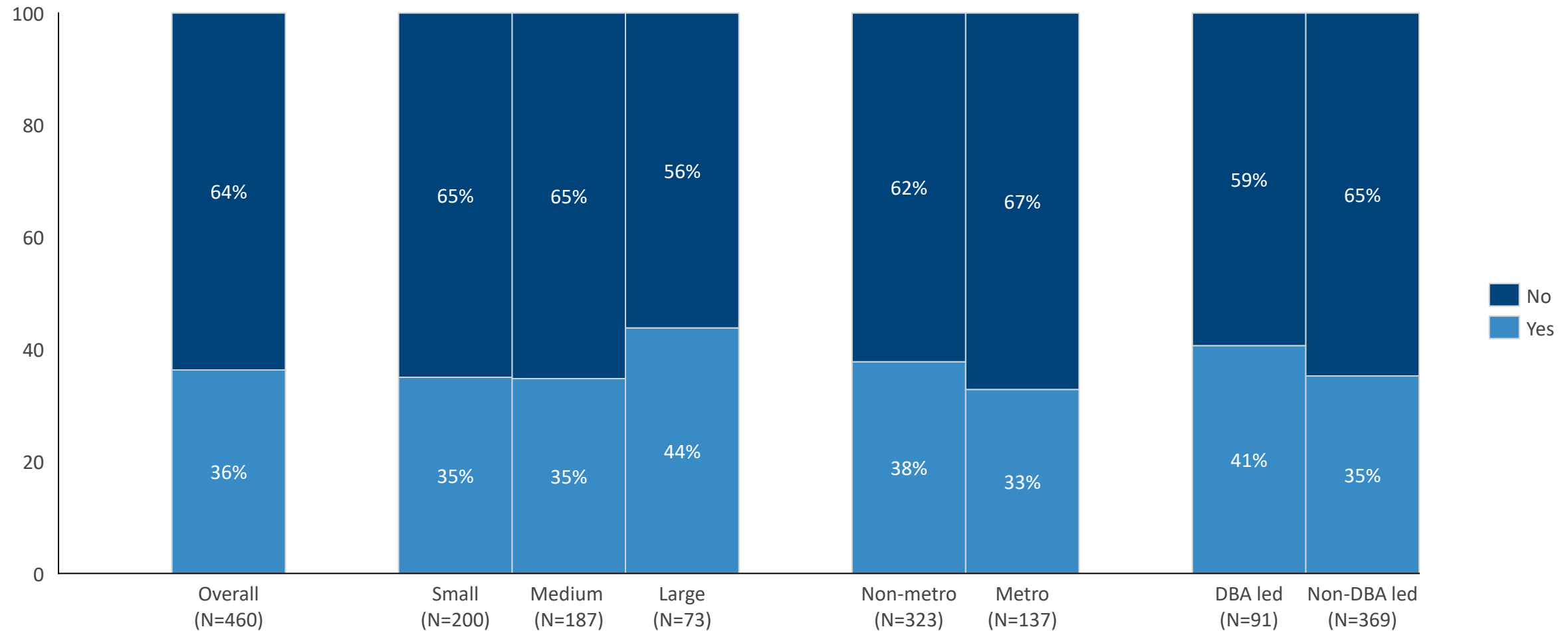
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Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2025

Q16: Have one or more of your funders started supporting or increased their support for your OD needs over the past three years (since 2022)?

% of total respondents



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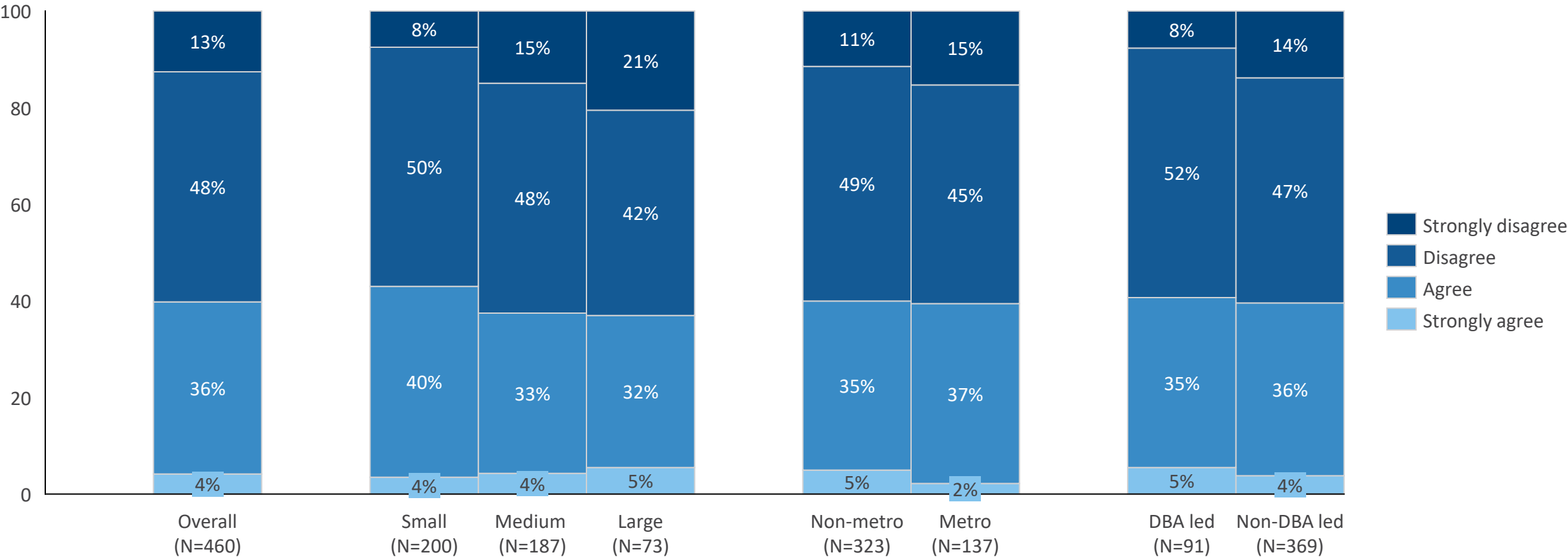
Source: Pay-What-It-Takes India Initiative Survey of Nonprofits 2025 conducted by The Bridgespan Group.

Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2025

Q17: Please share the extent to which you agree or disagree with the following statements based on your organisation’s experience in the past three years (since 2022).

(A) More funders recognise the need for nonprofits to build reserves or corpus.

% of total respondents



Note: Any discrepancies in percentage totals are due to rounding. **Metro organisations** are those with headquarters in Ahmedabad, Bangalore, Chennai, Delhi NCR, Hyderabad, Kolkata, Mumbai, and Pune. **Small organisations** are those with annual budgets less than Rs 1 crore, **medium-scale organisations** are those with annual budgets between Rs 1 to 10 crore and **large organisations** are those with annual budgets over Rs 10 crore. **DBA-led organisations** include those whose leaders belong to the Dalit, Bahujan or Adivasi communities.

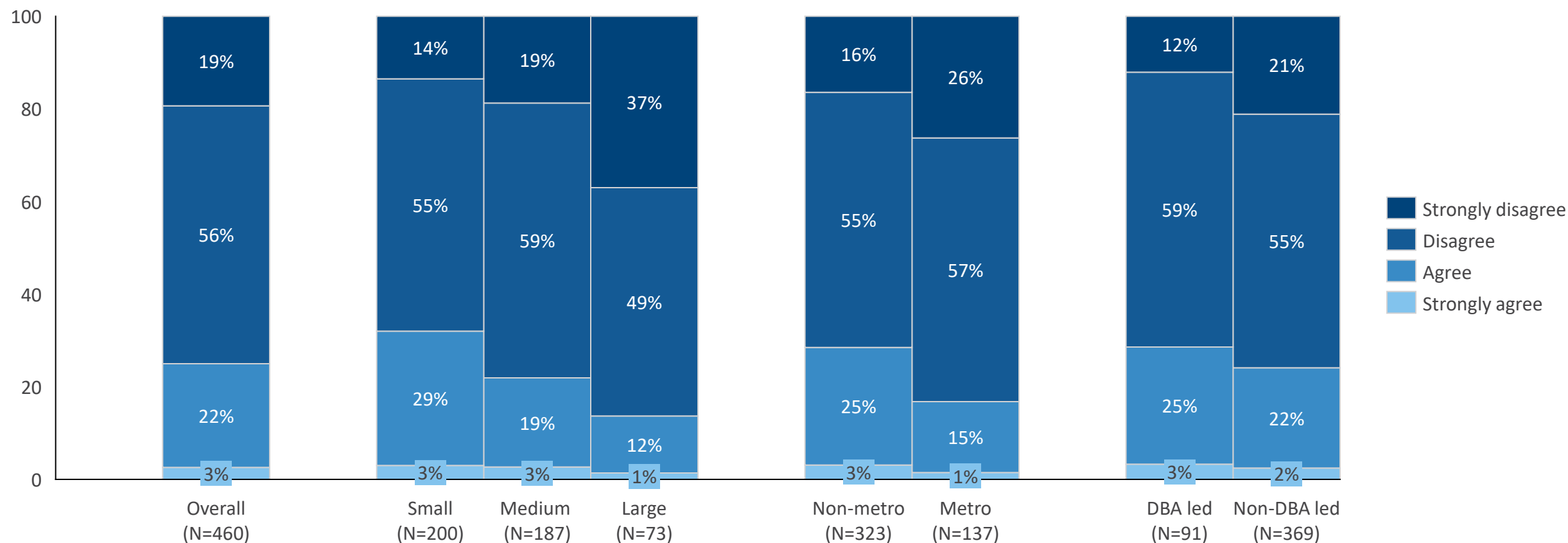
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Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2025

Q17: Please share the extent to which you agree or disagree with the following statements based on your organisation's experience in the past three years (since 2022).

(B) More funders are willing to have conversations on building reserves or corpus.

% of total respondents



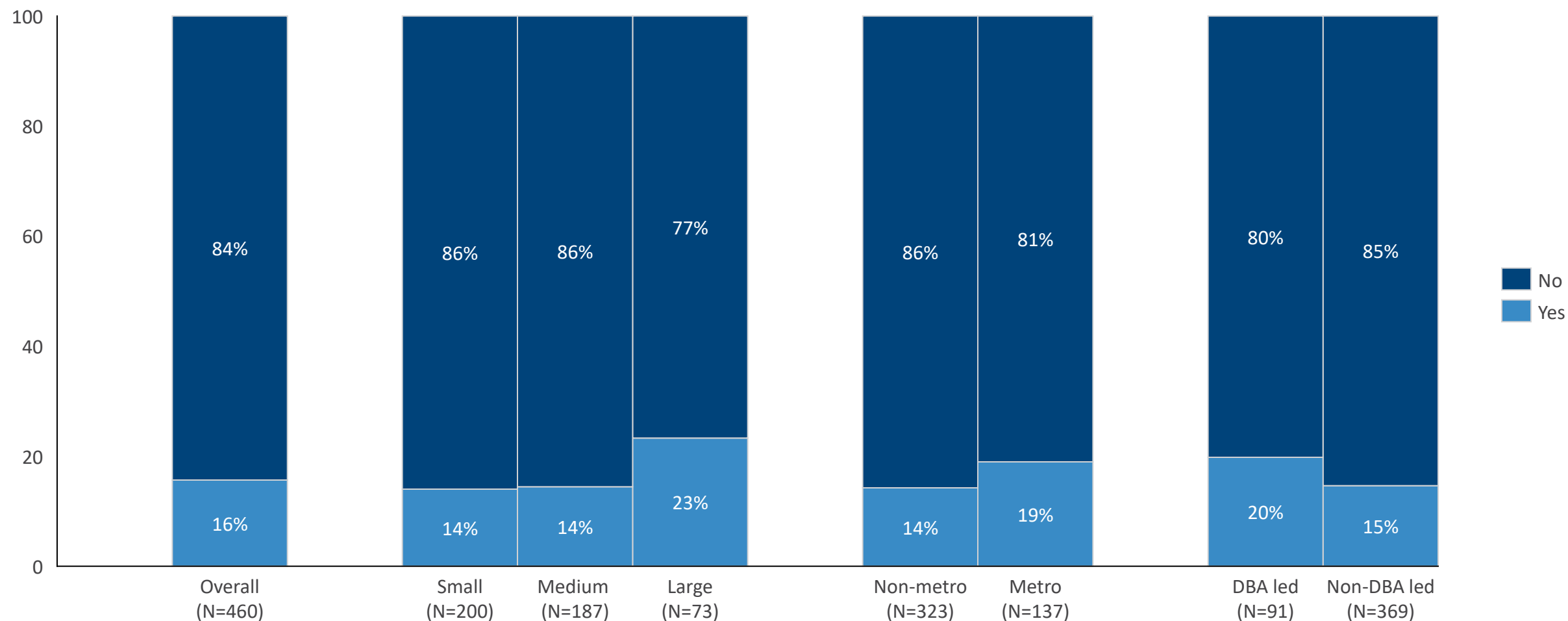
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Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2025

Q18: Have one or more of your funders started contributing to building reserves or corpus over the past three years (since 2022)?

% of total respondents



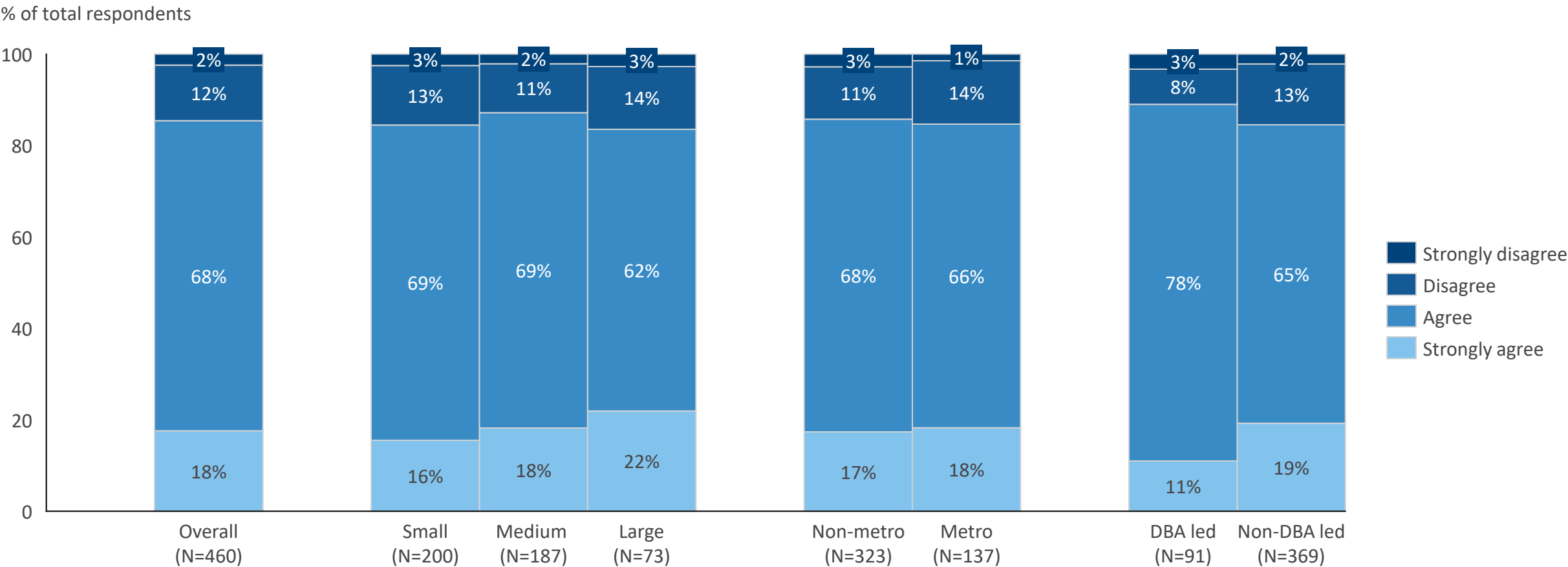
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Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2025

Q19: Please share the extent to which you agree or disagree with the following statements based on your organisation’s experience in the past three years (since 2022).

(A) More funders recognise the need to focus on underserved communities and/or geographies.



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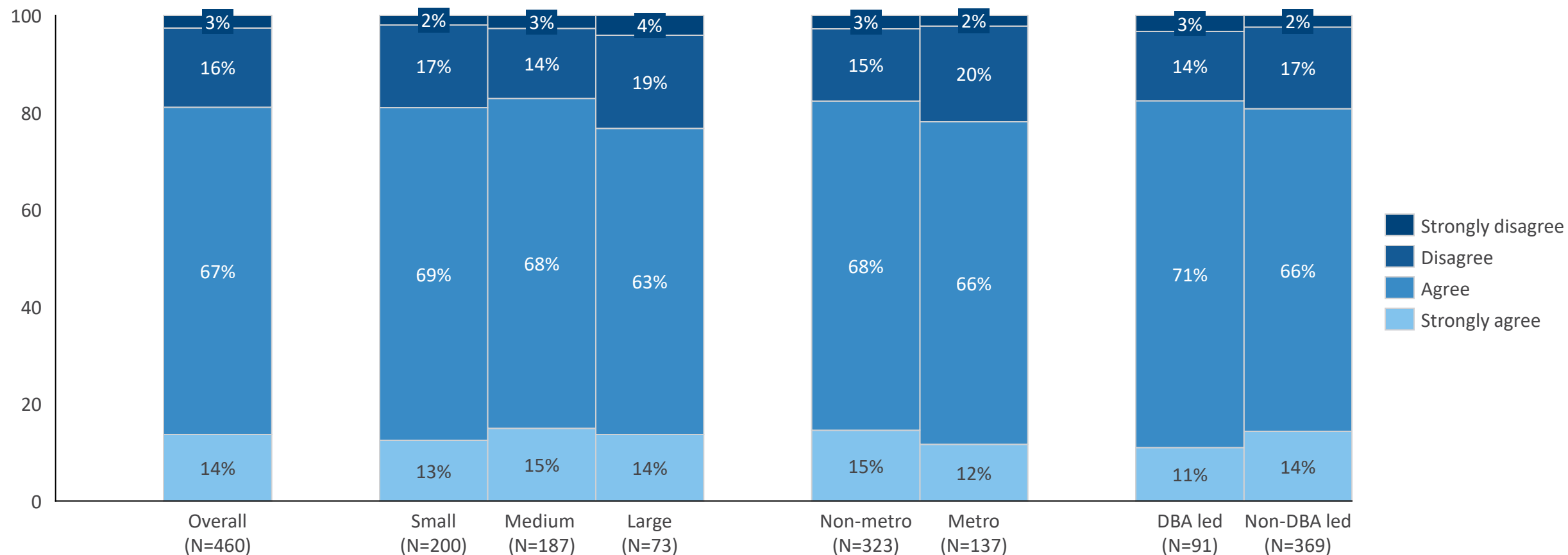
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Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2025

Q19: Please share the extent to which you agree or disagree with the following statements based on your organisation's experience in the past three years (since 2022).

(B) More funders engage in conversations focusing on the needs of underserved communities and/or geographies.

% of total respondents



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Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2025

Q20: What are the top three challenges you face with respect to raising funds for your true-cost needs?

Top challenges emerging from qualitative responses (N=388):

- **Lack of fundraising capacity and challenges in communicating and justifying true cost needs.**

- Nonprofits lack a dedicated fundraising function. Funders often require nonprofits to justify every expense, which is difficult for the team to communicate.
- Many nonprofits struggle in explaining the necessity of their true cost needs. Fear of rejection makes them understate true cost needs in proposals.

- **Lack of trust and empathy in funder-nonprofit relationships.**

- Widespread perception that funders have limited empathy to understand nonprofits' true cost needs. Some funders conflate core-cost needs with inefficiencies or wastage, leading to skepticism and underfunding of some core functions like human resources and finance.

- **Preference for short-term grant cycles and program-focused funding.**

- Most funding comes in the form of short-term grants and focuses only on programmes, with little continuity or commitment beyond one year. This prevents long-term planning or investment in systems.

- **Rigid caps on administrative or overhead costs.**

- Many funders impose a limit on administrative costs (often between 5% to 10%), which does not reflect the actual core-cost needs of nonprofits.

- **Biases preventing certain organisations from raising funding.**

- Perception among organisations working in remote, rural, or low-visibility sectors (like elder care or arts) that funders high visibility geographies and causes. As a result, these organisations often feel or are excluded from mainstream funding opportunities.

Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2025

Q21: What are the top three positive changes that you have observed either in the mindset, funding approach, or funding practices of your funders over the past three years (since 2022)?

Top positive changes emerging from qualitative responses (N=331):

- **Openness to dialogue around true-cost support.**
 - Evident shift in funder mindset as they are more willing to have conversations around nonprofits' true cost needs.
- **Growth in trust-based philanthropy and multiyear partnerships.**
 - Along with a significant increase in multiyear partnerships, nonprofits perceive a rise in funders' willingness to offer flexibility in how funds are allocated (e.g. Rohini Nilekani Philanthropies and the GROW Fund come with minimal reporting requirements and demonstrate trust).
- **Greater recognition of organisational development (OD) needs.**
 - Some funders proactively ask about nonprofits' OD needs and treat OD as an essential need rather than an auxiliary need.
 - Grants are focusing on strengthening internal systems, second-line leadership development (e.g. Paul Hamlyn Foundation), fundraising (e.g. HT Parekh Foundation). and digital transformation, among other needs.
- **Emergence of collaborative funding.**
 - Platforms like Dasra's Rebuild India Fund and AVPN have supported pooled funding and capacity building. These platforms allow nonprofits to access both funding and knowledge.
- **Streamlining and flexibility in grantmaking practices.**
 - Only a few funders have released funds in advance, reduced the number of tranches, started supporting proposals in regional languages and adjusted budget norms to reflect costs in rural or remote areas.

Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2025

Q22: What are some good funding practices that have been implemented by funders to support your true-cost needs?

Good funding practices emerging from qualitative responses (N=267):

- **Providing foundational support to nonprofits.**

- Select funders have supported capital expenses (e.g. laptops, office furniture) or staff welfare costs (e.g. insurance, provident fund) recognising these are foundational requirements.

- **Trust-based philanthropy and simpler reporting.**

- Reporting has been lightened (fewer templates, more narrative learning, annual versus every six months, and advance/timely tranches). Relationships feel more partner-like than vendor-like.

- **Including core-cost support in program budgets.**

- Some funders include salaries of shared human resource, finance, and leadership staff within programme budgets. A few funders provide bridge funding for operations after the official programme period has ended to maintain programme continuity. Some funders (e.g. HT Parekh Foundation, the GROW Fund) also support salaries for critical, nonprogrammatic roles (e.g. fundraising, communications).

- **Flexibility in budget allocations within approved grants.**

- Funders (e.g. Azim Premji Foundation, Bread for the World) allow nonprofits to reallocate budget lines in response to crises without rigid approval processes. Some funders permit deviations in budget utilisation of up to 10–20% without prior approval, acknowledging that implementation realities can shift.

- **Providing mentorship support and supporting learning.**

- Some funders (e.g. SVP India) offer mentoring and capacity-building support in addition to funding. Some funders (e.g. Rainmatter Foundation) support experimentation or organisational learning costs – even when there is no guaranteed impact.

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User guide

2025 nonprofit survey data

2020 nonprofit survey data

The 2020 nonprofit survey received 388 responses from a diverse set of nonprofits from across the country

Key segmentation variables:

	Organisation size (annual budget, Rs)	No. of responses	%
Small	Less than 15 lakhs	128	33%
	15 lakhs to 99 lakhs	53	14%
Medium	1 crore to 4.99 crores	99	26%
	5 crores to 9.99 crores	42	11%
Large	10 crores to 24.99 crores	35	9%
	25 crores to 49.99 crores	18	5%
	50 crores or more	13	3%

Geographic location of headquarter	No. of responses	%
Metro*	245	63%
Non-metro	143	37%

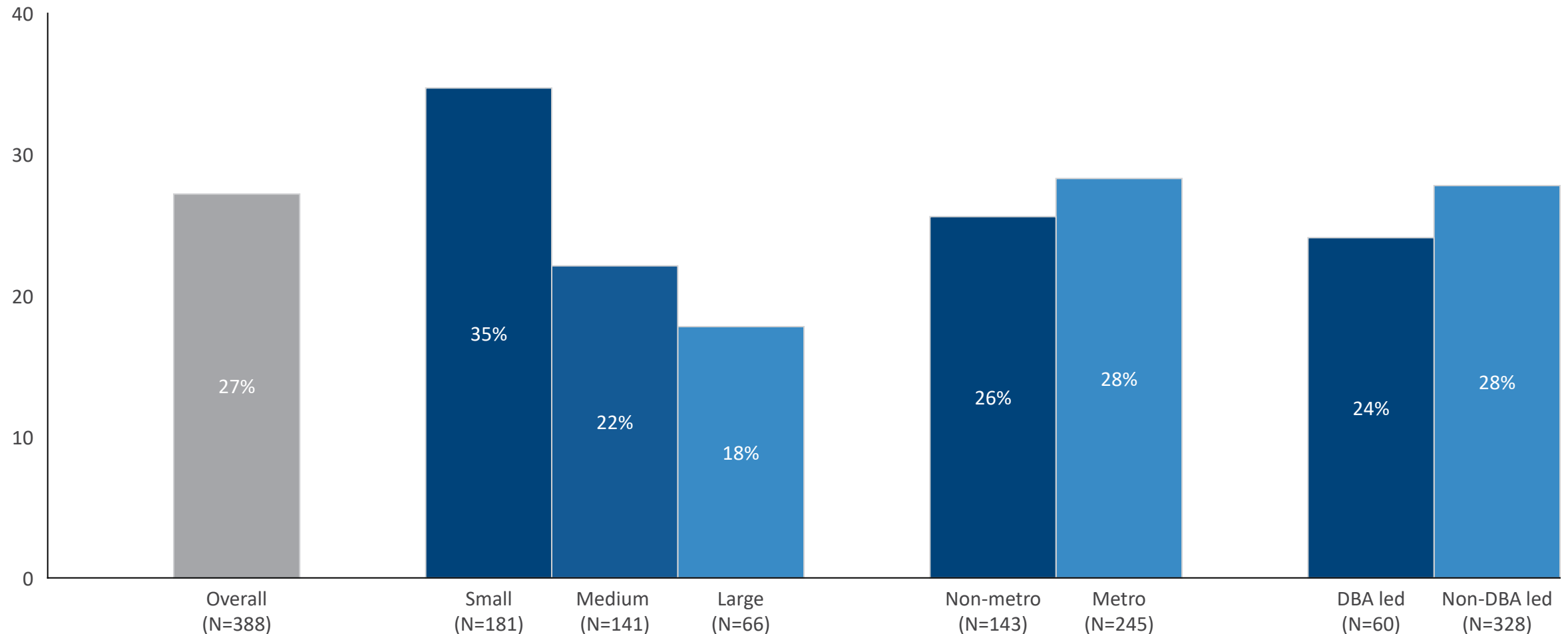
Leadership composition^	No. of responses	%
Women	192	49%
Dalit, Bahujan, Adivasi (DBA) communities	60	15%
Religious minorities	46	12%
Rather not say	32	8%
Persons with disabilities	30	8%
LGBTQ+	7	2%
None of these	129	33%

Note: Analysis conducted on the following slides is across three parameters (i) organisation size – categorized as small, medium, or large based on annual budget (ii) headquarters location – whether the organisation is metro-based or non-metro-based, and (iii) leadership composition – whether the organisation is DBA-led or non-DBA-led

Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2020

Q1: Approximately what percentage of your organisation's total annual expenditure/payments is met from unrestricted/core funding?

% of organisation's total annual expenditure/payments (average)



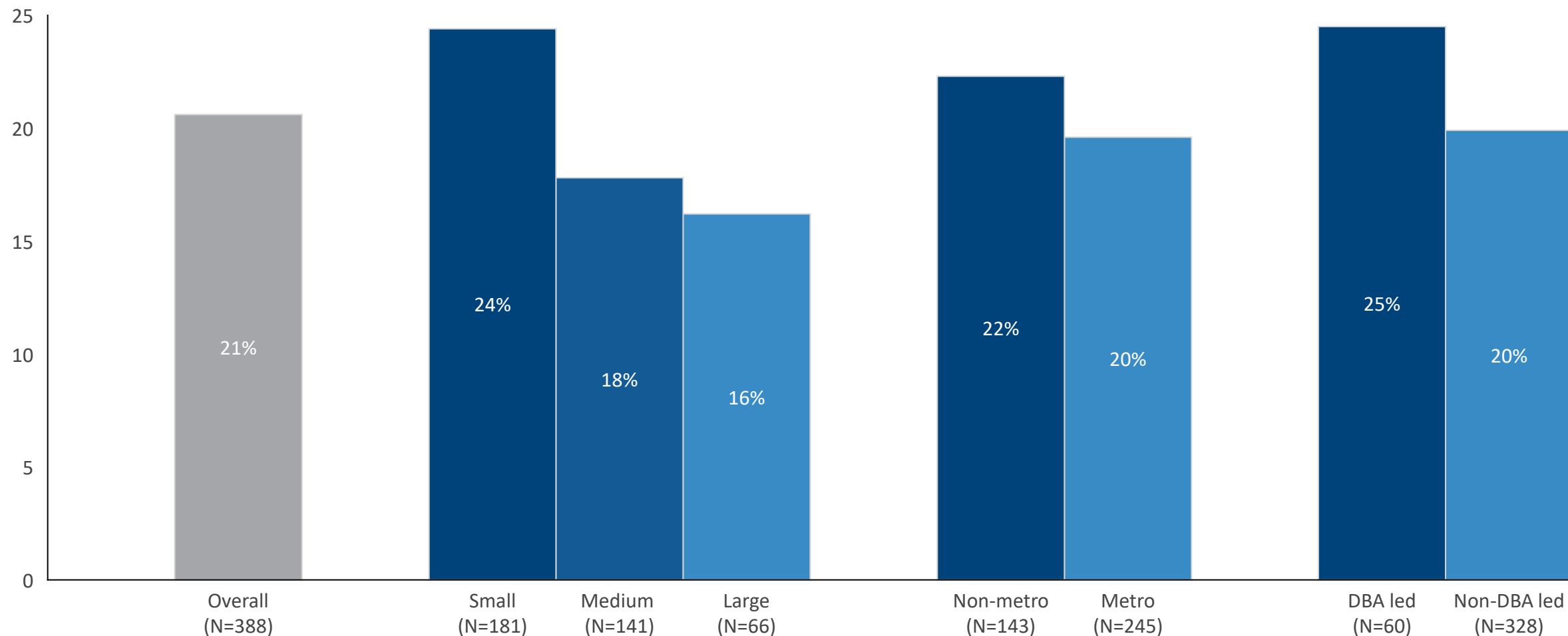
Note: Any discrepancies in percentage totals are due to rounding. **Metro organisations** are those with headquarters in Ahmedabad, Bangalore, Chennai, Delhi NCR, Hyderabad, Kolkata, Mumbai, and Pune. **Small organisations** are those with annual budgets less than Rs 1 crore, **medium-scale organisations** are those with annual budgets between Rs 1 to 10 crore and **large organisations** are those with annual budgets over Rs 10 crore. **DBA-led organisations** include those whose leaders belong to the Dalit, Bahujan or Adivasi communities.

Source: Pay-What-It-Takes India Initiative Survey of Nonprofits 2020 conducted by The Bridgespan Group.

Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2020

Q2: Approximately what percentage of your organisation's total costs are nonprogramme costs?

% of percentage of organisation's total costs (average)

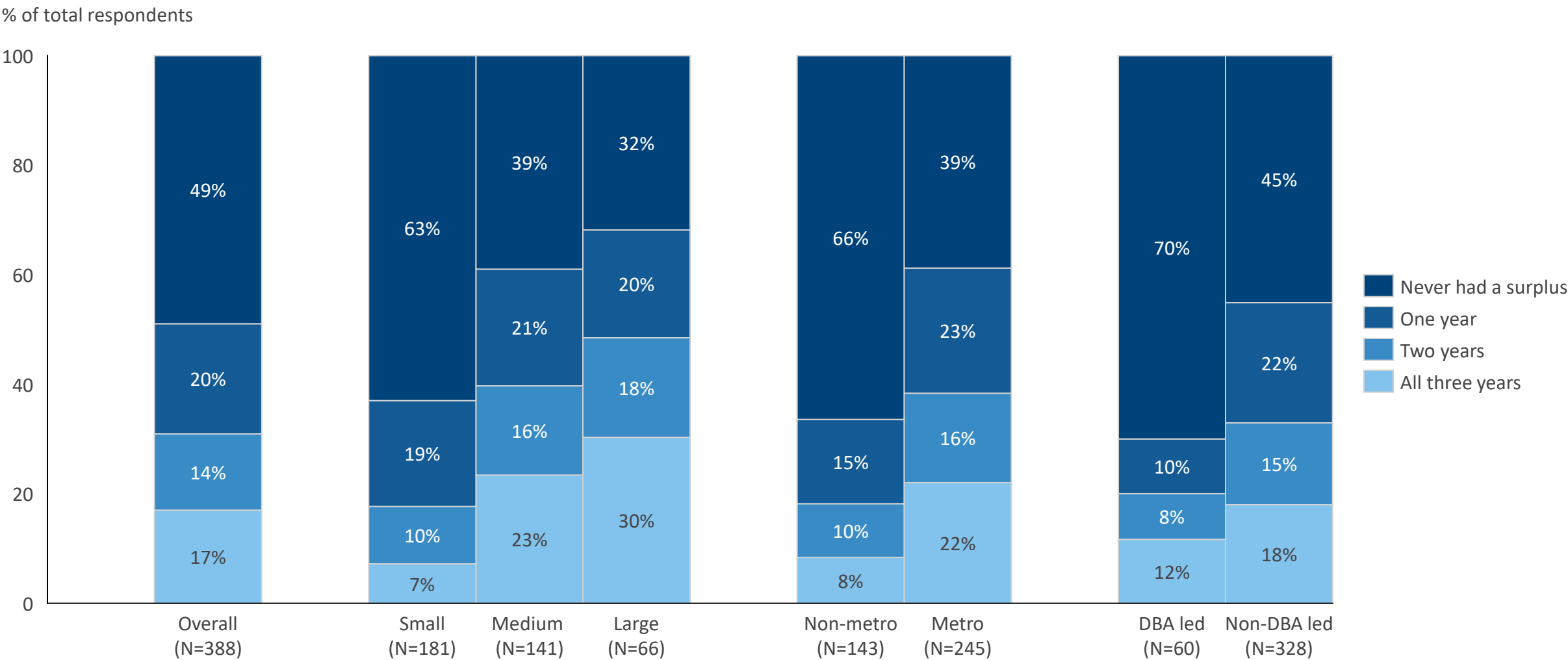


Note: Any discrepancies in percentage totals are due to rounding. For the purpose of clarity, the 2020 survey used the term nonprogramme costs instead of indirect costs. These are defined as shared administrative or support function expenses, not tied to a specific programme, e.g. salaries of nonprogramme employees, rent and electricity for central office, central database management costs, etc. **Metro organisations** are those with headquarters in Ahmedabad, Bangalore, Chennai, Delhi NCR, Hyderabad, Kolkata, Mumbai, and Pune. **Small organisations** are those with annual budgets less than Rs 1 crore, **medium-scale organisations** are those with annual budgets between Rs 1 to 10 crore and **large organisations** are those with annual budgets over Rs 10 crore. **DBA-led organisations** include those whose leaders belong to the Dalit, Bahujan or Adivasi communities.

Source: Pay-What-It-Takes India Initiative Survey of Nonprofits 2020 conducted by The Bridgespan Group.

Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2020

Q3: In the last three years, how many times did your organisation have an operating surplus at the end of the year?



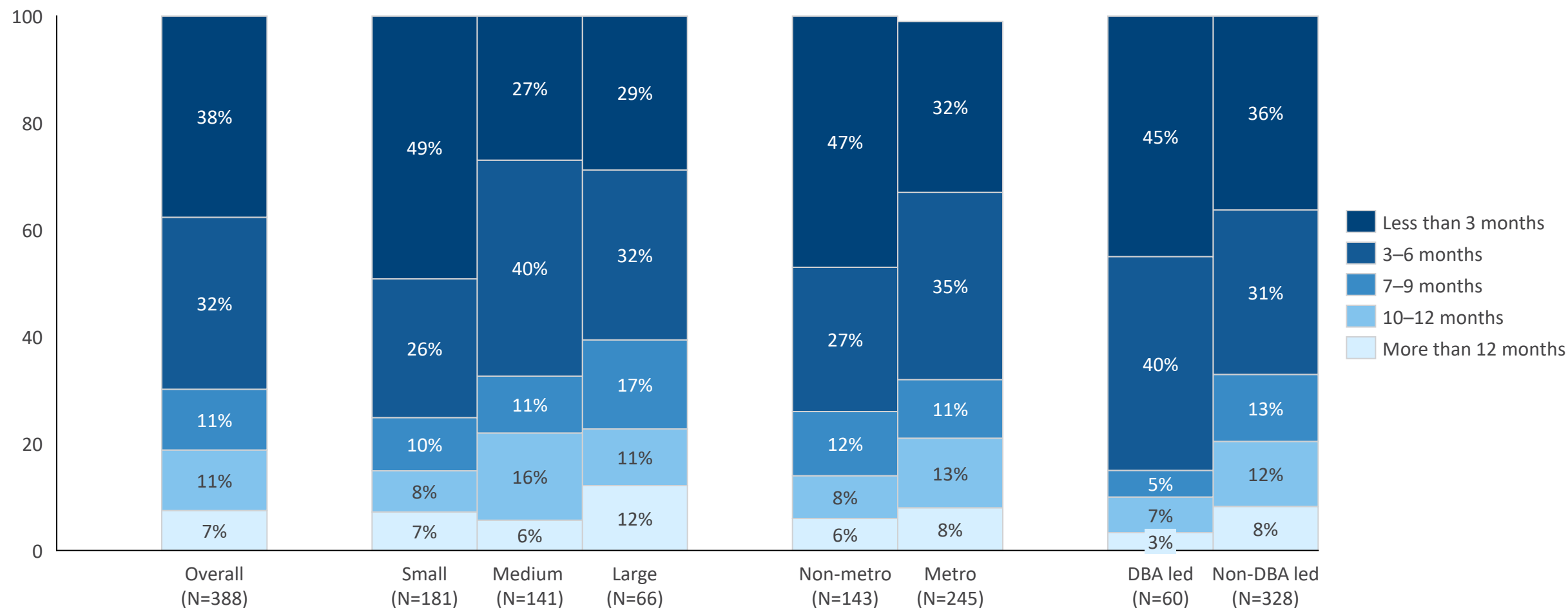
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Source: Pay-What-It-Takes India Initiative Survey of Nonprofits 2020 conducted by The Bridgespan Group.

This question was also asked in 2025. [Click here to view the data](#)

Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2020

Q4: Approximately how many months of cash reserves were you able to maintain pre-COVID?

% of total respondents

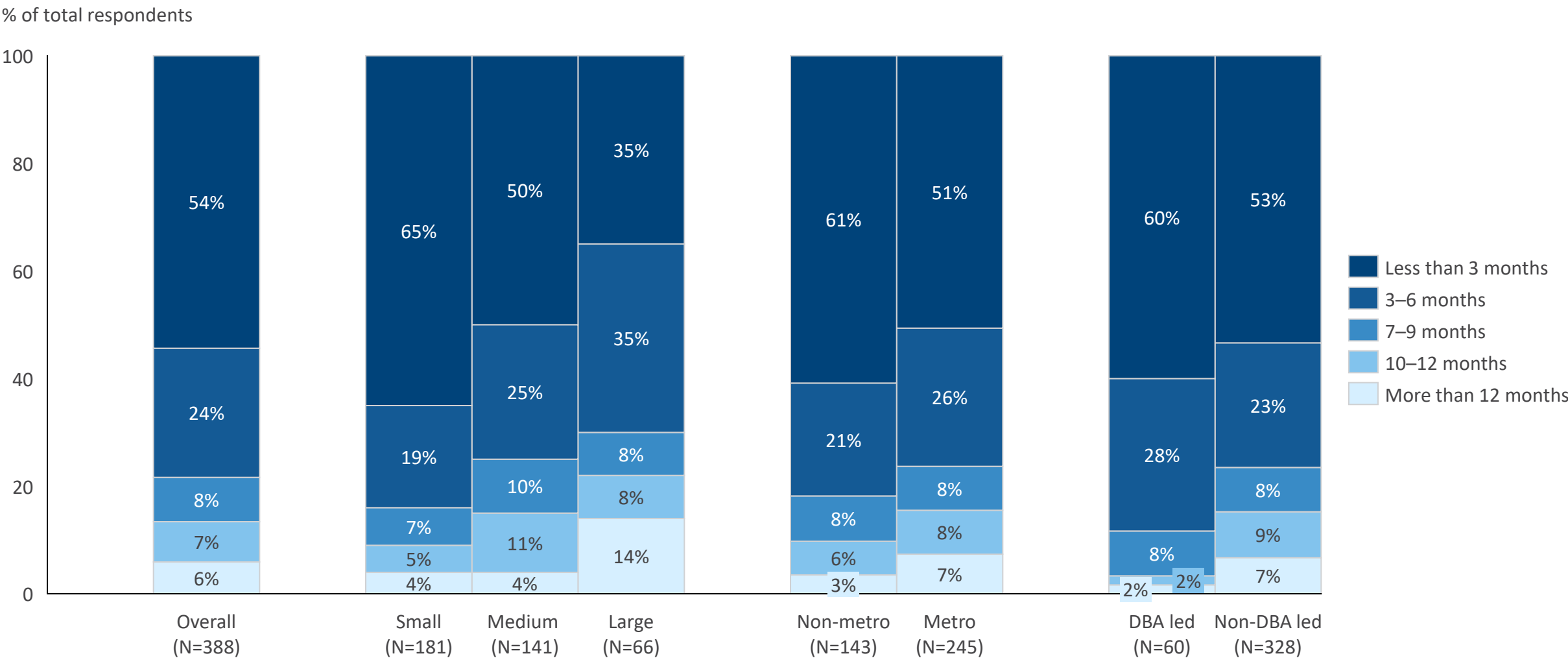


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Source: Pay-What-It-Takes India Initiative Survey of Nonprofits 2020 conducted by The Bridgespan Group.

Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2020

Q5: Currently, how many months of cash reserves do you have?



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Source: Pay-What-It-Takes India Initiative Survey of Nonprofits 2020 conducted by The Bridgespan Group.

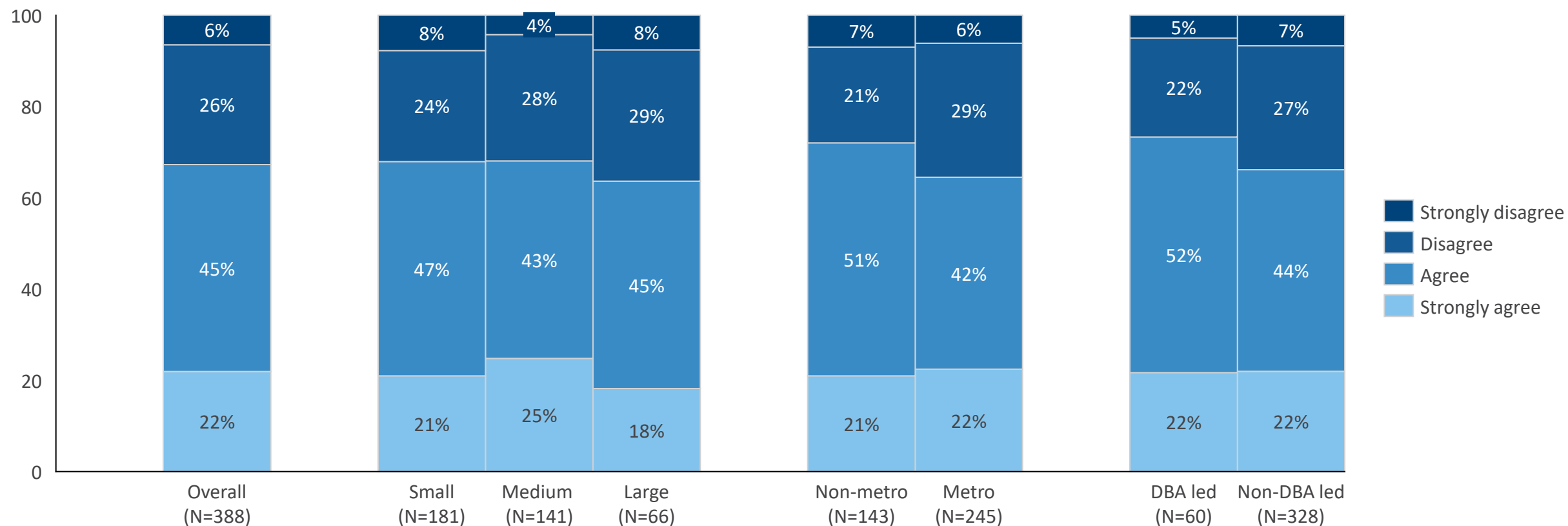
This question was also asked in 2025. [Click here to view the data](#)

Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2020

Q6: Please share the extent to which you agree with the following statements.

(A) Most of our funders do not pay their fair or proportionate share of nonprogramme costs.

% of total respondents



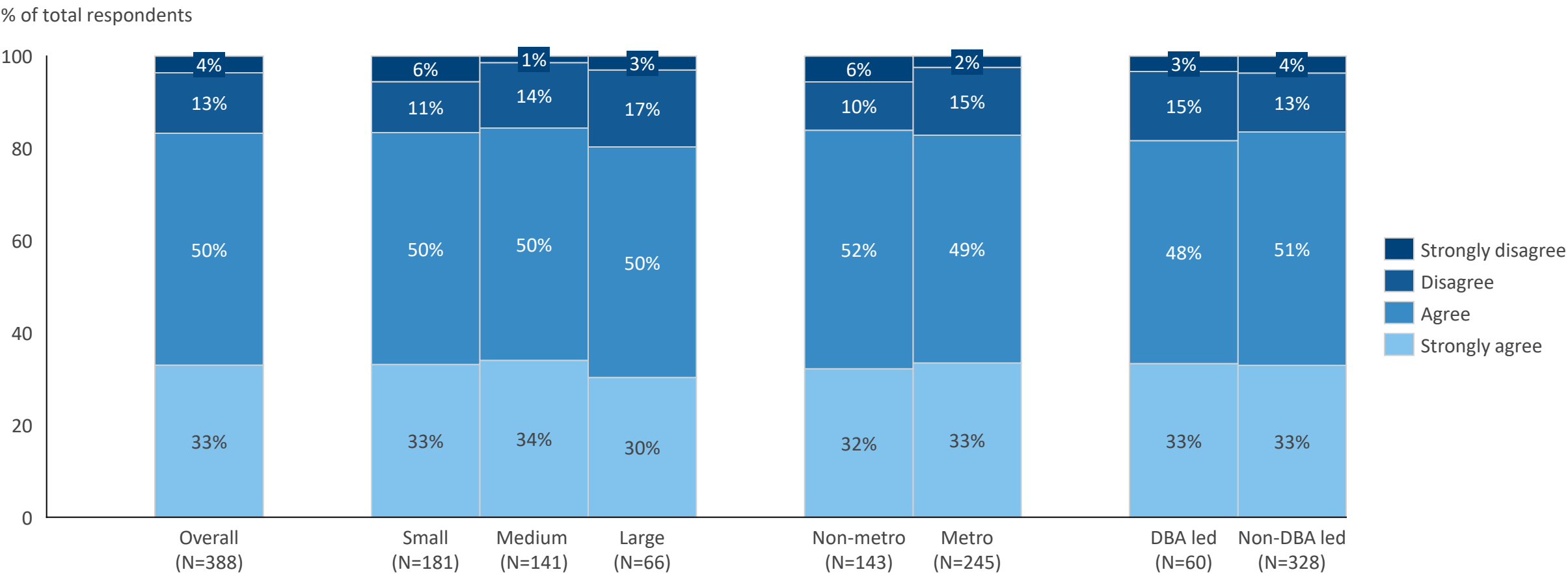
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Source: Pay-What-It-Takes India Initiative Survey of Nonprofits 2020 conducted by The Bridgespan Group.

Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2020

Q6: Please share the extent to which you agree with the following statements.

(B) Ensuring coverage of nonprogramme costs is a challenge.



Note: Any discrepancies in percentage totals are due to rounding. For the purpose of clarity, the 2020 survey used the term nonprogramme costs instead of indirect costs. These are defined as shared administrative or support function expenses, not tied to a specific programme, e.g. salaries of nonprogramme employees, rent and electricity for central office, central database management costs, etc. **Metro organisations** are those with headquarters in Ahmedabad, Bangalore, Chennai, Delhi NCR, Hyderabad, Kolkata, Mumbai, and Pune. **Small organisations** are those with annual budgets less than Rs 1 crore, **medium-scale organisations** are those with annual budgets between Rs 1 to 10 crore and **large organisations** are those with annual budgets over Rs 10 crore. **DBA-led organisations** include those whose leaders belong to the Dalit, Bahujan or Adivasi communities.

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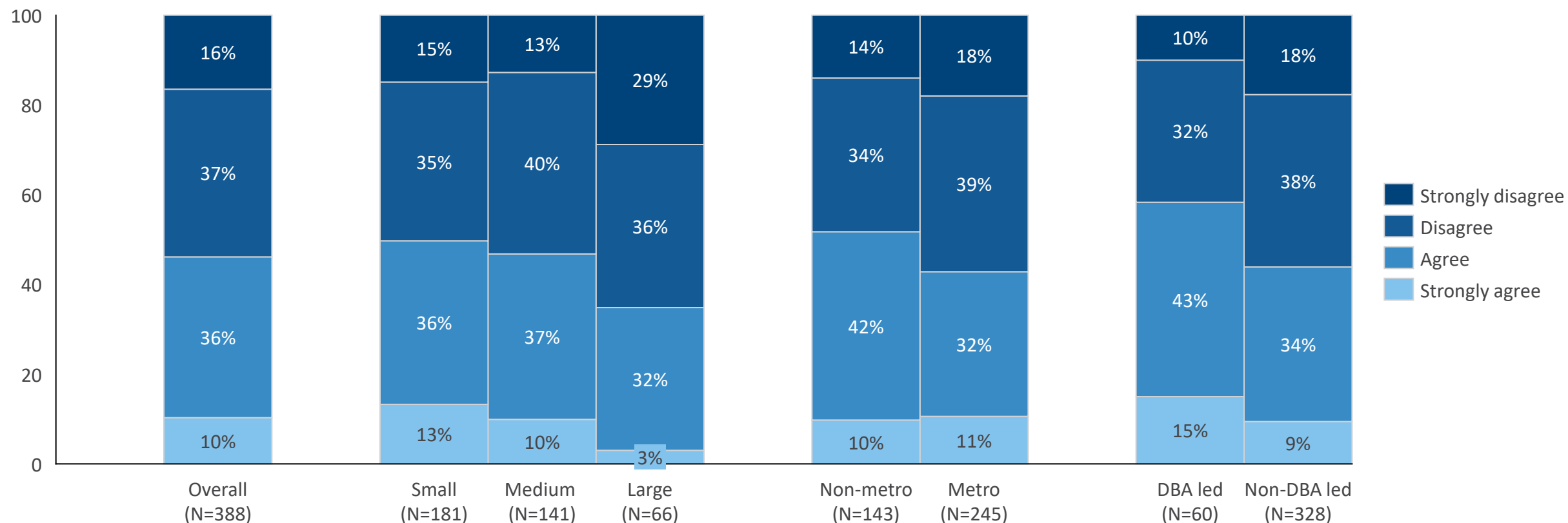
This question was also asked in 2025. Click here to view the data

Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2020

Q6: Please share the extent to which you agree with the following statements.

(C) We have to under-report nonprogrammatic costs to secure funding.

% of total respondents



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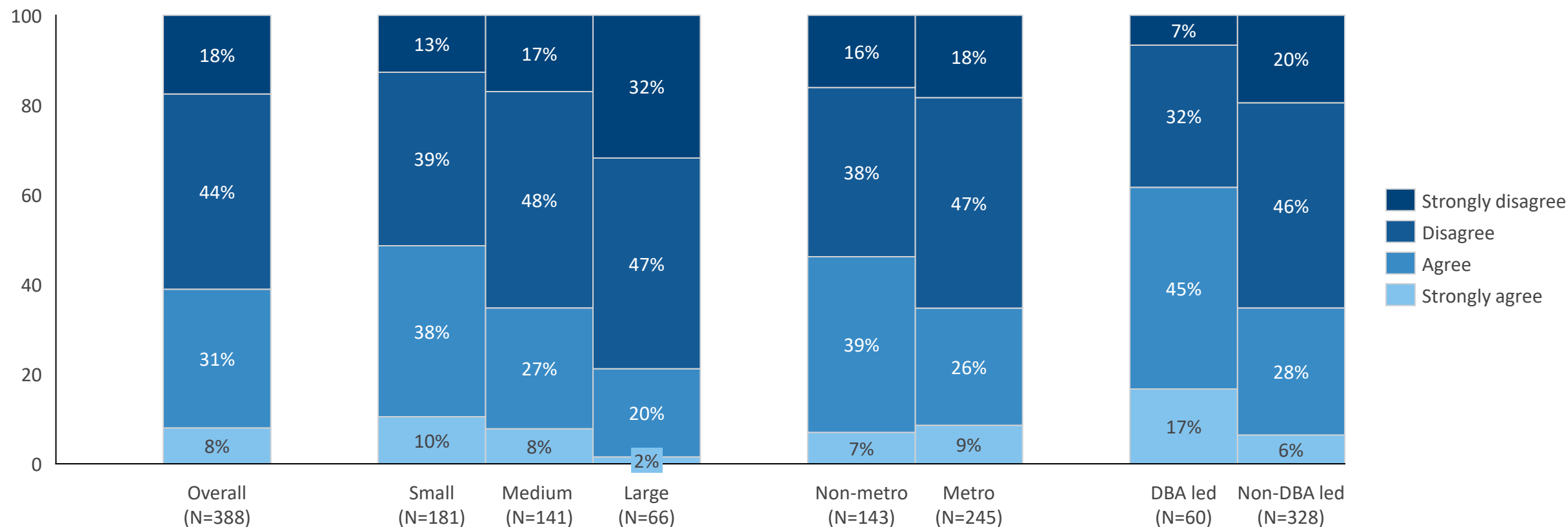
Source: Pay-What-It-Takes India Initiative Survey of Nonprofits 2020 conducted by The Bridgespan Group.

Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2020

Q6: Please share the extent to which you agree with the following statements.

(D) We don't feel comfortable sharing our full nonprogramme cost needs with our funders.

% of total respondents



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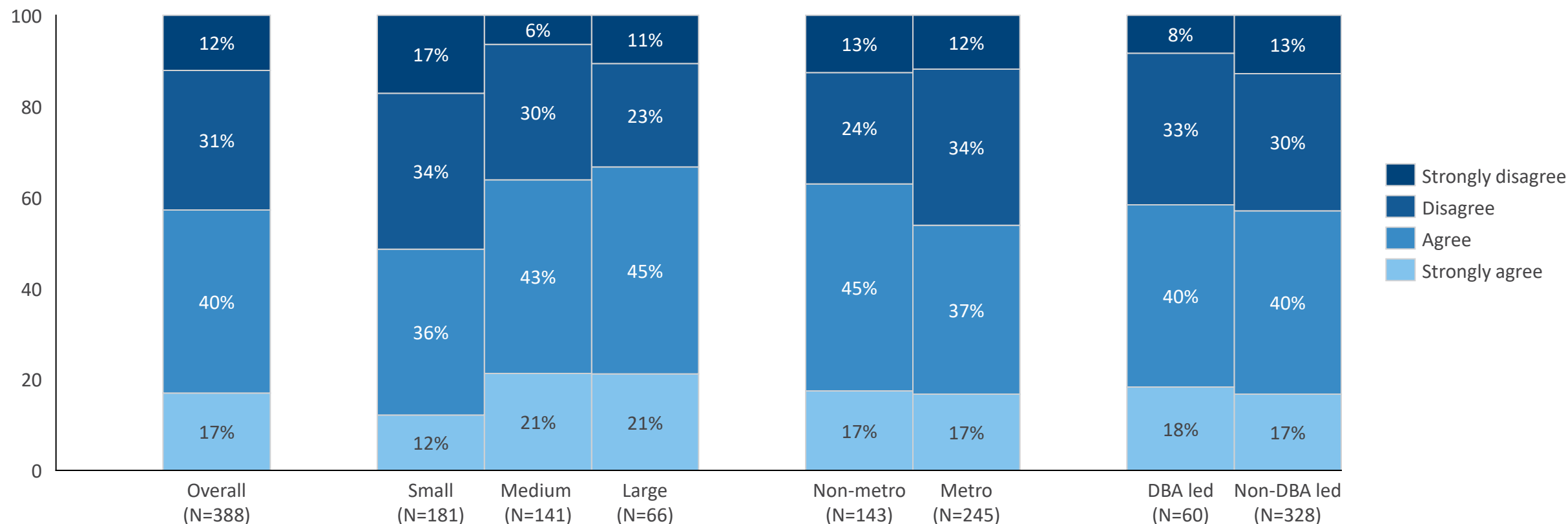
Source: Pay-What-It-Takes India Initiative Survey of Nonprofits 2020 conducted by The Bridgespan Group.

Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2020

Q6: Please share the extent to which you agree with the following statements.

(E) In the past three years, more than one funder has asked us to reduce nonprogramme costs at proposal stage.

% of total respondents



Note: Any discrepancies in percentage totals are due to rounding. For the purpose of clarity, the 2020 survey used the term nonprogramme costs instead of indirect costs. These are defined as shared administrative or support function expenses, not tied to a specific programme, e.g. salaries of nonprogramme employees, rent and electricity for central office, central database management costs, etc. **Metro organisations** are those with headquarters in Ahmedabad, Bangalore, Chennai, Delhi NCR, Hyderabad, Kolkata, Mumbai, and Pune. **Small organisations** are those with annual budgets less than Rs 1 crore, **medium-scale organisations** are those with annual budgets between Rs 1 to 10 crore and **large organisations** are those with annual budgets over Rs 10 crore. **DBA-led organisations** include those whose leaders belong to the Dalit, Bahujan or Adivasi communities.

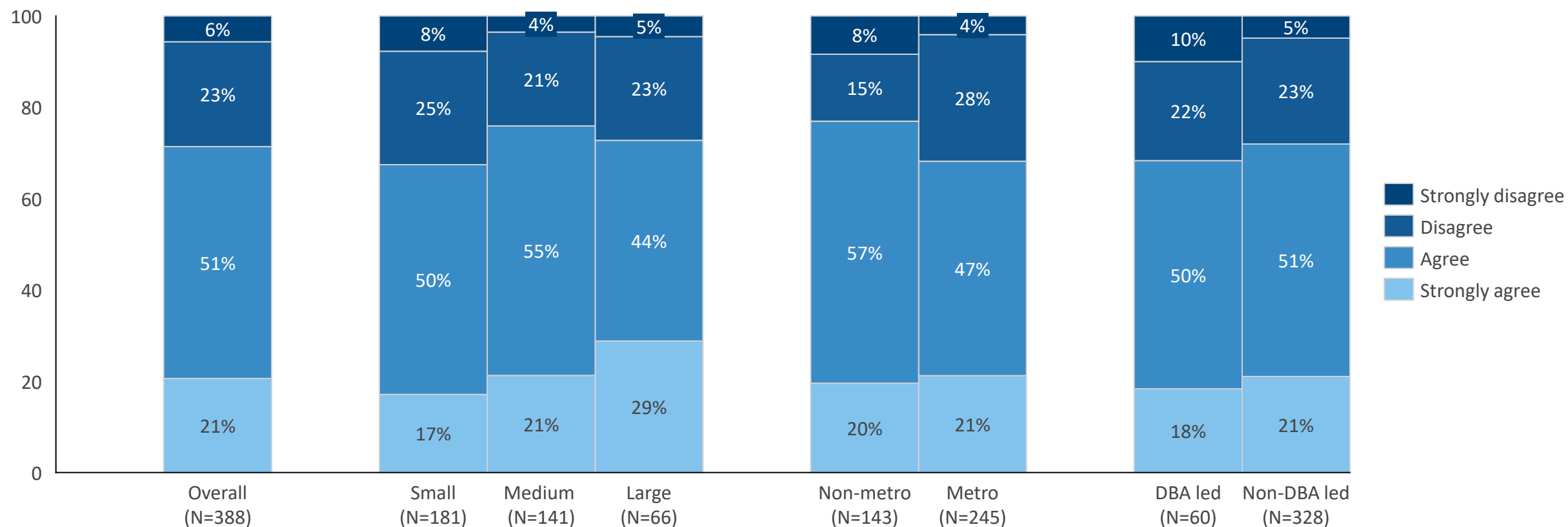
Source: Pay-What-It-Takes India Initiative Survey of Nonprofits 2020 conducted by The Bridgespan Group.

Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2020

Q6: Please share the extent to which you agree with the following statements.

(F) Significant effort goes into adjusting programme budgets to funder policies (e.g. different cost structures have to be adopted for similar programmes based on the type of funder).

% of total respondents



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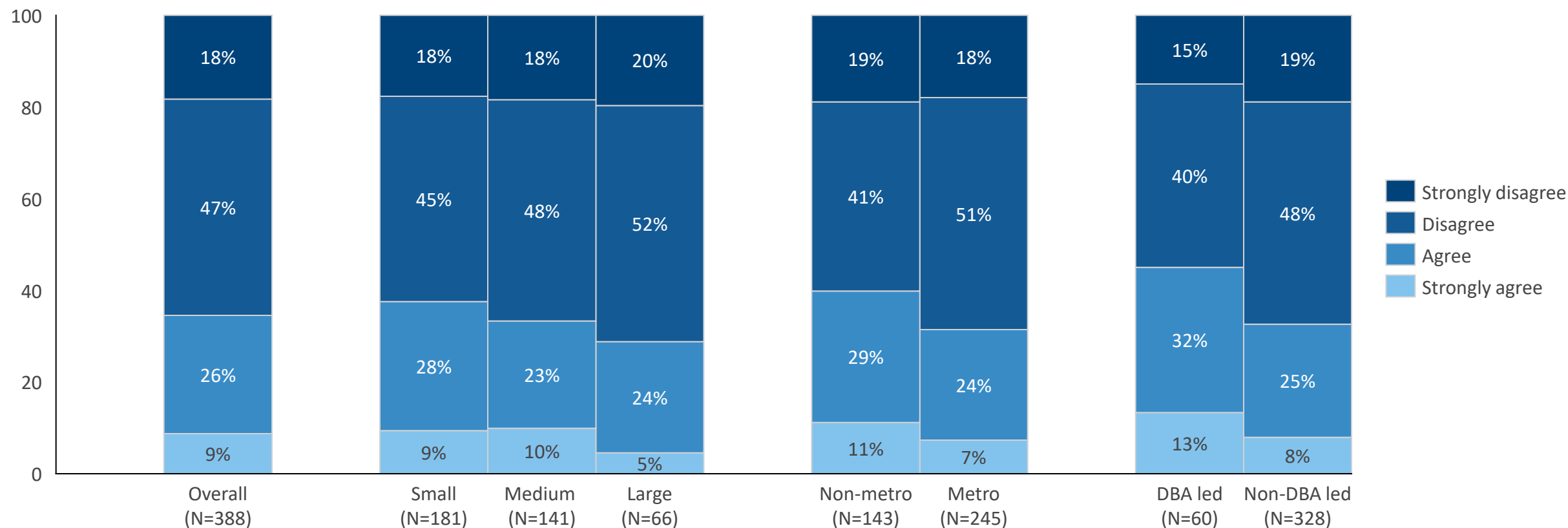
Source: Pay-What-It-Takes India Initiative Survey of Nonprofits 2020 conducted by The Bridgespan Group.

Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2020

Q6: Please share the extent to which you agree with the following statements.

(G) We feel key programme funders lack trust in our ability to operate and spend in nonprogramme areas.

% of total respondents



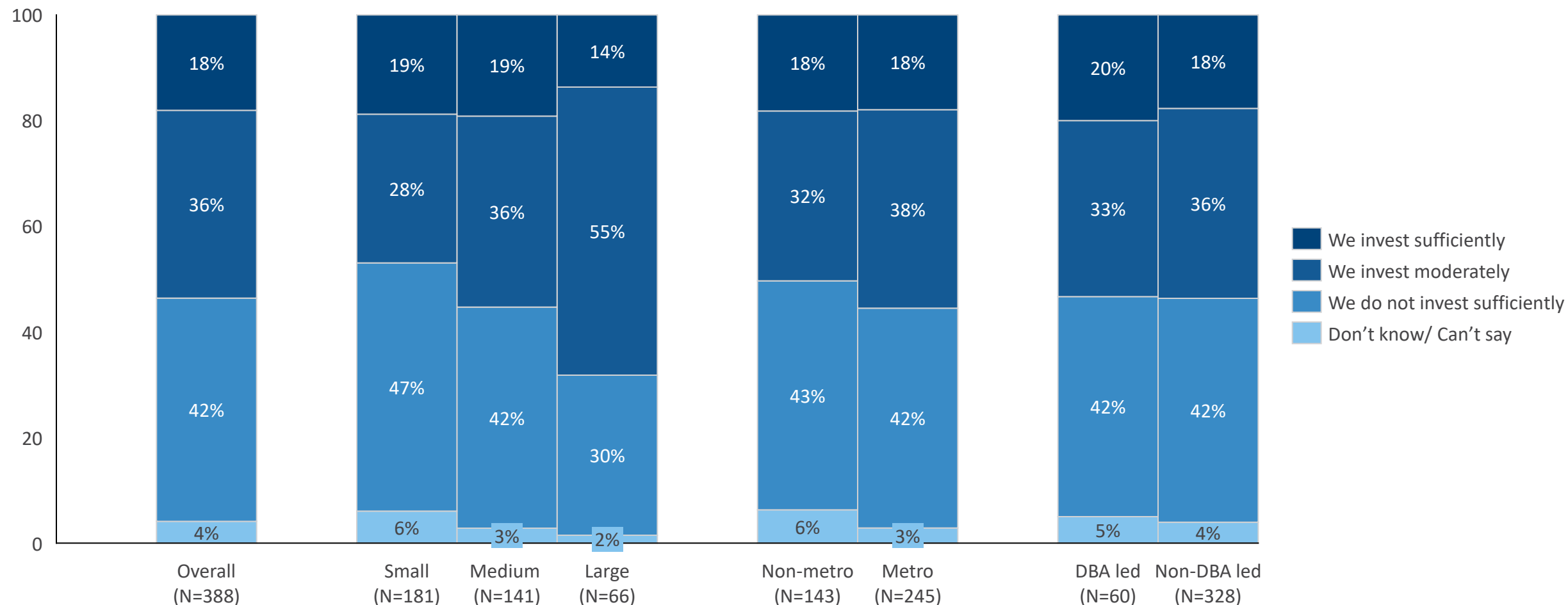
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Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2020

Q7: How would you describe your organisation's investing in 'organisation development' (OD)?

% of total respondents



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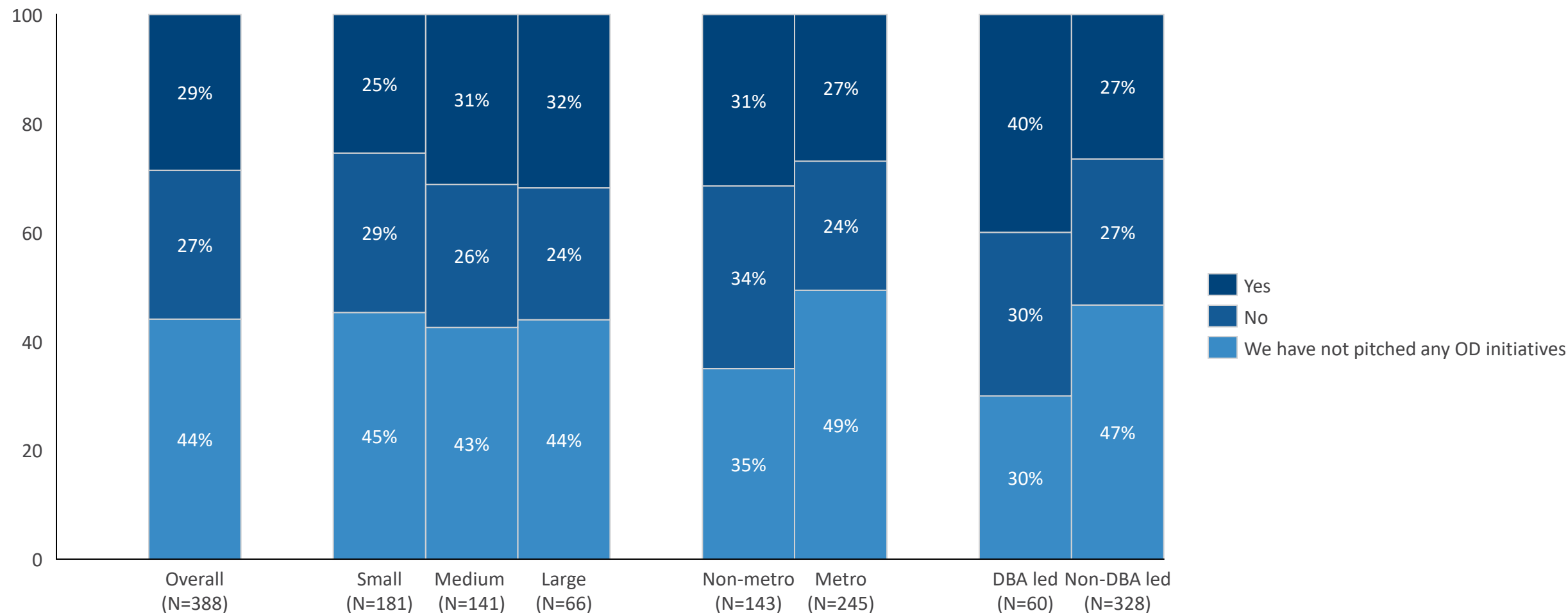
Source: Pay-What-It-Takes India Initiative Survey of Nonprofits 2020 conducted by The Bridgespan Group.

This question was also asked in 2025. [Click here to view the data](#)

Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2020

Q8: In the past three years, has any programme funder refused to fund your planned OD initiative?

% of total respondents



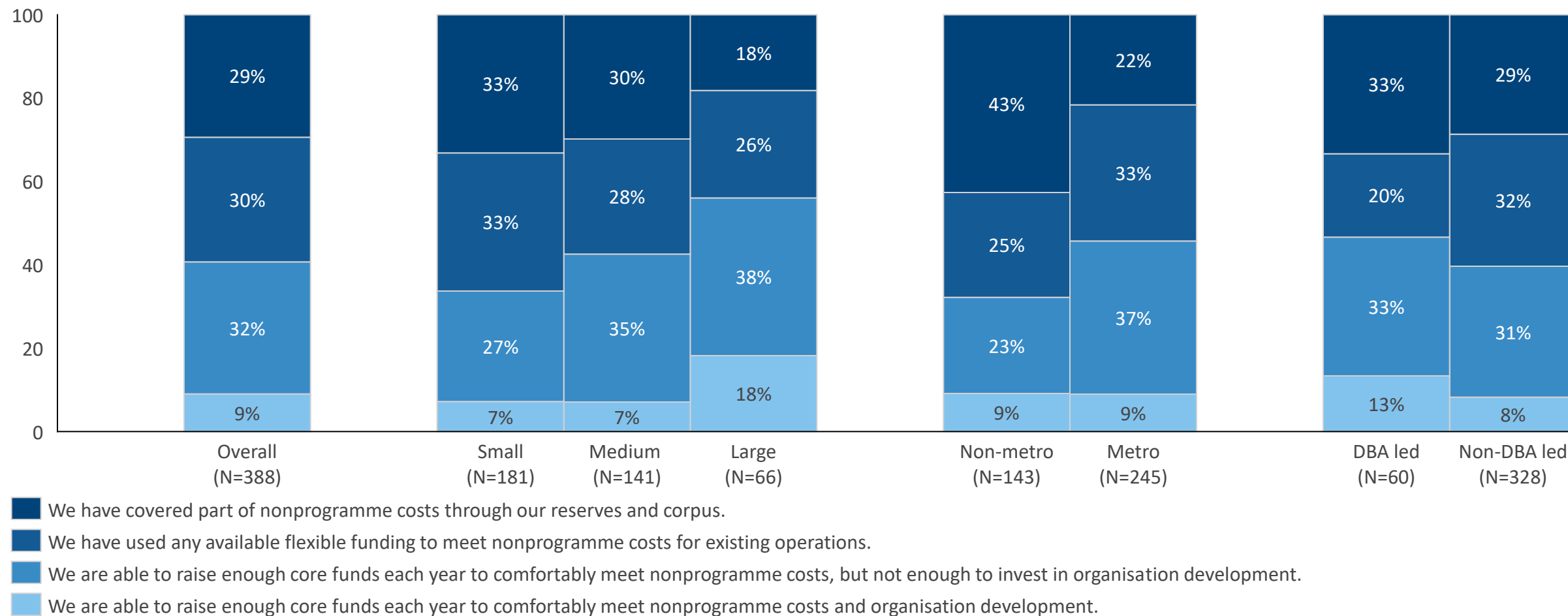
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Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2020

Q9: Please select the statement that best suits your organisation's position, based on your operations in the last three years.

% of total respondents



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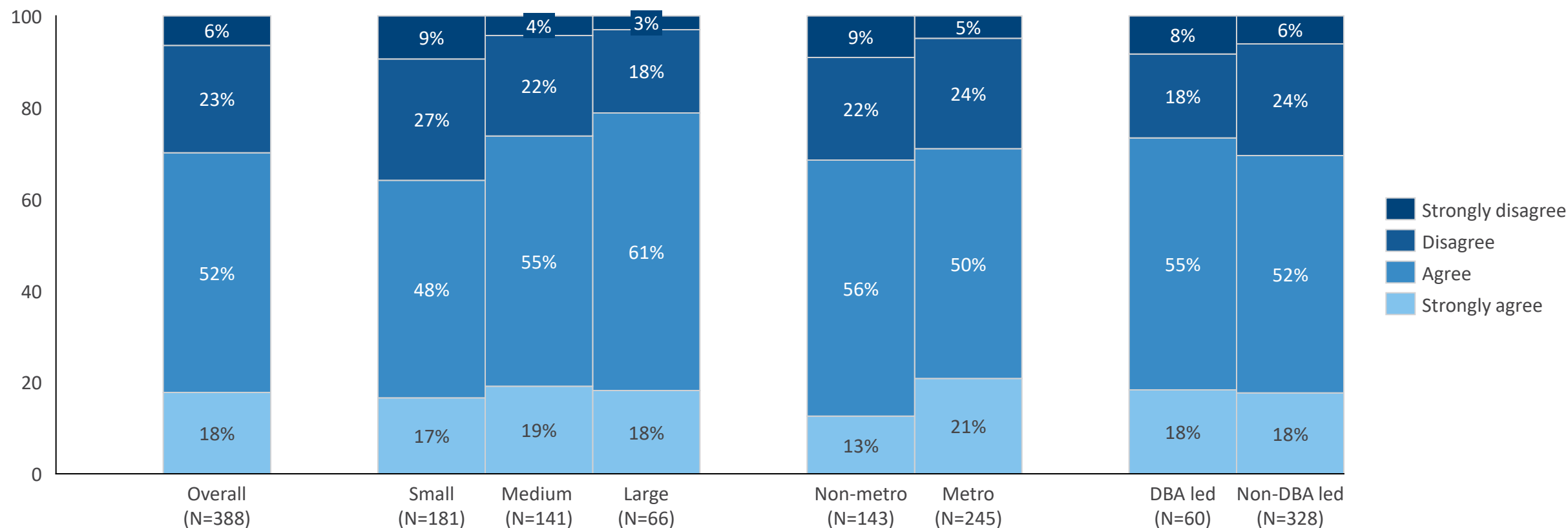
Source: Pay-What-It-Takes India Initiative Survey of Nonprofits 2020 conducted by The Bridgespan Group.

Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2020

Q10: Please share the extent to which you agree with the following based on your organisation's operations in the last three years.

(A) Most of our funders do not financially support our investments in organisational development.

% of total respondents



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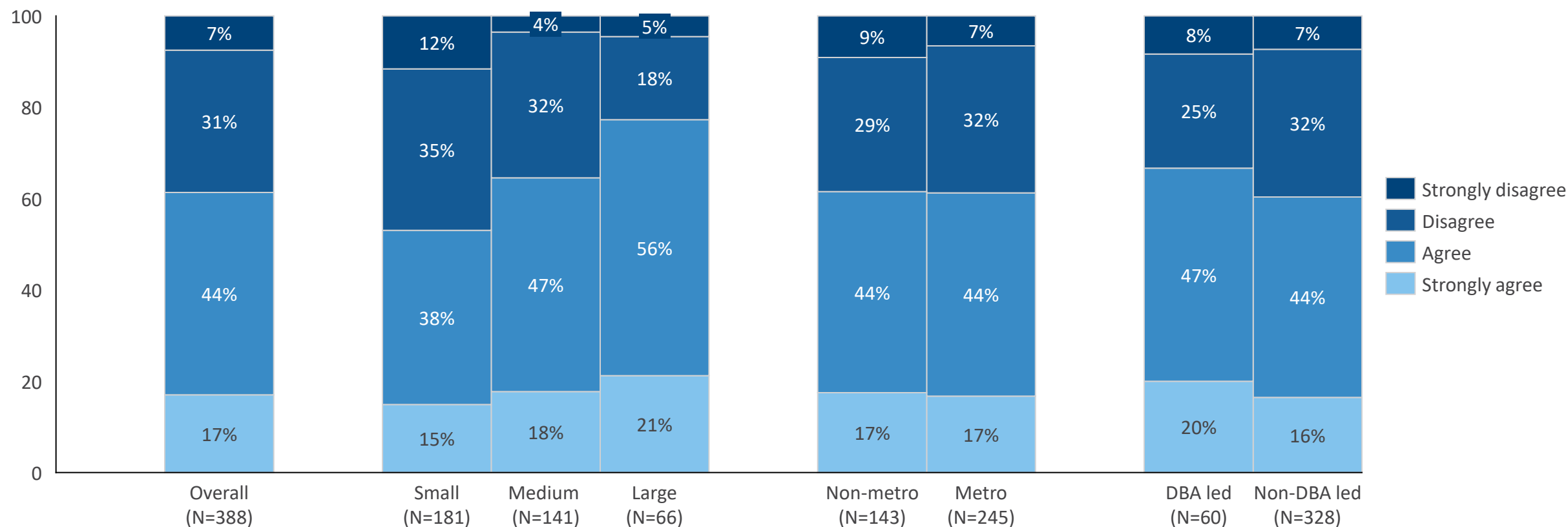
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Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2020

Q10: Please share the extent to which you agree with the following based on your organisation's operations in the last three years.

(B) More than one funder has asked us to prioritise scaling programme outcomes over investing in OD.

% of total respondents



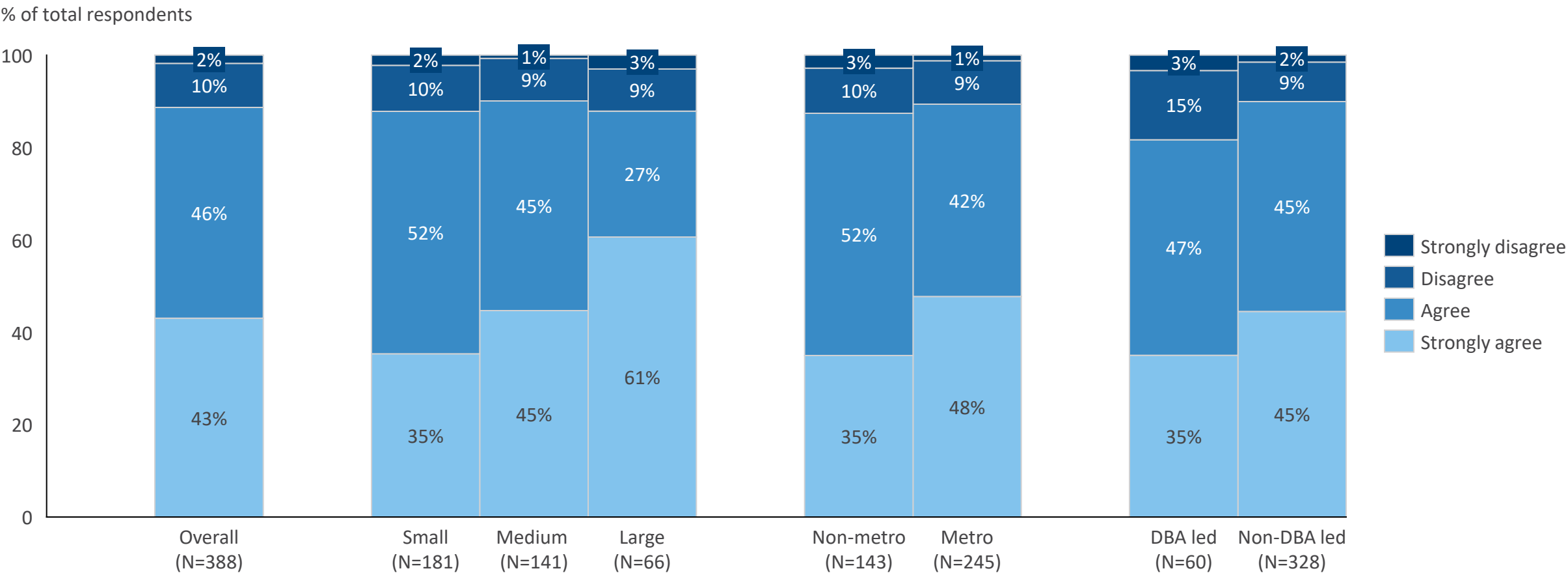
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Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2020

Q10: Please share the extent to which you agree with the following based on your organisation's operations in the last three years.

(C) It takes more time and resources to raise funds for organisational development as compared to programmes.



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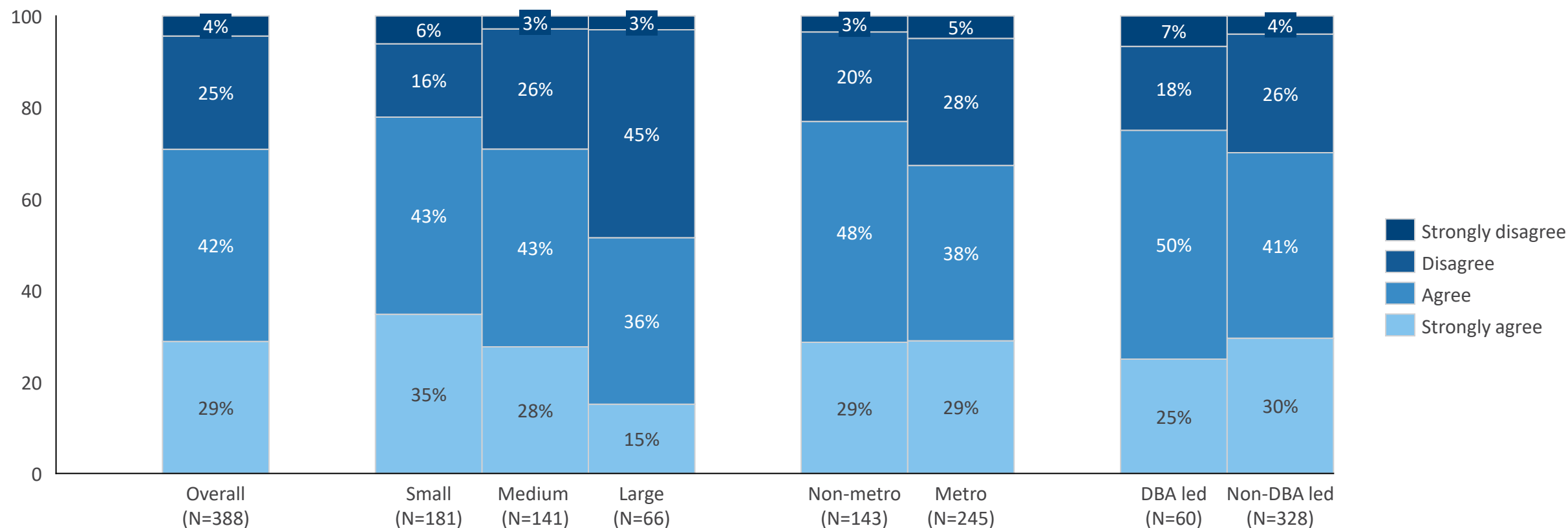
This question was also asked in 2025. Click here to view the data

Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2020

Q11: Please share the extent to which you agree with the following based on your organisation's operations in the last three years.

(A) Our organisation was unable to hire for a key leadership position due to funding constraints.

% of total respondents



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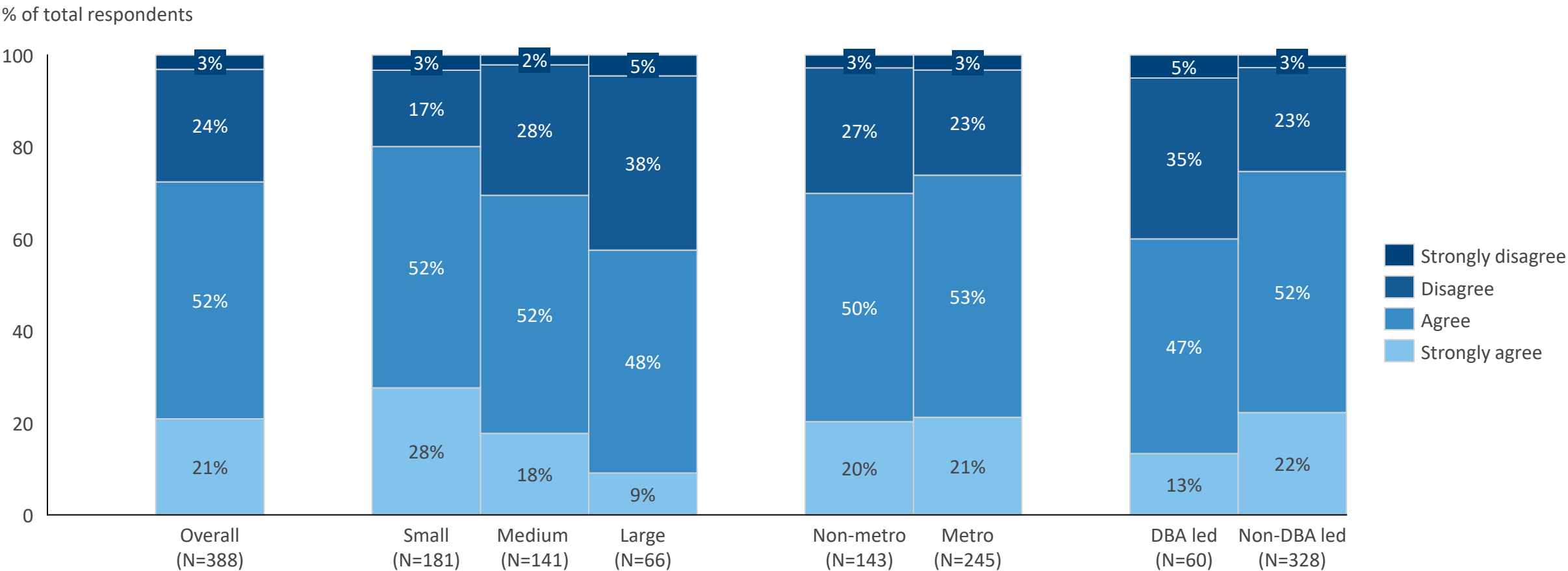
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Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2020

Q11: Please share the extent to which you agree with the following based on your organisation's operations in the last three years.

(B) Our organisation has been unable to make a key organisational development investment required to deliver better outcomes/impact.



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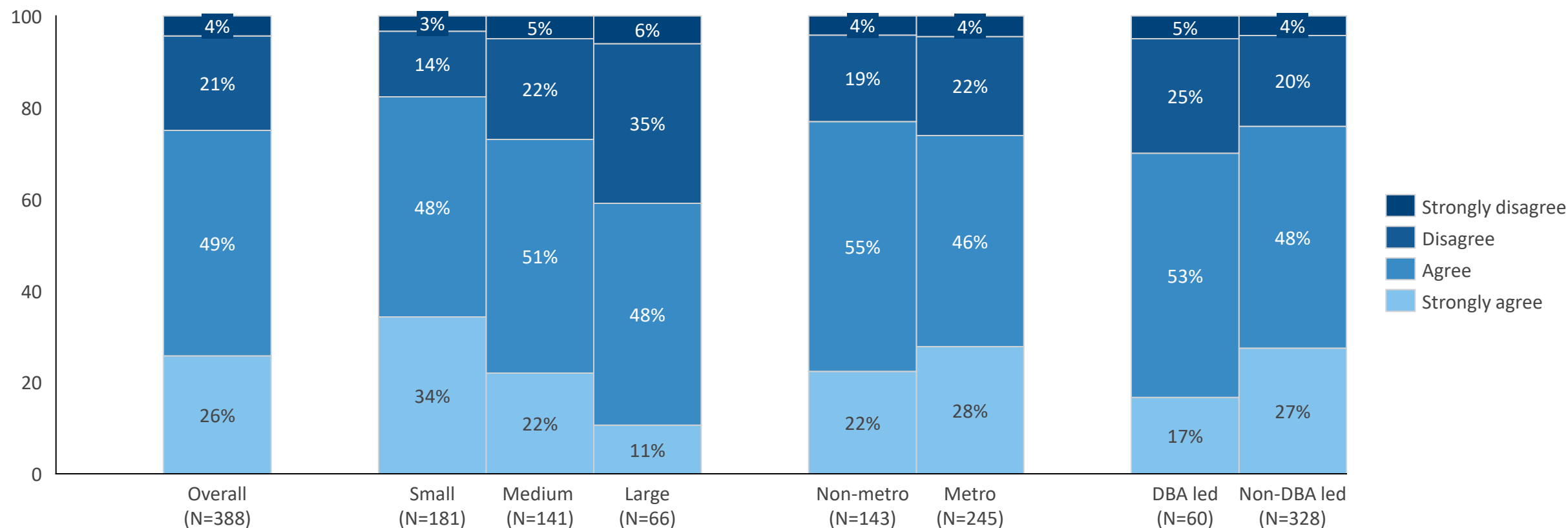
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Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2020

Q11: Please share the extent to which you agree with the following based on your organisation's operations in the last three years.

(C) Our organisation is currently running functions like finance and HR with less manpower than required.

% of total respondents



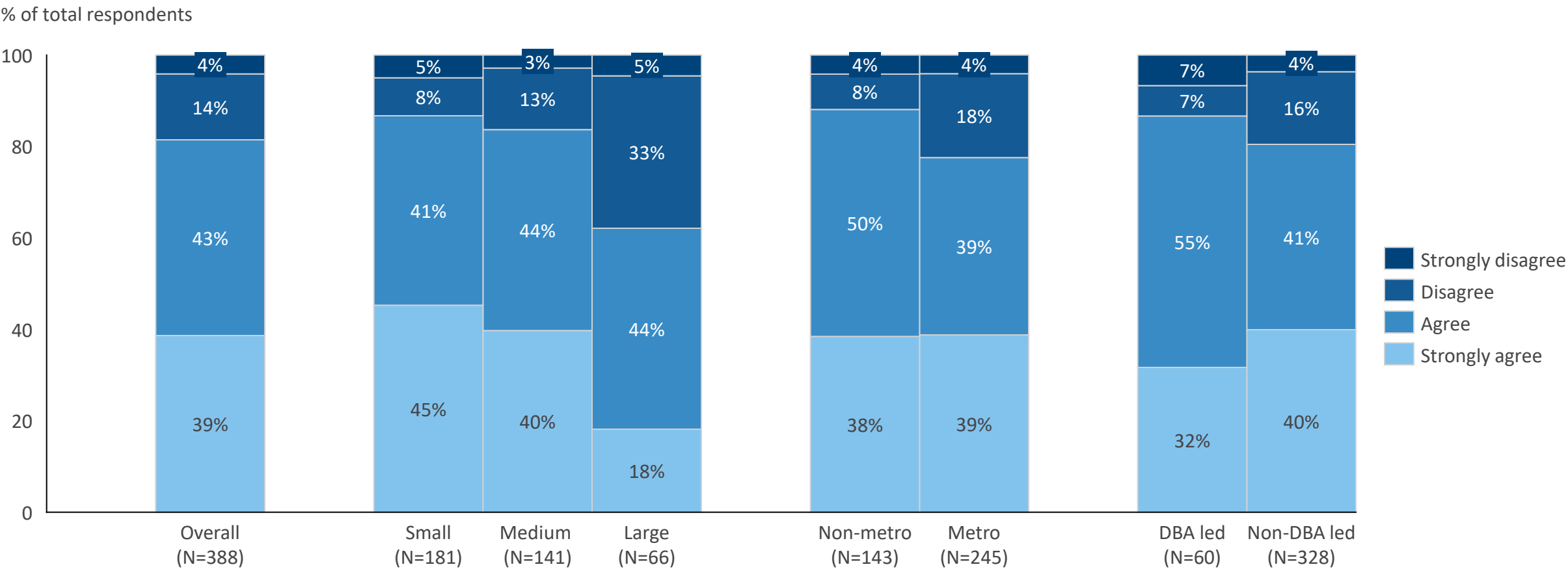
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Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2020

Q11: Please share the extent to which you agree with the following based on your organisation's operations in the last three years.

(D) We have missed fund raising opportunities due to lack of a dedicated fundraising/development team.



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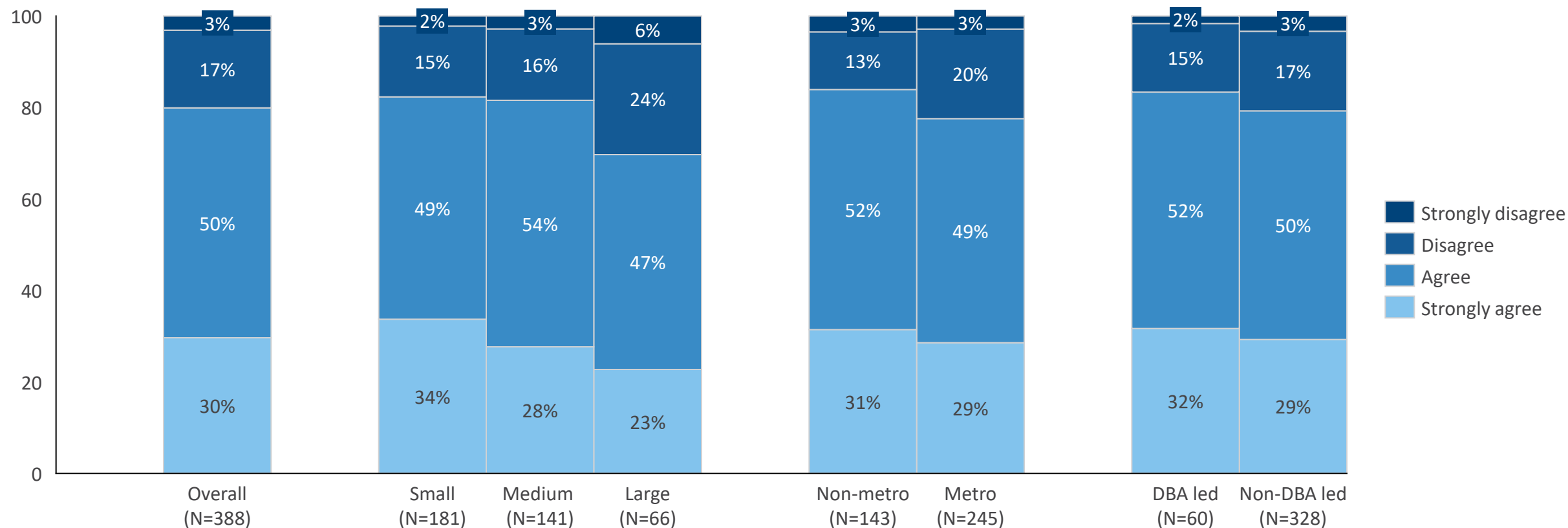
This question was also asked in 2025. Click here to view the data

Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2020

Q11: Please share the extent to which you agree with the following based on your organisation's operations in the last three years.

(E) Lack of flexible/unrestricted funding has limited our ability to innovate and improve programmes.

% of total respondents



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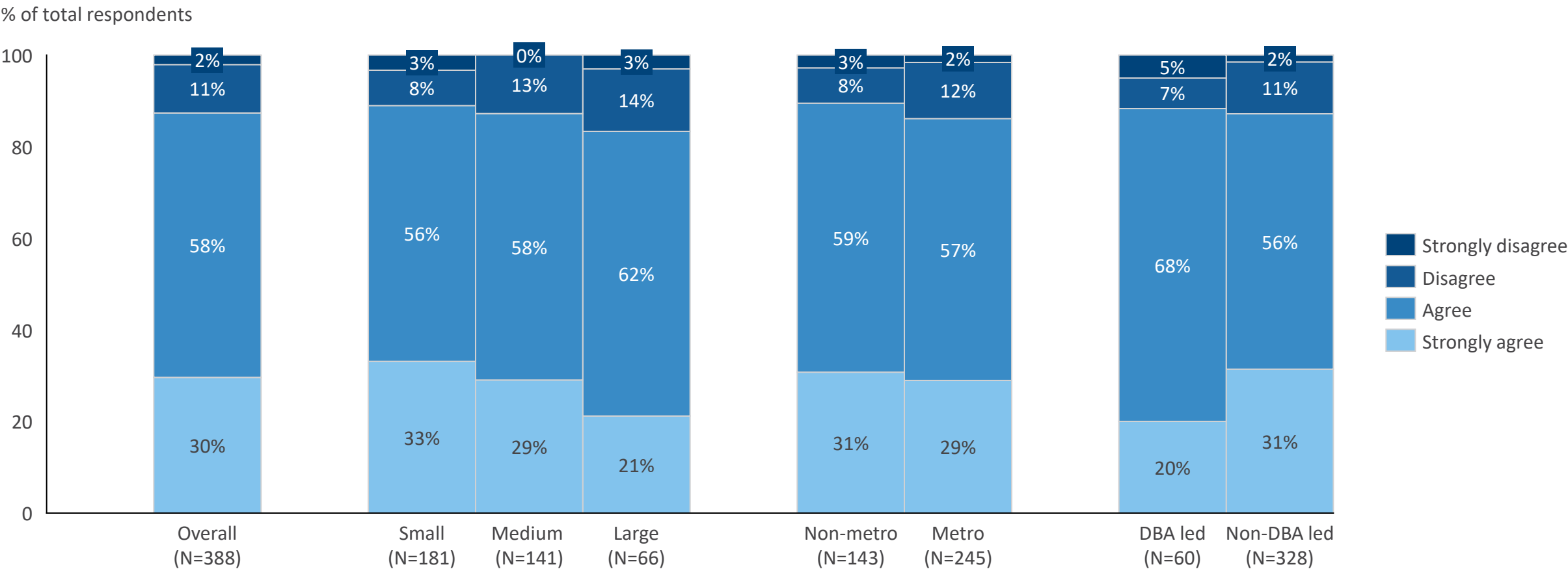
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This question was also asked in 2025. Click here to view the data

Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2020

Q12: Please share the extent to which you agree with the following based on your organisation's operations in the last three years.

(A) We feel the need to engage with external support organisations to help us in organisational development initiatives.



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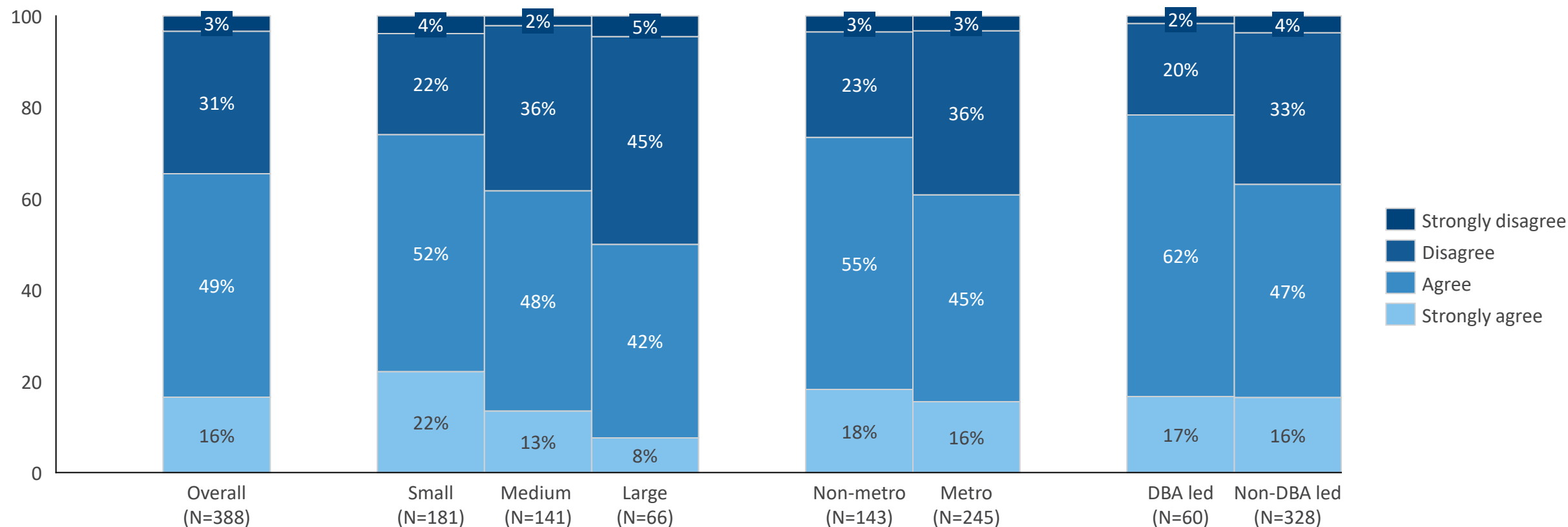
Source: Pay-What-It-Takes India Initiative Survey of Nonprofits 2020 conducted by The Bridgespan Group.

Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2020

Q12: Please share the extent to which you agree with the following based on your organisation's operations in the last three years.

(B) We don't know of any high quality and affordable support organisations to help us in organisational development initiatives.

% of total respondents



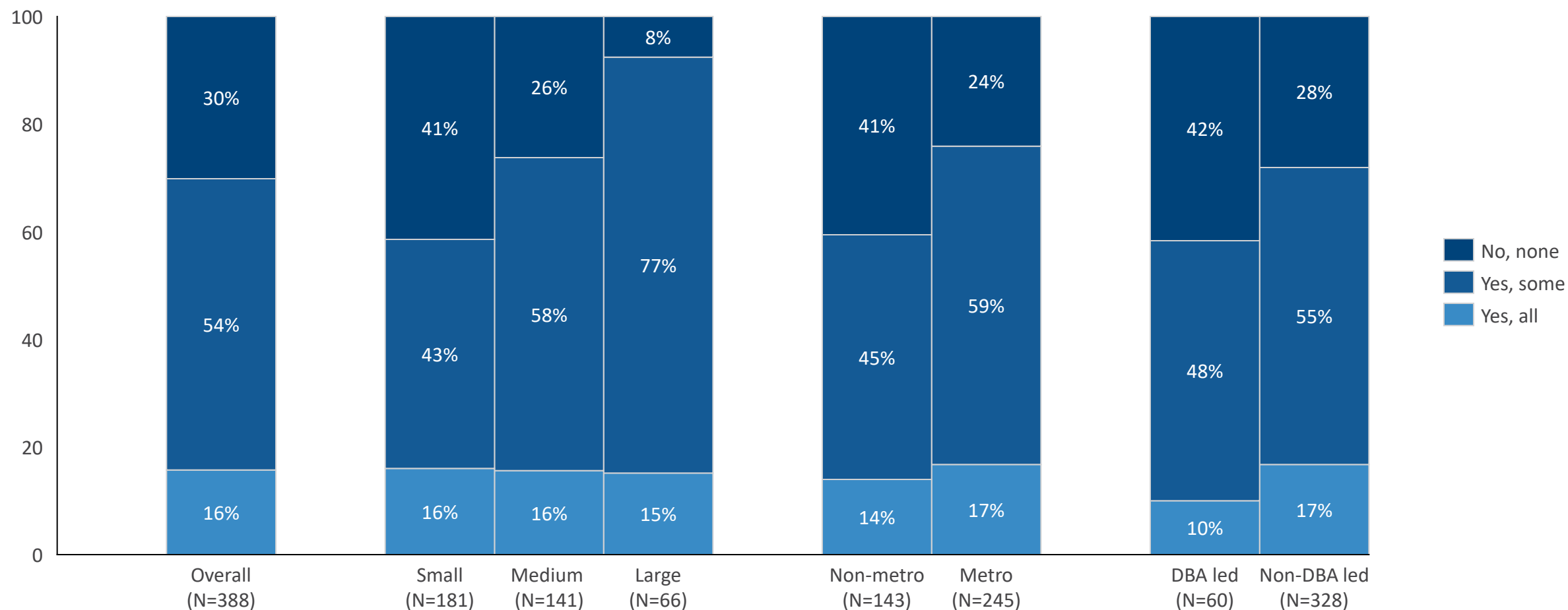
Note: Any discrepancies in percentage totals are due to rounding. **Metro organisations** are those with headquarters in Ahmedabad, Bangalore, Chennai, Delhi NCR, Hyderabad, Kolkata, Mumbai, and Pune. **Small organisations** are those with annual budgets less than Rs 1 crore, **medium-scale organisations** are those with annual budgets between Rs 1 to 10 crore and **large organisations** are those with annual budgets over Rs 10 crore. **DBA-led organisations** include those whose leaders belong to the Dalit, Bahujan or Adivasi communities.

Source: Pay-What-It-Takes India Initiative Survey of Nonprofits 2020 conducted by The Bridgespan Group.

Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2020

Q13: Have your funders made their grants flexible in light of COVID-19?

% of total respondents



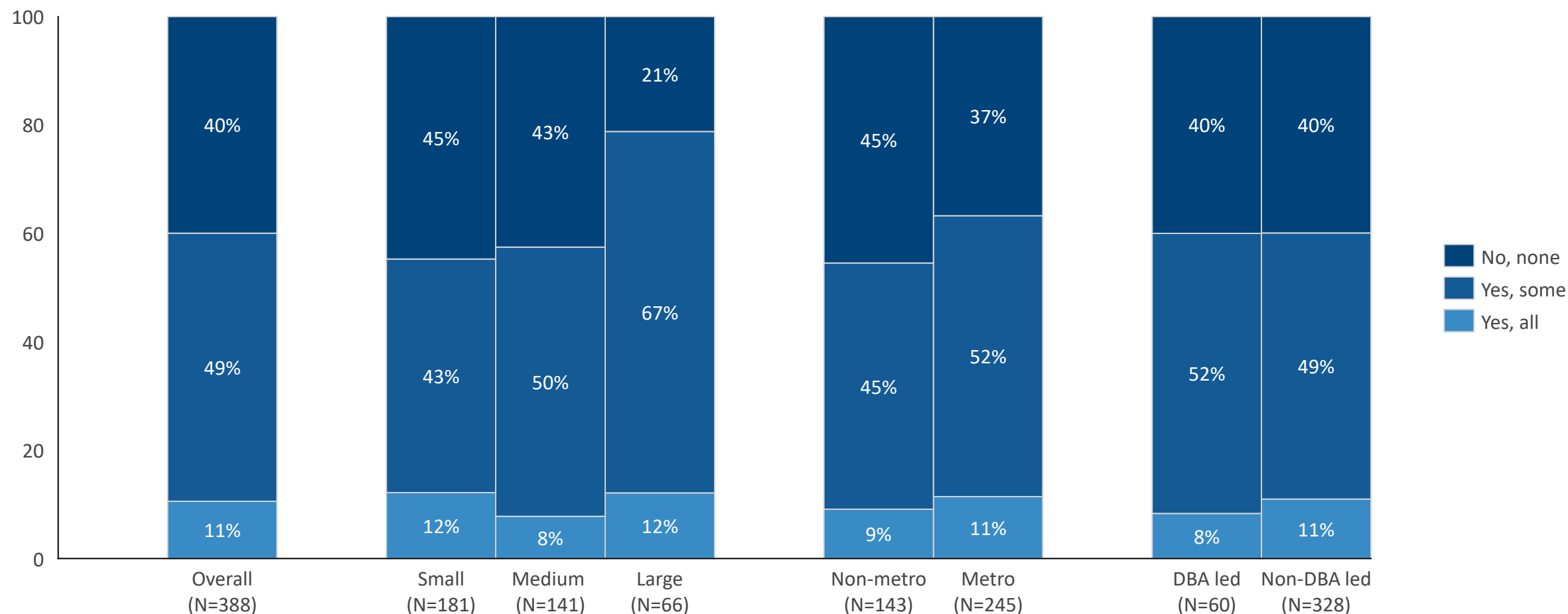
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Source: Pay-What-It-Takes India Initiative Survey of Nonprofits 2020 conducted by The Bridgespan Group.

Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2020

Q14: Have your funders allowed redirection of funds to relief for COVID-19?

% of total respondents



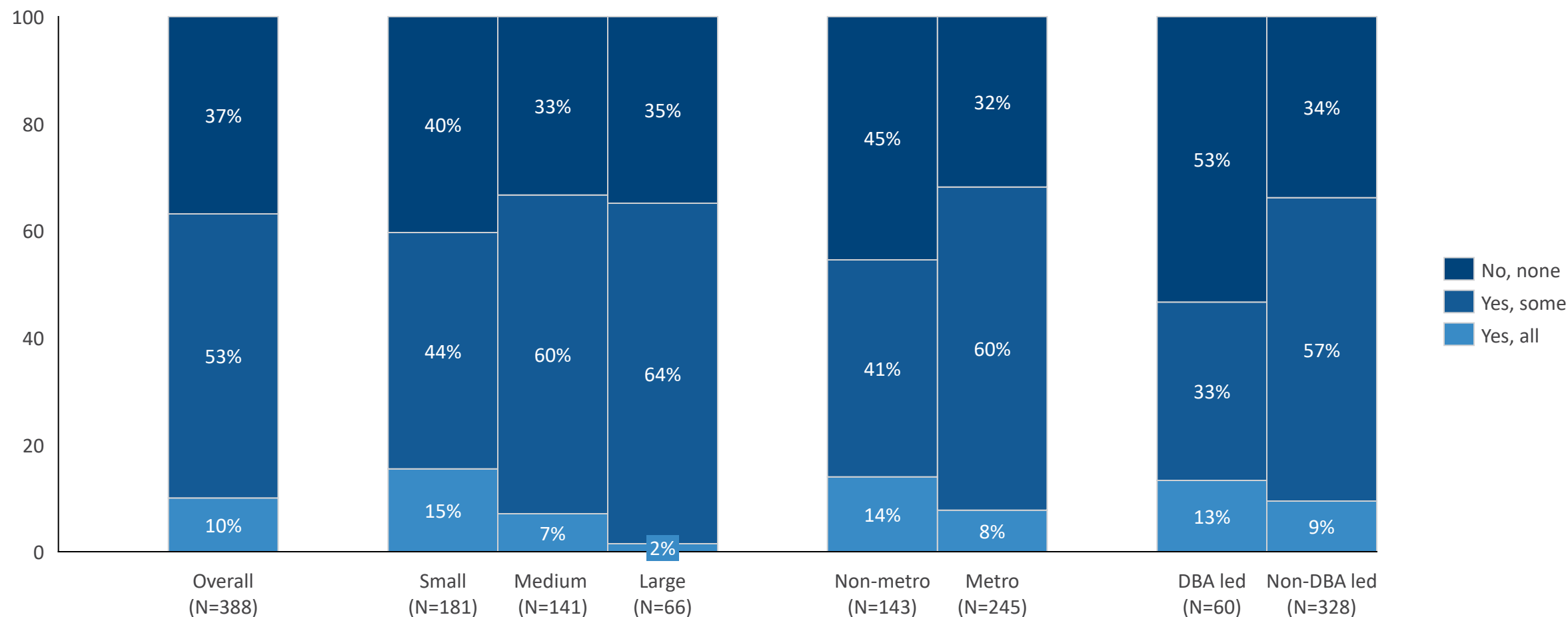
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Source: Pay-What-It-Takes India Initiative Survey of Nonprofits 2020 conducted by The Bridgespan Group.

Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2020

Q15: Have your funders reduced or cancelled their planned commitments in light of COVID-19?

% of total respondents



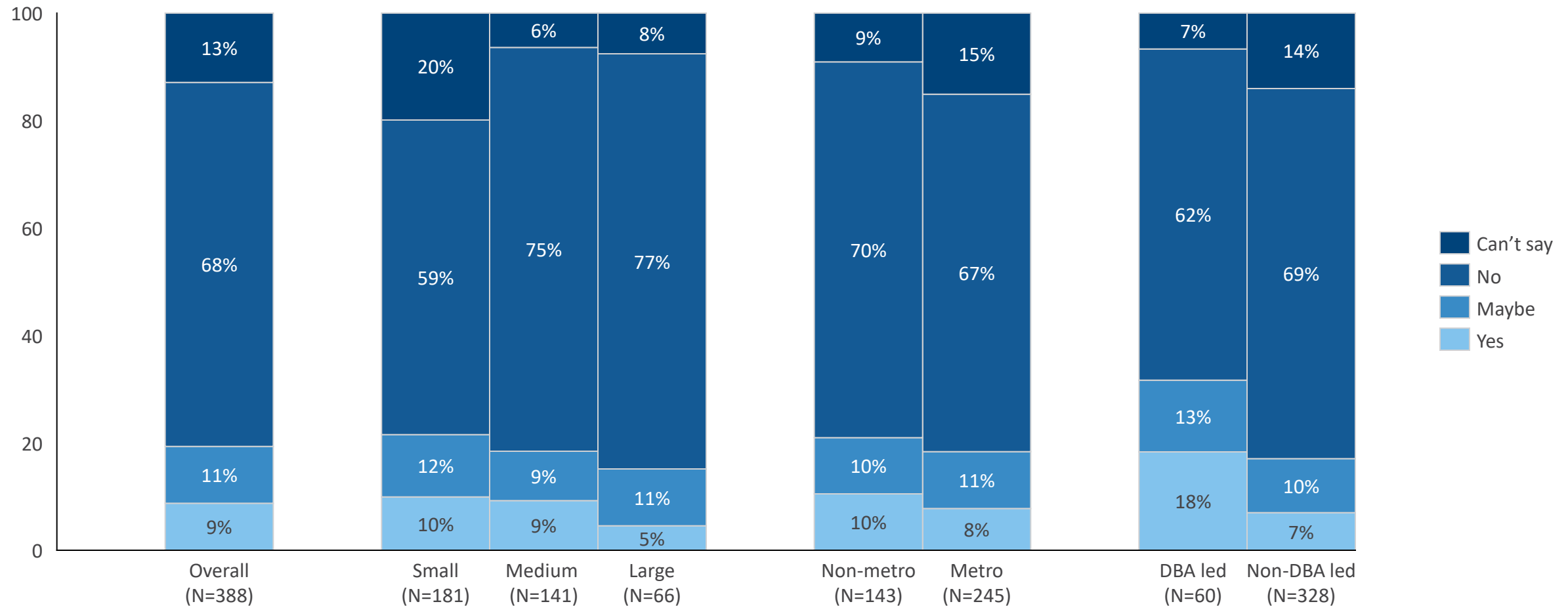
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Source: Pay-What-It-Takes India Initiative Survey of Nonprofits 2020 conducted by The Bridgespan Group.

Pay-What-It-Takes (PWIT) India Initiative Survey of Nonprofits 2020

Q16: As a result of COVID-19, have your funders committed/communicated support to financial resilience building measures (e.g. creation of reserves/corpus) for your organisation?

% of total respondents



Note: Any discrepancies in percentage totals are due to rounding. **Metro organisations** are those with headquarters in Ahmedabad, Bangalore, Chennai, Delhi NCR, Hyderabad, Kolkata, Mumbai, and Pune. **Small organisations** are those with annual budgets less than Rs 1 crore, **medium-scale organisations** are those with annual budgets between Rs 1 to 10 crore and **large organisations** are those with annual budgets over Rs 10 crore. **DBA-led organisations** include those whose leaders belong to the Dalit, Bahujan or Adivasi communities.

Source: Pay-What-It-Takes India Initiative Survey of Nonprofits 2020 conducted by The Bridgespan Group.

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Q17: What are the top three challenges you currently face with respect to true-cost funding (i.e. for nonprogramme costs or organisation development)?

Top challenges emerging from qualitative responses (N=340):

- **Overhead caps and underfunding of administration/core costs.**
 - Many funders cap “admin/overheads” at 5–10% leaving real indirect costs uncovered. Salary for management, rent, utilities, compliance, and technology are frequently disallowed.
- **Short-term, project-based funding (no long-term partnerships).**
 - Most funding is one-year, project-tied; OD or institution-building are rarely included. The horizon ends at the end of the financial year (on March 31) for many.
- **No unrestricted funding, corpus, or reserves (plus delayed reimbursements).**
 - Organisations lack unrestricted/core support and corpus for cash flow; many grants are reimbursement-based or delayed.
- **OD/capacity-building is unfunded or de-prioritized.**
 - Little support for organisational development — leadership development, culture, systems, fundraising capacity, policy/process work.
- **Donor rigidity, complexity, and misalignment.**
 - Rigid line items, non-standard formats, and little room for variance/extensions. Some funders value outputs over capacity/sustainability.
- **Regulatory constraints (FCRA/CSR and government rules).**
 - FCRA changes (e.g. 2020 sub-grant ban, 20% administration ceiling), CSR interpretations, and Government of India rules limit what can be financed as true costs.
- **Sector and geography biases.**
 - Certain geographies and sectors (urban slum health) see lower funder interest; donors often fund only “their area of work” or popular causes.

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Q18: What are some things that have worked well in fund-raising for nonprogramme areas, corpus creation and/ or organisation development?

Things that have worked well in fundraising for nonprogramme areas, corpus creation and/or organisational development (N=295):

- **Individual/retail giving and high-net-worth individuals (HNIs) along with crowdfunding from online channels.**
 - Nonprofits lean on individual donors (friends, family, alumni, small retail donors, and a few HNIs) for flexible or corpus grants. Additionally, crowdfunding/social media attracts small, unrestricted gifts; COVID-era emailers and online galas helped raise funds.
- **Flexible/international funders, core and OD grants.**
 - A few international and mission-aligned funders support core costs while raising overhead caps, and some also partially fund OD costs.
- **Build core and OD costs into grant proposals (with a clear rationale).**
 - Many successful fundraisers included core and OD costs in proposals by including finance, human resources, monitoring and evaluation, technology, and justified these costs by linking to outcomes.
- **Trust, transparency, and donor stewardship.**
 - Consistent reporting, field visits, and open books build credibility; internal champions within funder organisations often unlock OD/core cost support.
- **Earned revenue and fundraising events.**
 - Where possible, nonprofits earn flexible income by providing services like consulting, trainings, licensing content, product sales, and fees. They also use fundraising events to top up general funds.



Thank you



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