

Global Partnerships Podcast Series

Host: Ted Hart | President & CEO, CAF America

Guests: Meenakshi Batra | CEO, CAF India

Announcer: Learn how to take your caring and giving further with the Caring and Funding podcast powered by CAF America. CAF America, America's leader in cross border philanthropy helps corporations, foundations, wealth advisors, and individuals who wish to give internationally and with enhanced due diligence in the United States. Through its industry-leading grants management program **[00:00:30]** and philanthropic advisory services, CAF America helps donors amplify their impact and ensure their gifts are made in a safe and effective manner.

This Caring and Funding podcast is dedicated to these donors and the charities they support. Our guests are leaders in their field who join us to share tips for success and stories that inspire. Our host is Ted Hart, the CEO of CAF America. After the show, you can find all our podcasts at cafamerica.org on iTunes, and **[00:01:00]** now just say, "Alexa, play C-A-F America on TuneIn. Now welcome the host of CAF America's Caring and Funding podcast, Ted Hart.

Ted Hart: CAF America's global partnerships enable us to bridge those great divides by bringing to the American donor the very best of philanthropic expertise and services on the ground in countries around the world. **[00:01:30]** Through this podcast series, we introduce our listeners, our donors, to partners we collaborate with and partners who collaborate with us in making it possible for that long arc of history, that long arc of philanthropic change to bend a little faster, with much more assurance, and with that full regulatory compliance, risk management, and regulatory compliance that you have come to rely on from CAF America.

Today on this special edition of the Caring and Funding **[00:02:00]** podcast, it's my pleasure to introduce you to Meenakshi Batra, Chief Executive Officer of the Charities Aid Foundation, India. CAF India is a member of the CAF Global Alliance and is our partner in India, established in 1998 as a registered charitable trust to provide strategic and management support to corporations, individuals, and NGOs, with an aim to ensure a greater impact of their philanthropic and CSR investments. **[00:02:30]** CAF India promotes and supports all social development causes that positions the organization uniquely to address a wide cross-section of donor interests throughout India.

CAF India has a proven track record of conducting due diligence of nongovernmental organizations across India and have gained the trust of many individual donors, national and transnational companies, foundations, **[00:03:00]** and institutions. CAF India has a wide range of giving solutions, which include corporate giving, employee giving, individual giving. They also serve large multinationals, public sector undertakings, Indian commercial giants, by delivering their CSR commitment successfully. The projects pursued by CAF India lend

rigorous support to the marginalized societies in order to improve their socio-economic conditions.

CAF India provides **[00:03:30]** expertise and resources to help both partners and donors identify the very best NGOs to support in India. Meenakshi is a globally recognized development professional with three decades of multilevel international experience. Her skills encompass a wide range of development sector approaches, including strategic leadership, corporate social responsibility, philanthropy, organizational development and sustainability, program management, **[00:04:00]** campaigns, and networking.

Under her leadership for nearly eight years, CAF India has grown 600%. Upon joining CAF India in 2012, Meenakshi has initiated an organization-wide development process, setting the vision, shaping the organization, and driving growth and impact, positioning CAF India as a leading agency offering philanthropic and CSR management services to hundreds of donors and nonprofits **[00:04:30]** each year.

Meenakshi has been conferred with many prestigious awards for her work, including Indian Women Achiever Award, NGO Women Leadership Award, Women in Leadership Award, and many others. Meenakshi Batra, CEO CAF India, welcome here to the Caring and Funding Podcast in our very special Global Partnership series.

Meenakshi Batra: Thank you so much, Ted. Good morning everyone. It's **[00:05:00]** wonderful to be here and thanks Ted for inviting me to this show.

Ted: Well, it's great to have you here. CAF India and CAF America share a very close bond as do their CEOs. Meenakshi, you and I started in our posts at the same time in the same week. Since then, both of our organizations have developed tremendously. Talk to me a little bit about how that has meant to both of our organizations' development.

Meenakshi: Absolutely. It's been a wonderful journey, **[00:05:30]** the last eight years when we both started out together. I remember the last meeting in London at the CEOs' meeting. I was still getting introduced to the whole sector, but then I have learned a lot from the colleagues across CAF Global Alliance and especially from you. We have had wonderful partnerships over the years to grow giving. In India, our focus is to grow giving in **[00:06:00]** India. Our legislation does not really incentivize us to work outside India, but there is a lot to do in India. With your support, with the support of colleagues across Global Alliance and American donors, we have done wonderfully especially the Indian--

When I joined CAF, within a year we had this wonderful opportunity where the government basically required all corporates to undertake CSR, which was basically **[00:06:30]** calculated as 2% of their net profit before taxes. That created a huge opportunity for doing development work in India. To this, a lot of corporations, especially the American corporations with whom we work added their philanthropic funding as well. They added their foundation funding. They brought on board the payroll giving program. It's been a

great journey. I mean, we have been really [00:07:00] running a very integrated giving program here in India.

Ted: One of the things I've learned about you over the years is your incredible background that you've brought to your role in CAF India. It's fascinating to me that you worked in Afghanistan following the time of the Taliban. How did that leadership role help prepare you for the tremendous growth that you've brought to CAF India?

Meenakshi: That was a wonderful journey. I think I learned a lot during my seven years [00:07:30] in Afghanistan off and on. I wasn't there continuously for seven years. I first went there in 2003 when the country had just opened. The new government was set up. There was nothing inside when it comes to infrastructure, developing infrastructure. The buildings were there, but they were bombed out. There were no ministries. There were very few development actors. Some NGOs who used to operate were operating from neighboring countries. [00:08:00]

We were amongst the first ones to move there, a very challenging time. The circumstances were really very, very difficult, but a huge opportunity also to make a difference because we were dealing with a section of the world population which was extremely impoverished, which had been through decades of war. They didn't know what the outside world looks like, what opportunities people across the world are enjoying. [00:08:30] Children did not have access to health or education or nothing. There was very little there in that country. I worked there and it was really a great place to work.

One of the things that happened while working in such difficult circumstances I discovered that I have such resilience in myself that I can work with calmness in an overwhelming [00:09:00] situation. What I learned was to work one step at a time. It was such an overwhelming situation. A lot needed to be done. Then I said, "Okay, we will take one step at a time, make a success of it."

When I came back to India and took up the CAF India job, I knew that again I had a huge task in front of me where we were starting to explore [00:09:30] the philanthropic giving space in India. Again I said to myself, "One step at a time. We'll have to move step by step." It's an emerging market. It's a growing market, and we have done good work in the last seven, eight years, but I think there's a lot more to do. I know that a lot of people across the world including India are very interested in seeing [00:10:00] our country do more, do better. This is an opportunity to bring a change to our country here.

Ted: As we begin speaking specifically about the expertise CAF India has and the work that you do in supporting American donors, help us understand the significance of CAF India's regional experience in Bangladesh, in Sri Lanka, and other places.

Meenakshi: Ted, I have myself [00:10:30] worked in some of these countries. I have worked extensively in Nepal, in Sri Lanka, Bangladesh. I've lived there for a few years.

Actually, socio-culturally, we have a lot of similarities even though we have boundaries. Afghanistan, of course, I shouldn't forget that. There are lots of similarities. The economy again has similarities, our culture is similar. The way people live has a lot of similarities. **[00:11:00]** Therefore, our problems are also similar to some extent.

Of course, every 10 kilometers, you find a different requirement when it comes to development needs, but I think there could be a lot of cross-learning. We could be taking the lessons that we are learning and growing philanthropy and giving in India. Those lessons can be taken to the neighboring countries. We can really work with key stakeholders **[00:11:30]** there to grow giving.

There are huge networks of NGOs that exist in these countries which already interact with each other, but we really need to do more when it comes to opening our border in terms of allowing us to do work in other neighboring countries and therefore, also allowing them to work in India. A lot of cross-localization can be done here in the region. **[00:12:00]**

Ted: That's good. India is of course a very large and important economic power base in the world, a very large population in the world. Therefore, there are a lot of philanthropic interests that Americans have in India. Many donors, CAF America, have interests throughout India, and many times, we have the opportunity to work with CAF **[00:12:30]** India.

One of those areas is in enabling on-the-ground grantmaking in India. CAF India can manage grants on the ground. I was wondering if you might share with our listeners maybe an example that illustrates this kind of service that CAF India can bring when needed to help donors really succeed on the ground in India.

Meenakshi: Absolutely. I think that Ted, the advantage that we have is that **[00:13:00]** we're very close to the ground, we're very close to the action. We are very well-networked within the not-for-profit community in India. I'll pick one example. When CAF America introduced us to Herbalife Foundation, I think it was about five or six years ago, we were looking at that point of time at just international grant-making it into India, funding coming from the foundation to India to **[00:13:30]** support a few NGOs.

We started working with their local counterparts and that was seen as a huge value-add by the foundation. We connected with their local offices which are in Bangalore, in the south of India. We spoke about the CSR work that they were supposed to do. It was just starting out. CSR was a new thing then in the current format. We started talking to them about it, helping them **[00:14:00]** shape their program design.

We also spoke to them about their vast distributor's network. There's a lot of philanthropy that happens in that distributor's network. It was a large network right across several states. We worked very closely with them to organize gala events. We encouraged the distributor **[00:14:30]** networks to contribute to the social development causes. Then, of

course, we also later worked with them on payroll giving of their employees, which also happens and when a disaster happens happens their employees are donating. We combined all of these resources together to actually have a very robust and a largish program.

This was really seen as a positive by the foundation in the US because we were pulling in resources from [00:15:00] multiple sources within their ecosystem of Herbalife itself. Some great work was done in terms of early childhood development, addressing a lot of poverty issues. That was a very, very fruitful partnership and we are grateful to CAF America for making that introduction to us.

Ted: It really gives a good example of [00:15:30] how a project can start one place and grow into other types of service based on the kind of richness of services that are available at CAF India. We're going to take a very quick break. When we come back, you had mentioned one of the services that you provided with this particular donor was that of payroll giving. We're going to explore that a little bit further when we come back from [00:16:00] this quick break.

[music]

Advert: Remember, our podcast and archives are always available 24 hours a day at cafamerica.org, on iTunes, or just say, "Alexa, play C-A-F America on TuneIn." Now, back to the Caring and Funding Podcast and our host, Ted Hart.

Ted: Meenakshi, oftentimes there are employers who have employees who are both in the US and in India. [00:16:30] They're interested in sinking up their platforms where employees in the US can receive a charitable debt tax deduction and have donations support charitable causes in India. They may be interested in providing their Indian employees with a charitable tax deduction. As well, they want to have integrated programming and sinking up the programs between CAF America and CAF India on a payroll giving platform is one [00:17:00] way to do that. Help us understand an employer's interest in payroll giving and the kind of services that a donor can receive if we partner with CAF India.

Meenakshi: Absolutely. Ted, that has been one of our most successful programs I would say that we have partnered with you on. I think the advantage of dual tax exemption, you can give tax exemption in the US [00:17:30] and we can do that in India, is a huge advantage to the employees. Employees definitely want to see a greater integrated program. They want to see more impact.

Often, we have cases where a US-based employee wants to make a donation to India. Of course, you can get access to a list of charitable [00:18:00] organizations in India, but we provide a lot of handholding and support. Having the payroll giving program grow. What we do is while working with the local employees, we do a lot of events on the corporate

campuses. We bring the NGOs to the campus to do certain-- Whether it's the sale of handicrafts or certain other shows or interactions with the beneficiaries. [00:18:30] The NGOs, when the employees hear the stories from NGOs directly and from the beneficiaries, they are much more encouraged.

Actually, to give you one example, there was one year when we had-- Typically, there is about 15%, 16% enrollment in India in giving, but in this particular one year, we drove the enrollment of payroll givers to 92%. [00:19:00] That was an amazing result. It all happened because there was a huge interaction.

The same service can be extended of course online to the employees based in the US. They can hear the stories of the not-for-profit organizations, the impact that their donations are having on the lives of people, how it's changing the lives of people. That's a huge advantage of working together. [00:19:30] More integrated programs I think are the need of the hour, and it will grow philanthropy in a much more stronger manner.

We know that in today's world, most of the issues are sort of glocal. There are no boundaries. If some employees in India are making donations to a climate change project, any negative impact of that climate change problem can happen anywhere in the world. It's in the interest of employees across the world to come together and to support programs in an integrated manner so that the impact can be really made much stronger, bigger.

Ted: Meenakshi, one of the areas that I think is so visible, at least to CAF America is the area [00:20:30] of diaspora giving. Donors of Indian descent who have been very successful businessmen and women who want to give back to their home country. It's a big country and it's not always evident who the very well-run charities are and the good impactful places to invest your philanthropic [00:21:00] dollars.

Through the partnership between CAF America and CAF India, these donors are able to give and to give with confidence, to know that their donations will go to good causes and will be used for impactful giving in India. Talk to us a little bit about that and how particularly donors of Indian descent, speak to them directly through this podcast, can give with confidence in this partnership [00:21:30] between CAF American and CAF India, giving directly to important causes in India and know that they're going to really make a difference.

Meenakshi: Ted, I'll talk about two things here. One is the diaspora comes from various parts of India. India is one country, but we have a number of states and a number of districts. Often I've seen people have interest in sending money back to the village or the district or the state where they come from. [00:22:00] CAF India has a vast network of NGOs.

My aim is to have an NGO in literally every district of the country. I think we are there almost in about 70% of the districts of the country. This is being done to enable donors to

access the geographies in which they are interested, but of course then in addition to geographies, we also have national issues such as education [00:22:30] indicators or health indicators. People can choose that way also.

One is to create infrastructure which people can access in terms of where they want to give and how they want to give. That's one thing we do. The second thing that we do here is through our very robust accountability measures, we have done a thorough due diligence of the NGOs. In addition to that, we also [00:23:00] do a lot of handling of the NGOs, we put time and effort in building capabilities of NGOs so they can become stronger.

We also offer a program design services to the donors. If someone wants to do some research in a thematic issue or in a geography in which they want to invest their philanthropic money, we can provide program planning [00:23:30] services to them. We can create robust programs which are relevant, which are based on data, which are based on even government analysis where the gaps are. All of those sectors are taken into developing a program.

We also focus quite a lot on ensuring our mainstream linkages. What we encourage our donors to do is [00:24:00] to see that their programs are not standalone. They're somewhere aligned with the government program so once they move their funding to another program, things could be carried forward by the system itself. We provide a very vast canvas to the donors and bespoke services can be provided based on the interest, both thematic and geographical [00:24:30] interest of the donor. Both can be done by CAF India, while ensuring a robust system of accountability from CAF India.

Ted: Meenakshi, we're always very impressed with the strength of CAF India's programs and of course, the strength of your team that you have built in the partnership with CAF America. In the few moments that we have left, there is another area that I wanted to explore and make sure that you [00:25:00] share with our listeners today. That is another very significant area of expertise that CAF India has and that is for donors who have a bigger idea than perhaps just a donation or wanting to support an established charity, but they have an entire charitable concept in mind.

CAF India can serve as an incubator for programs and even organizations [00:25:30] providing infrastructure to the support of new ideas that can be for a city or region or for the country of India. Talk to us about the capacity that CAF India has because that's a big deal to be able to offer that service.

Meenakshi: Setting up an organization afresh can be very challenging in India. It's a long process. It's a difficult process and people may not always succeed. [00:26:00] We offer partnership to the foundations or the organizations which are outside the country. We can host them, we can run their programs for them, we can provide them the services based on the development agenda that they want to pursue in the country.

Again, as I was saying that our systems are pretty robust, we can and we are fully compliant with all the laws of the land so that really comes handy. We work with quite a number of international foundations based out of the US and one in Canada. Where again, it was a foundation which was established in Canada by a group of Indian diaspora who wanted to support some projects in the state of Uttar Pradesh, so we provided them **[00:27:00]** that platform for fulfilling their programming needs.

Similarly, Bernard Van Leer Foundation is another organization that we work very closely with, we host their program in India. It's a strong partnership that we have developed with them. We basically run their program for them.

In the past, we have incubated quite a few organizations, **[00:27:30]** which are now today full-fledged organizations in their own right, really doing great work. We basically can take care of the operation as well as the programming needs of such organizations.

Ted: Meenakshi, thank you for sharing with us today this strong tapestry of services that we certainly benefit from in our partnership with CAF India. I'm going to give you an opportunity to **[00:28:00]** just wrap this up in the last few minutes that we have here together. You have often said, when we work together more can happen in India, and I think you've certainly made that case here today.

Meenakshi: Absolutely. I completely agree with you on that, Ted. I think if we work together, we can really get more out of the philanthropic donations of our donor partners. Your access to donors and your services in the US to the donors, **[00:28:30]** combined with our on the ground capabilities, our strong accountability systems, combined with your also very robust due diligence system, I think with this, we can really achieve great impact. We can help people track impact, we can help them rethink design also. We can build programs year on year with our donor partners, building on the successes that they have.

To this, we can also combine it with the possibility of local funding **[00:29:00]** or possibility of local volunteering. Not just the funding, but also when people want to give their time, skill and effort. That can also be brought on board. The government relations are very, very important. Mainstreaming is very, very important. We have those capabilities to support international donors. Our strong awareness of on-the-ground reality has been found very, very useful by international donors.

Announcer: **[00:29:30]** You've been listening to the Caring and Funding Podcast powered by CAF America. Tell all your friends and colleagues to check out our archives, sign up for our free newsletter and download our iPad and iPod friendly podcast at cafamerica.org. Thanks for listening to the Caring and Funding Podcast. **[00:30:00]**