



BUILDING SYNERGIES THROUGH COLLABORATIVE PHILANTHROPY



EdelGive
Foundation

An Edelweiss Initiative

ANNUAL REPORT 2015

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Dear Friends,

I am very pleased to present the seventh Annual Report of EdelGive Foundation. Our journey over the last seven years has been educational, humbling and exciting in equal measure. We have had the privilege of meeting and working with some great NGO leaders, philanthropists and Foundations: people who are deeply concerned with developmental issues and are using intellect, networks and communities to solve some of the most intractable problems of poverty that surround us. We have had as our parent, Edelweiss, an exceptional organisation that has trusted us not only with funding and its employees who form the bulwark of our capacity building work, but have given us the space to experiment (albeit wisely) and take calculated risks with our grants. While most of our grants have “worked”, we have learnt a lot more from those that didn’t! We have learned

what not to focus on; we have learned how the best organisations can falter when scaling and sustainability is not planned to the last detail; we have learned the importance of pilots and of listening to communities and we have learned how to find the next best organisation doing path-breaking work.

Most of us who have been in this sector long enough understand how complex and inter-connected development issues are. And so we have never viewed our effort through the narrow lens of a one-to-one relationship of funder and fundee; rather we have engaged quite doggedly in creating a community of people interested in learning and working together – whether it be our NGO partners, foundations and philanthropists, thinkers and capacity builders and our employees. Our community of NGO leaders is growing steadily, and we have a great mix of age and youth, passion and intellect. But we do believe that we have created a platform for our young leaders like Byomkesh Mishra and Christopher Turillo of Medha, Mamoon Akhtar of Samaritan Help Mission and Syed Merajuddin of Adharshila to learn from Mr. J. K. Sinha of Soshit Seva Sangh, Rajesh Singhi of Ibtada and Rajiv Khandelwal of Aajeevika Bureau. Indeed, the latter have also valued the benefit of partnership and idea exchange that our two platforms, ‘EDGE’ and ‘At The Same Table’ have provided, on a concerted basis, not only from the fellow NGO leaders but also from the Foundation and philanthropists who are active participants in these forums.

Finally, all of our capacity building work is enabled only because of the tremendous and enthusiastic support we get from the employees of Edelweiss. We are uniquely fortunate to have 35% of the Edelweiss employee family of 5,500 engage with us and that number is growing rapidly. We are very pleased to have launched this year, our senior coaching and mentoring programme for NGO founders, wherein senior Edelweiss leaders engage as coaches and mentors with our NGO partners.

As we look forward to growing our work on all dimensions – funding, capacity building and a great community of Foundations and philanthropists, I would like to offer our deep gratitude to all of you who have made us grow stronger and wiser!

Vidya Shah



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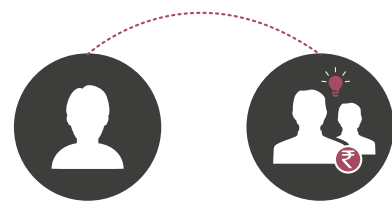
EDELGIVE FOUNDATION



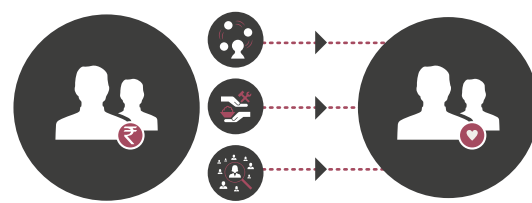
ABOUT US

EdelGive Foundation is the philanthropic arm of the Edelweiss Group and was established in 2008. This was much before the amendments under the Companies Act made it mandatory for all corporate entities to allocate funds to sustainability and social responsibility.

The foundation works on two major principles, that of



1 Being a bridge between the users and providers of philanthropic capital and knowledge



2 Bringing the skills, resources and talents of the for-profit world to the not-for-profit arena

This is complemented by well-planned employee engagement initiatives that are ingrained within the ethos at Edelweiss.

EdelGive is registered under section 25 of the Companies Act, 1956 in India. This legal status means that the Foundation has been granted a license from the government which recognises its objectives as charitable, and that all of its profits will be used in the pursuit of these objectives. There is a separate advisory board for providing strategic guidance and inputs to the Foundation which oversees its functioning. Under the purview of section 135 of Companies Act, 2013, a Corporate Social Responsibility Committee has been formed to provide strategic and governance support. The committee suggests partnerships with new ecosystems, provides unbiased advice on investing strategy, and links with key talent pools in Edelweiss for continuing capacity building support to the NGOs.

The activities are also overseen by the company's Corporate Social Responsibility committee (a recent legal requirement in India) which has a duty to reflect and report on the legal minimum two percent of company profits that go towards attaining social and environmental goals. The company's giving has already exceeded the legal minimum, which is testament to the ideals that the company holds.



Our Vision

Our vision is to build a strong, efficient and high-impact social sector for a better India.



Our Mission

Our mission is to leverage the capacity and capital of the for-profit world to equip and enable the social sector to achieve the greatest impact on the lives of the poor in India.

01

EDELGIVE FOUNDATION



ABOUT US

Our approach is inspired by the idea of collaborative philanthropy and we are seeking to create a well-knit network of non-profits, philanthropists, foundations and the corporations to ensure a healthy flow of capital and expertise into the social sector.

Since its inception, the resources mobilised by EdelGive have positively impacted more than 60 NGOs working in the areas of education, livelihoods and women's empowerment which has directly influenced lives of more than two lakh individuals.



The investees supported by EdelGive are selected after an intensive due diligence process wherein, important parameters are analysed and the model of intervention is thoroughly studied this step is imperative because our aim is to provide support where it is most needed which demands an extensive scrutiny. Once the association is established, the programmes followed by the NGOs are assessed in depth and a customised support system is put in place for each investee.

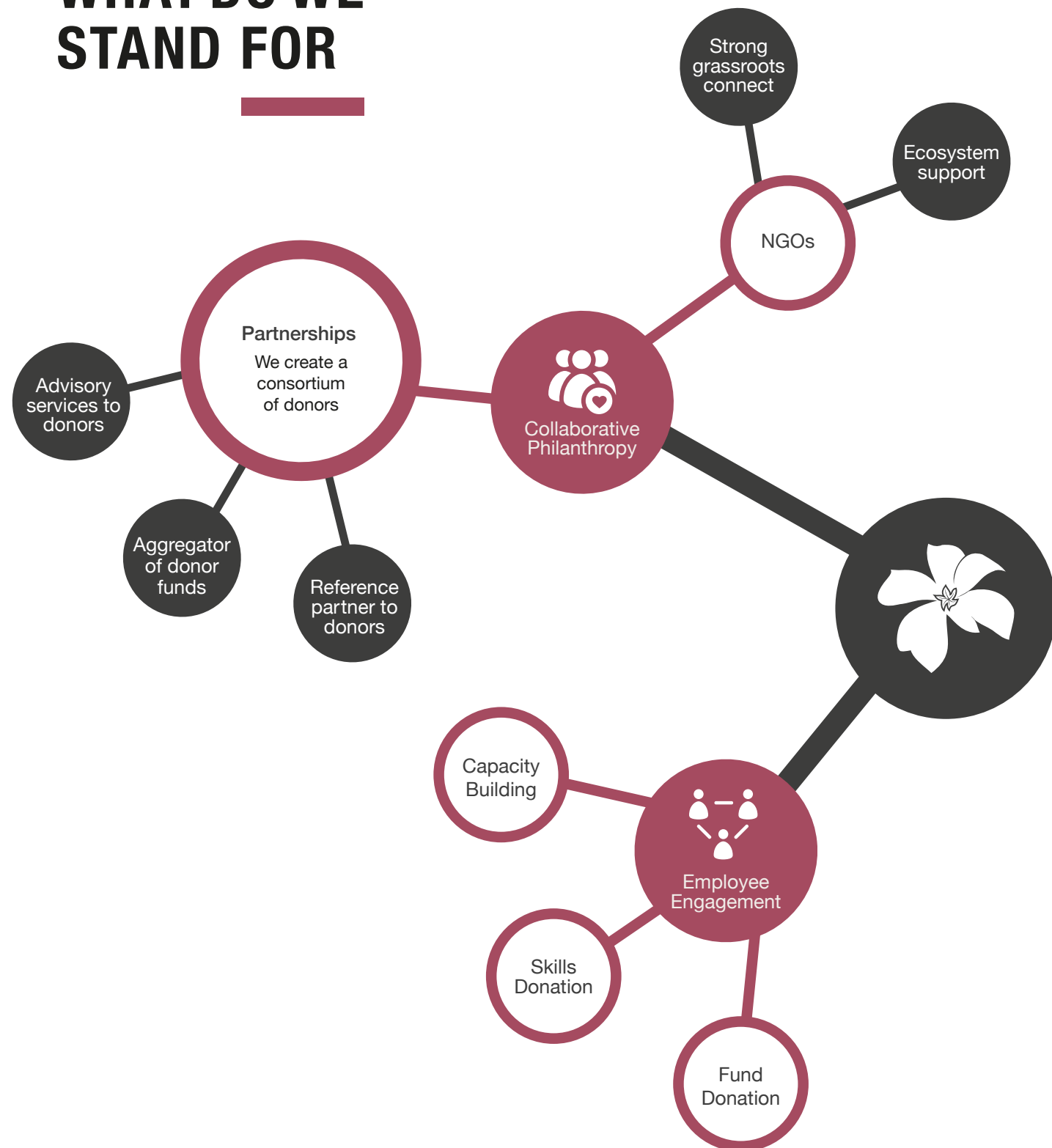
We believe that the richest of all resources are human resource and human intelligence, both of which can be leveraged to keep pace with the rapidly changing definition of Corporate Social Responsibility. Subsequently, under the Employee Engagement Programme, each employee is motivated to contribute with their expertise in order to help the non-profits by guiding them for capacity building projects and financial sustainability. Over the last seven years, a collective involvement of over 10,000 hours by the Edelweiss workforce has benefitted various NGOs in scaling up their activities.

Building Synergies

In line with our goal of bringing together for-profit entities and the not-for-profit institutions, we engage in creating innovative platforms for dialogue. With an aim to ensure better understanding of the ground reality, EdelGive recently launched 'At The Same Table' which is a zero cost discussion forum for the donor community to mutually choose an issue and deliberate over it while also showcasing the solutions and motivating them to go beyond the cheque book.

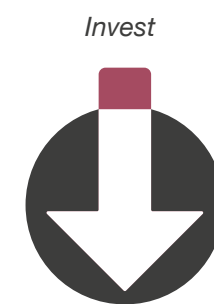
We believe in creating synergy by bringing together our investees for discussions in the annual event 'EDGE' wherein, they engage in analysing the different models of development in place.

WHAT DO WE STAND FOR



What drives us forward is the role we play at different levels amongst the investees and the donor community. Our model is built on the idea of providing an 'Ecosystem Support' while also ensuring strong grassroots connect among the NGOs, professionals and the social sector as a whole.

We strive to stimulate the idea of



This has rendered us as a catalyst between donors and agents of change.





02

INVESTMENTS



02

INVESTMENTS



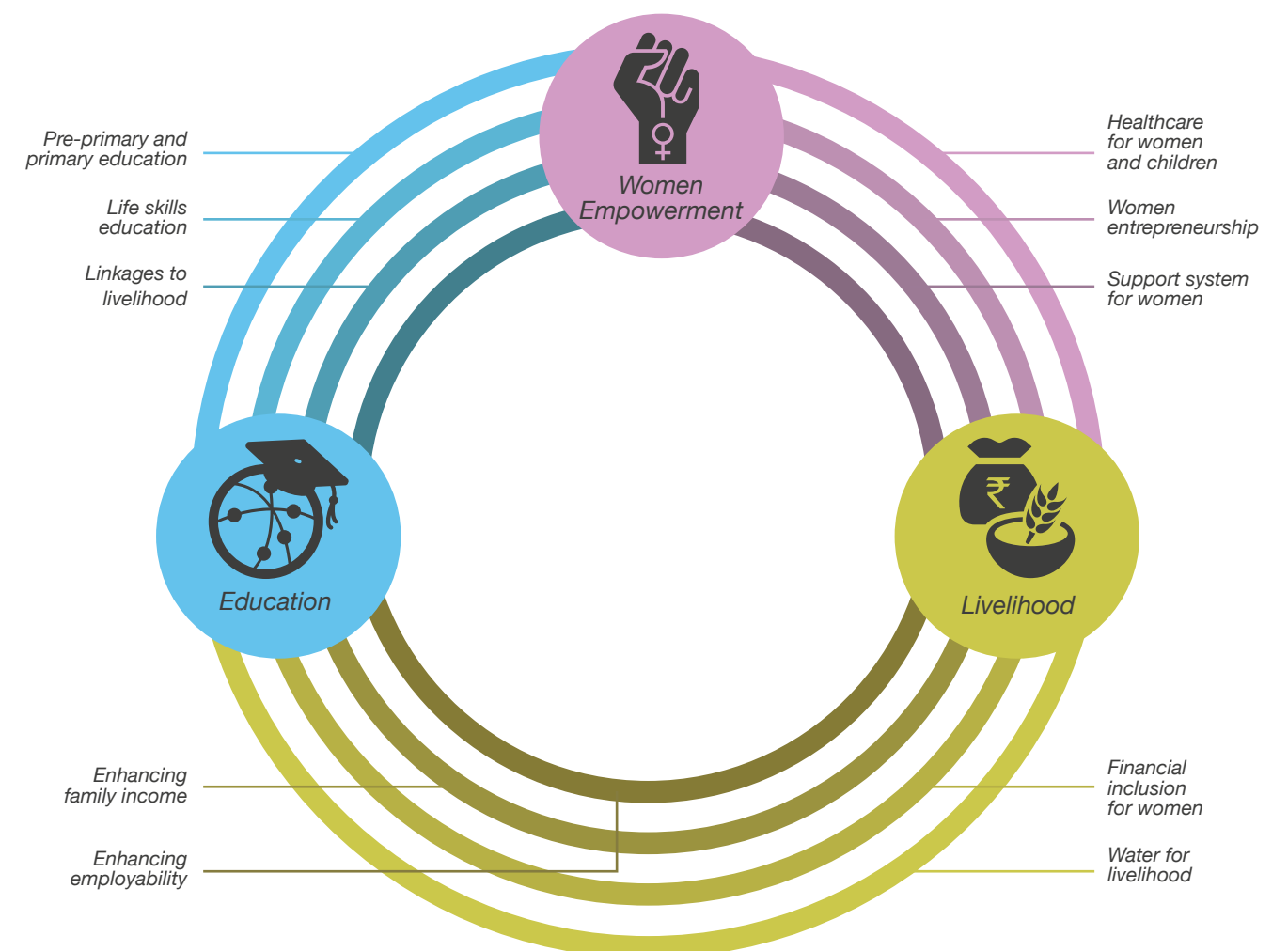
OVERVIEW

Since its inception, EdelGive Foundation has been active in three focus areas : **education, livelihoods and women empowerment**. More than 50 percent of our NGO partners are working in the education sector and this has been a conscious effort on our part in order to create a productive base for majority of our beneficiaries.

This year saw a rise in the number of investees working towards the betterment of livelihoods and for the poor, thus an addition was made under the health sector as the need to integrate all the necessary developmental elements was critical.

Going forward, the aim is to raise the impact by balancing our portfolio to include a significant number of projects under livelihoods and women empowerment. The issue of women empowerment is much talked about, but is a sensitive area of intervention and it has been our conviction to select the most unique NGOs in this section.

EdelGive Foundation has three broad development areas on its radar and works towards mutually benefiting them



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INVESTMENTS



OUR APPROACH

'Between seed and scale' is the essence driving our investment model which is an outcome of the belief that while an idea is necessary to bring about change, there is critical need for professional assistance at the stage when the initial thought has crossed the inception phase. Hand-holding to a small or medium sized organisation can render them successful in refining their processes and methods of intervention. Once this has been achieved, the external support can be gradually withdrawn leaving them to scale up their programmes.

Our partners share a common feature of having unique and innovative models in place while carrying out extraordinary work in their chosen field and location. The approach of our partners towards active community engagement and the change inspired by the real need of people has provided them distinct positions in their respective fields.

While our investments are spread across India, the common goal EdelGive has adopted is to support NGOs inspiring policy change while having a direct and effective intervention model in place.

Our Approach



EDUCATION: The portfolio is a blend of projects that are committed to creating a child friendly environment as they are the receivers of education. They are bound by their endeavour to bring quality to learning, developing better citizenry and shift in outlook of communities towards girl child education, realisation of dreams for educational achievement for the underserved in difficult terrains and hard-to-reach areas, while simultaneously enabling an environment for policy change.



LIVELIHOOD: EdelGive's approach to livelihood includes reducing economic and social vulnerability by enhancing employability, skill-building and vocational guidance to help increasing income and earning potential, increasing awareness of government entitlements through rights advocacy and focus on augmenting rural income through the use of improved and sustainable agricultural practices with a strong integration of interventions for water crisis mitigation in arid regions.



WOMEN EMPOWERMENT: This portfolio remains focused on changing dynamics for women and girls in communities. The partnerships are committed to nurture women leaders for social change and gender-just communities. A major area of intervention, close to our heart is the movement protesting violence against women and promoting women safety.

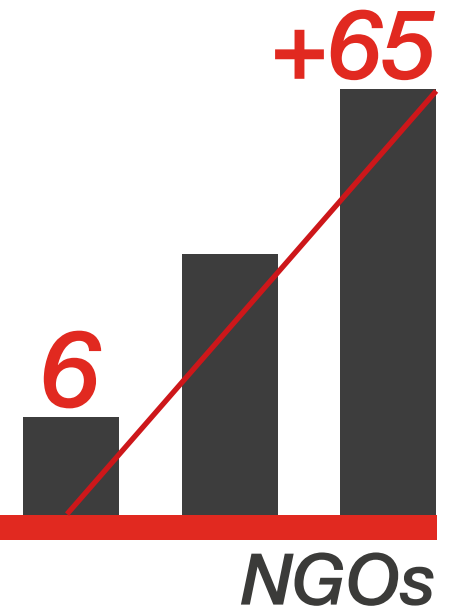
02

INVESTMENTS



GROWTH

GROWTH OVER THE YEARS



+ 2.6
lakhs

Number of beneficiaries has crossed 2.6 lakhs

Total Commitment: ₹ 320 million between 2008 and 2015



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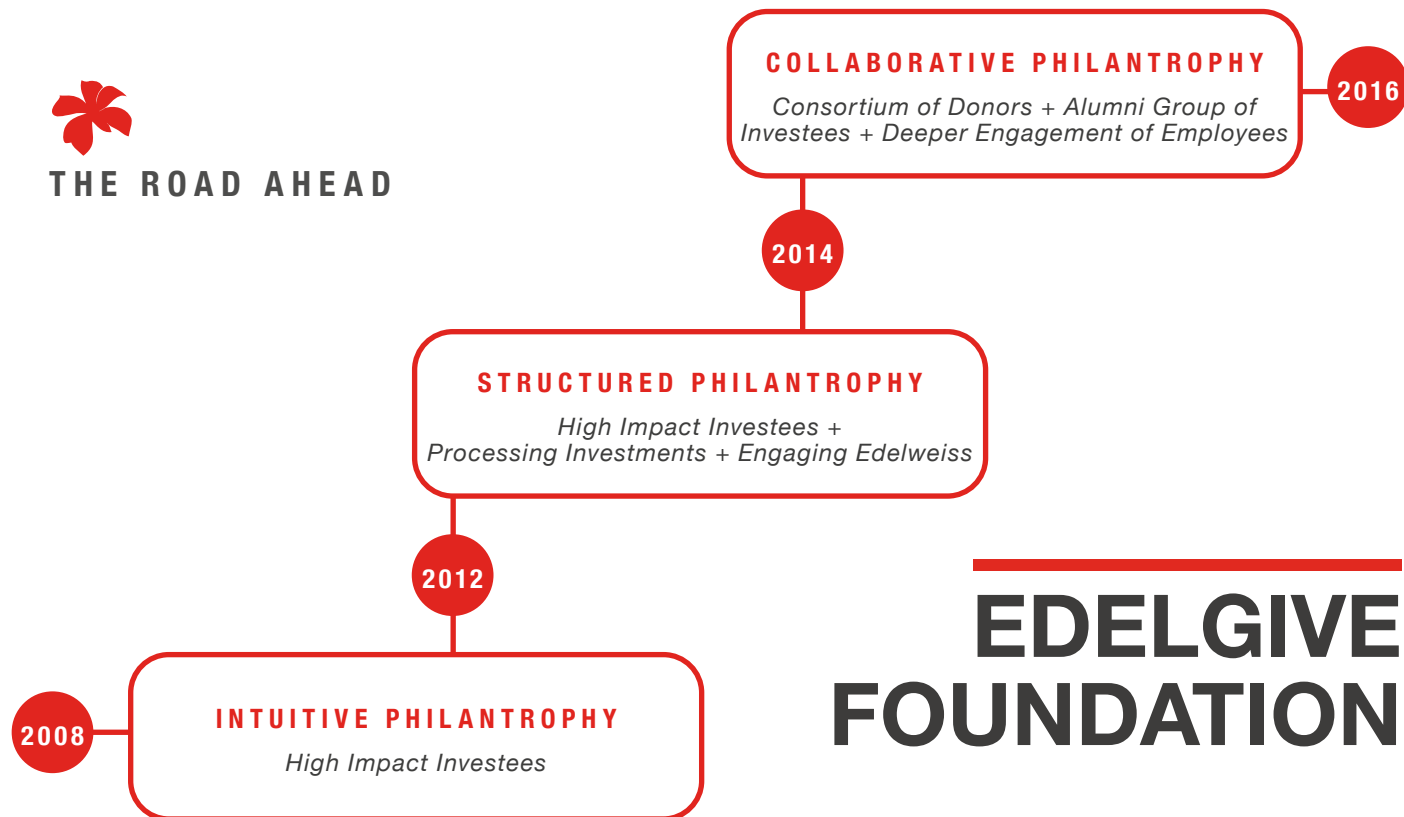
INVESTMENTS



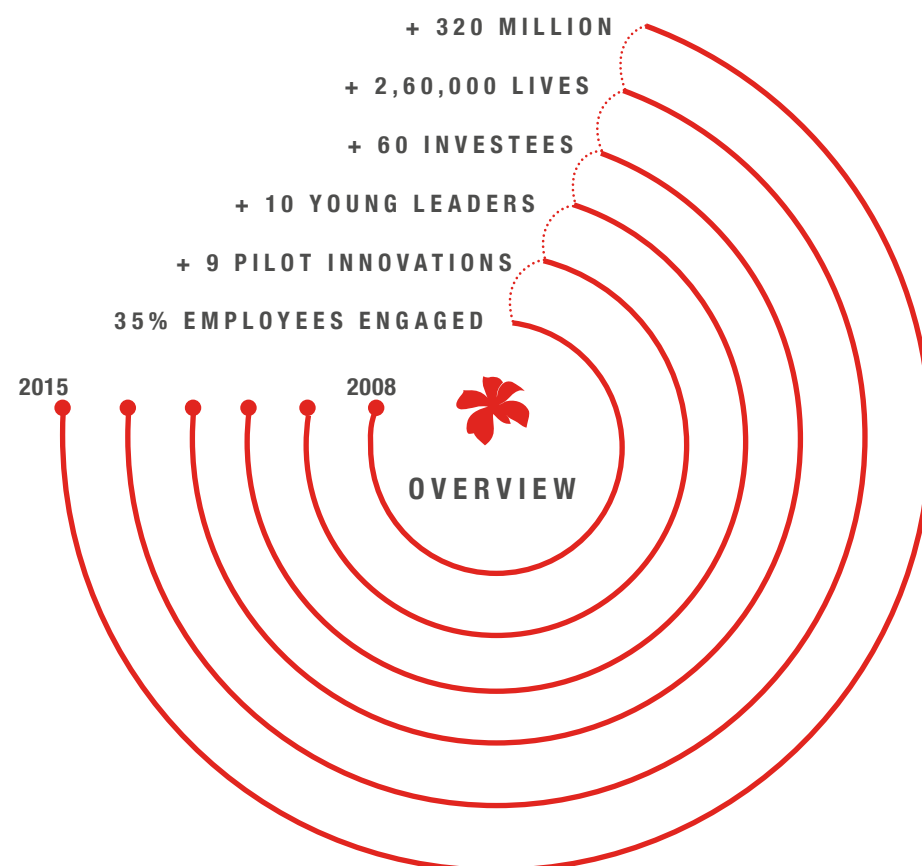
GROWTH



THE ROAD AHEAD



EDELGIVE FOUNDATION



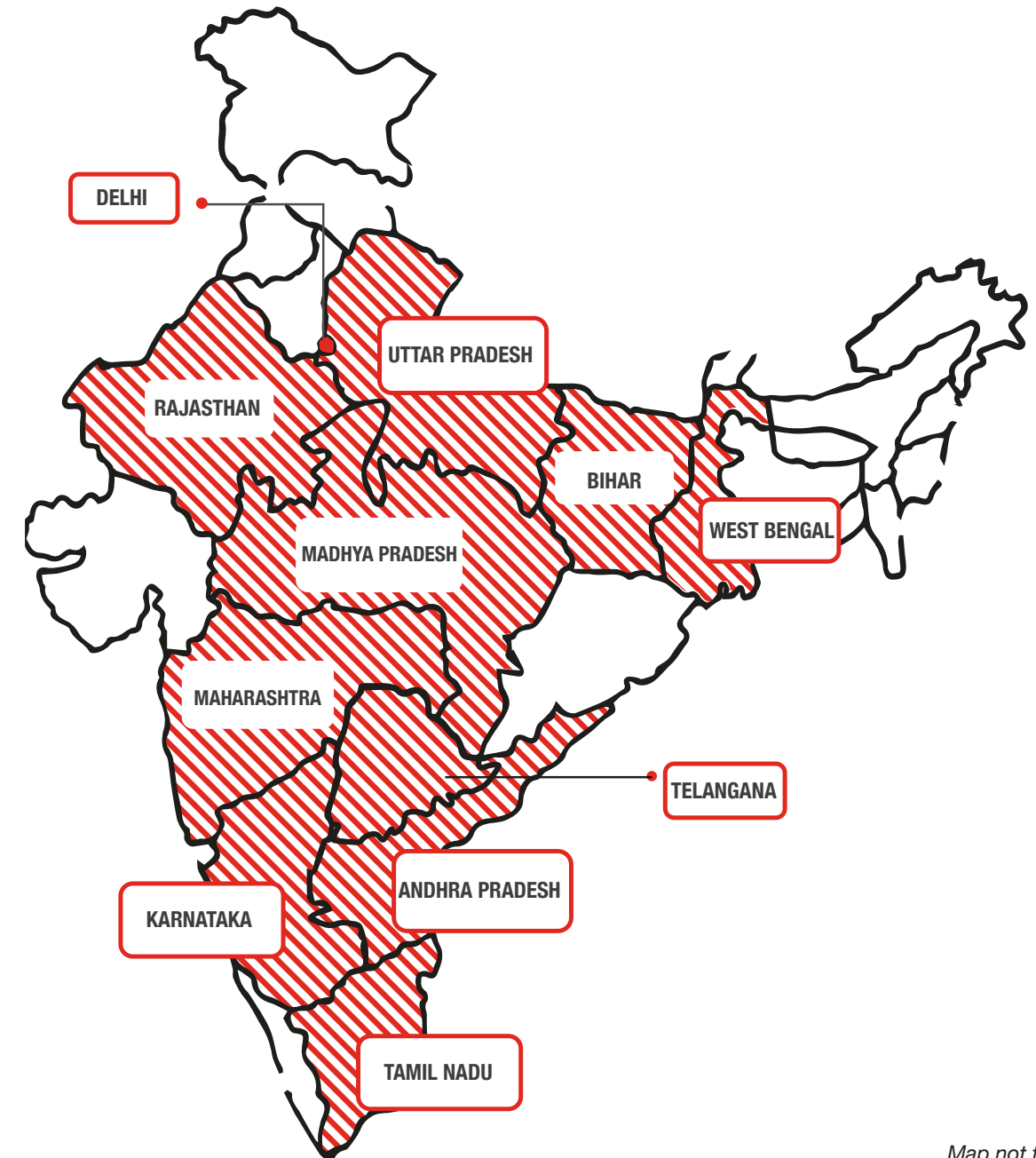
- An organisation that catalyses the entire sector
- A platform where everyone has a voice and all can be heard

02

INVESTMENTS



GEOGRAPHICAL COVERAGE



Map not to scale



NGOs

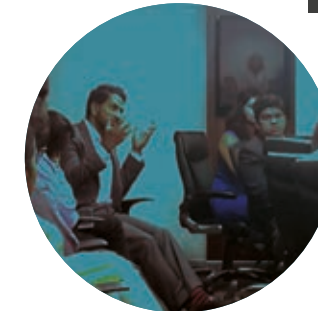
Our partner NGOs share a common feature of having unique and innovative programme models in place which carrying out extraordinary work in their chosen field and location. What sets them apart is their approach towards active community engagement and a holistic development.

**ENHANCING LEARNING OUTCOMES**

- Pre-primary, primary and secondary education
- All round development of children
- Nutrition and healthcare support to children
- Scholarships and assistance
- Language and skills enhancement

**ECOSYSTEM BUILDING**

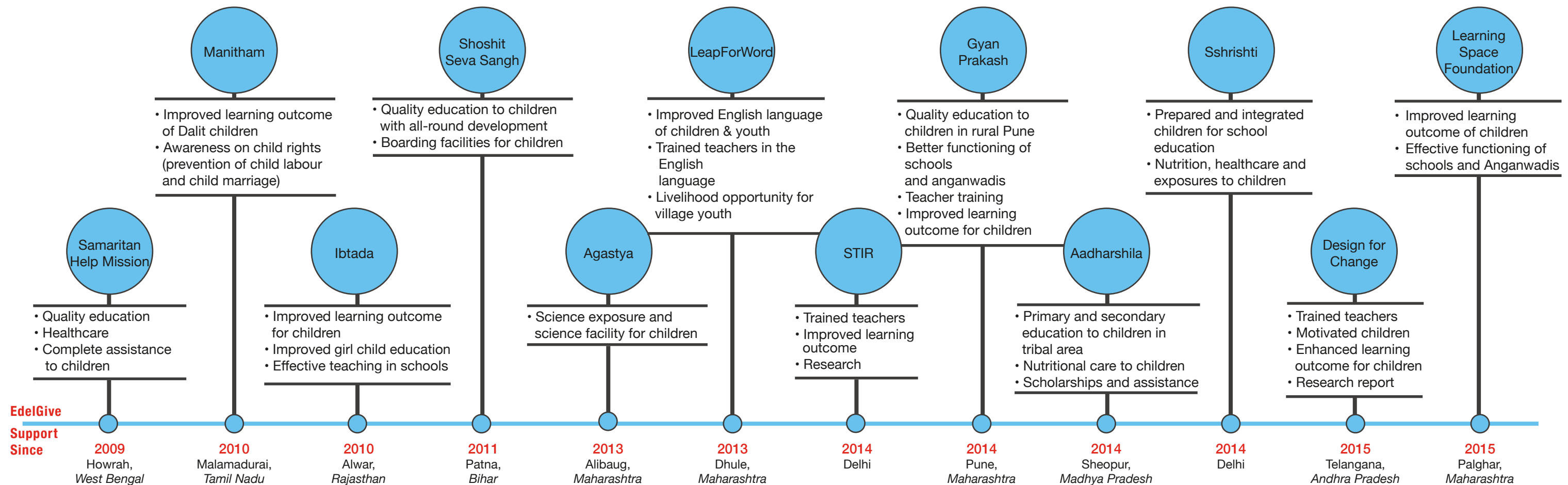
- Effective functioning of schools and anganwadis
- Teacher training
- Girl child education
- Promotion of child rights
- Prevention of child labour and child marriage
- Awareness among parents and community

**INFLUENCING**

- Research and advocacy
- Networking

**NGOs**

Through different projects, we are reaching to dalits, tribals and poor families with access to quality education for children, especially girls in hard-to-reach places. Three of our education projects run fully functional schools with high academic standards, while the others focus on teacher training and community awareness in their local communities, all towards ensuring quality education.





AUGMENTING LIVELIHOOD OPPORTUNITIES

- Enhancing livelihood opportunities
- Enhancing family income
- Financial inclusion for women
- Women work participation
- Migration support services
- Community mobilisation



CONNECTING EDUCATION TO LIVELIHOOD

- Employability for the youth
- Placement services and mentoring



WATER FOR LIVELIHOOD

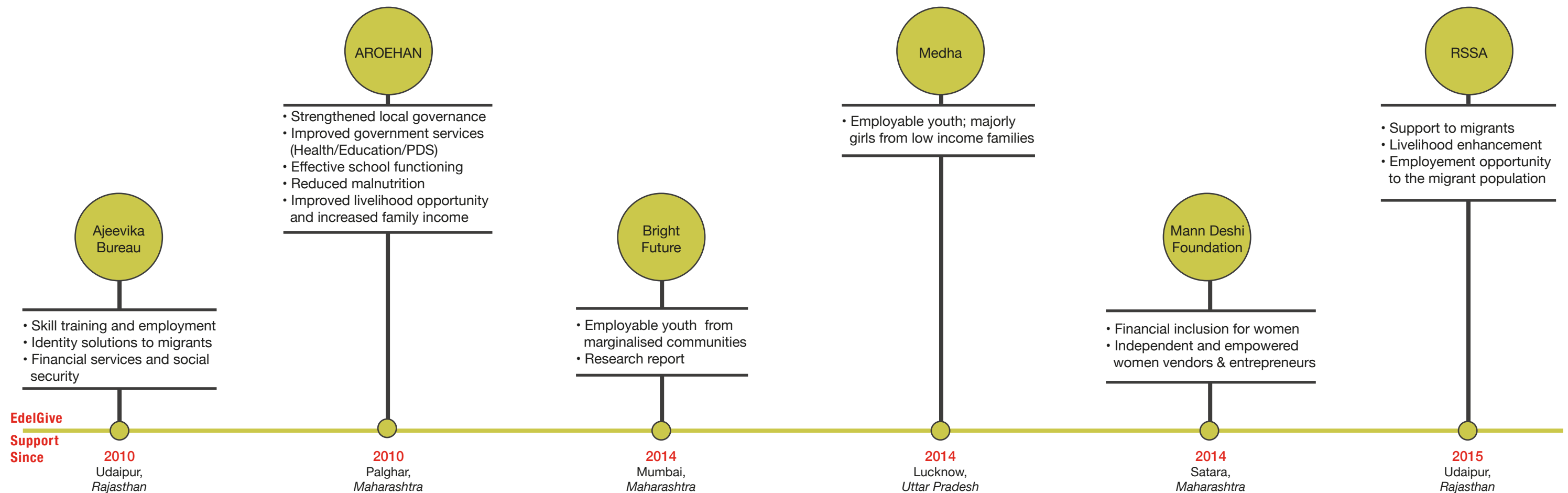
- Improving water availability for livelihood
- Drought mitigation



NGOs

Enhancing livelihood opportunities, increasing household income through sustainable livelihood activities, increasing the women work force participation rate and their financial inclusion and support services to migrant families are specialties of the livelihood portfolio. The NGOs we support are powered by providing career counselling, employability training, placement and support services to the youth.

The inclusion of a few water projects in the portfolio enhances its meaning by reaching out to the communities with interventions for water. We focus on transforming the geographical topography of the location, enabling communities with more livelihood opportunities and mitigating water crisis.



02

INVESTMENTS



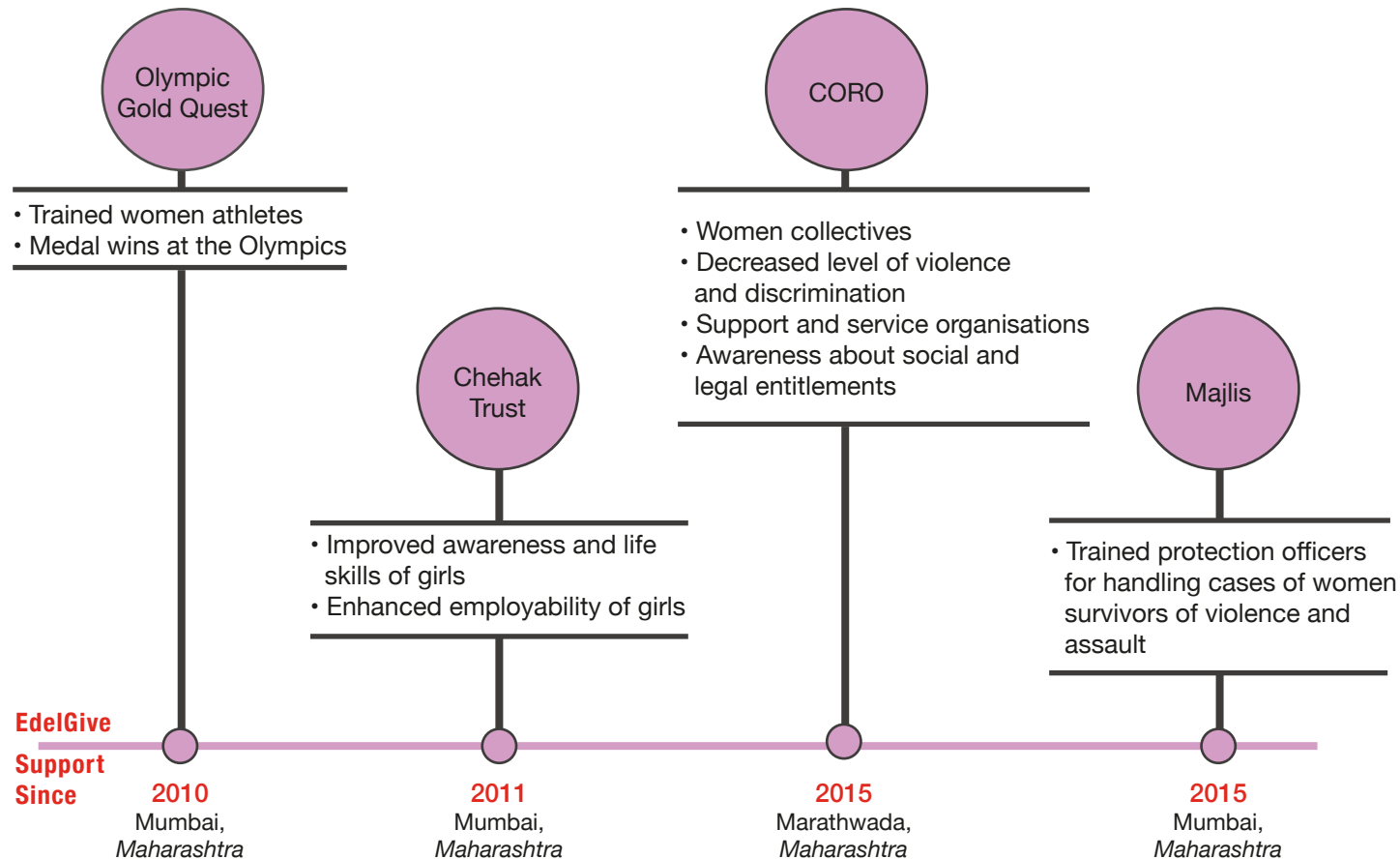
NGOs



WOMEN SAFETY AND PROTECTION

- Women safety and protection from violence and discrimination
- Awareness about government entitlements and services
- Socio-legal support to women survivors
- Women athletes

Through our portfolio of women empowerment, we are engaged in promoting safety and security of girl children and women within vulnerable communities. Our projects focus on prevention of discrimination and marginalisation of women. Our projects have done path breaking work towards preventing violence against women and providing them financial and social support for their empowerment.

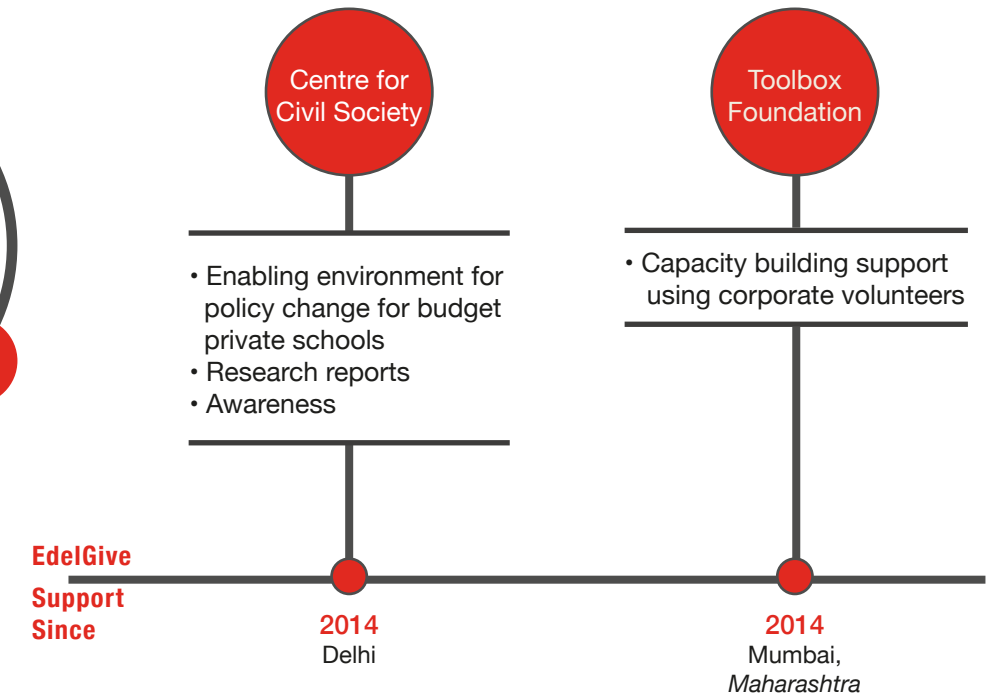


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INVESTMENTS



NGOs



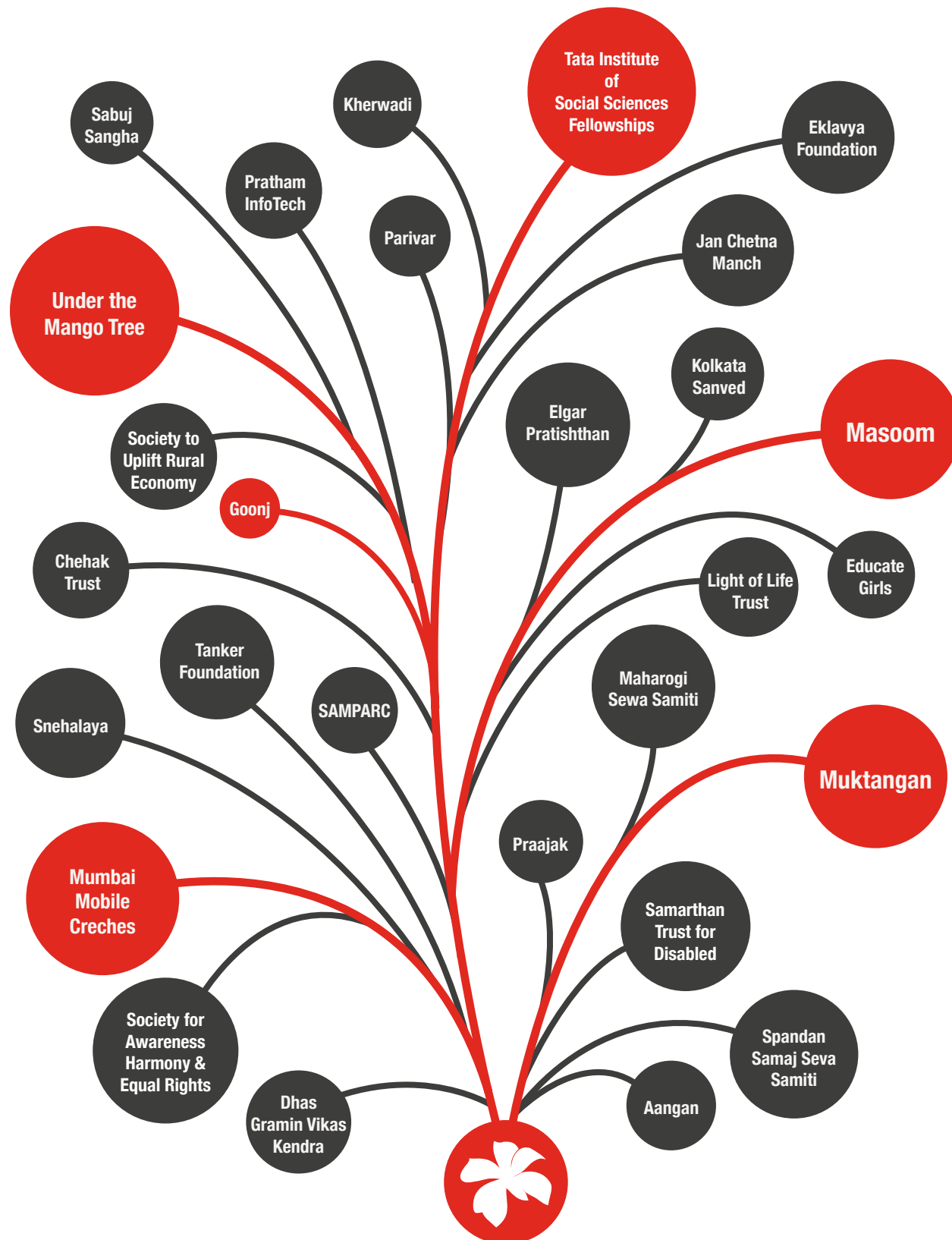
02

INVESTMENTS



ALUMNI NGO LIST

EdelGive Foundation follows the principle of continuous support and thus, our alumni NGOs continue to be an integral part of our portfolio. After the exhaustion of financial support, the foundation continues to be a provider of ecosystem support.



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INVESTMENTS



NGOs SPEAK

TESTIMONIALS



RUPAL KULKARNI
(Rajasthan Shram Sarathi Association)

Shram Sarathi was in its nascent stages when EdelGive Foundation partnered with us and supported various innovative pilots.

EdelGive has constantly been mindful of the evolving needs within Shram Sarathi as it grew over time. In fact, what makes EdelGive's partnership with us unique is their employee engagement programme. Employees of Edelweiss have always demonstrated a long term commitment to building our capacities.

Swati Mathur for instance, has visited us each year to support our changing human resource needs, while Nikhil Johari, now a special invitee to Shram Sarathi's board, is helping us shape internal cost frameworks and give structure to our legal compliance activities. As Shram Sarathi steps into an exciting new period of growth, we truly value our partnership with EdelGive and the diverse range of inputs that its employees and networks support us with.

Our team has grown a lot in the last two years which made it crucial for us to be able to manage the growing team and the ever-increasing work as well. Our association with EdelGive Foundation has enabled us to not just devise a strategic Human Resource Manual for our team, but we also received support to roll out the programme, wherein we deliberated on our roles and responsibilities at an individual level and also how to collaboratively execute the vision of Aadharshila. This proved to be a vital input to institutionalise and streamline our human resource systems.



SYED MERAJUDDIN
(Aadharshila)

02

INVESTMENTS



NGOs SPEAK



AUDREY D'MELLO
(Majlis Legal Centre)

A donor with a difference

EdelGive Foundation has reflected one of the core values that Majlis has always believed in “**doing what it takes**” to **bring about impact and change**. While maintaining the formal role of donor and ensuring accountability of all the commitments Majlis has made, the team has been very forthcoming in offering their support and resources to set up systems and providing referrals to help us maximise our potential and building a stronger organisation.

On behalf of Design For Change (DFC) I would like to extend our deepest gratitude to the entire team at EdelGive Foundation.

EdelGive has been so much more than a funder to us, they have been true programme partners. The team is innovative, genuinely committed and invested in each of the teams they support.

They have not only empowered us to deepen and enrich our work, but have also gone out of their way to enable us share our programme within the extended EdelGive investee family. It is a truly enriching and rewarding experience partnering with EdelGive.



NANDINI SOOD
(Design For Change)

EdelGive has continued to be a special partner for Medha. **They take the time to understand our unique challenges, and look for holistic solutions that enable us to build our organizational capacities for the long run.** We are honored to have their ongoing support and look forward to continuing to work with them in the years to come as we strive to improve employment outcomes for youth in one of the most disadvantaged parts of the country.



CHRISTOPHER TURILLO
(Medha)

03

MONITORING & EVALUATION



03

MONITORING AND EVALUATION

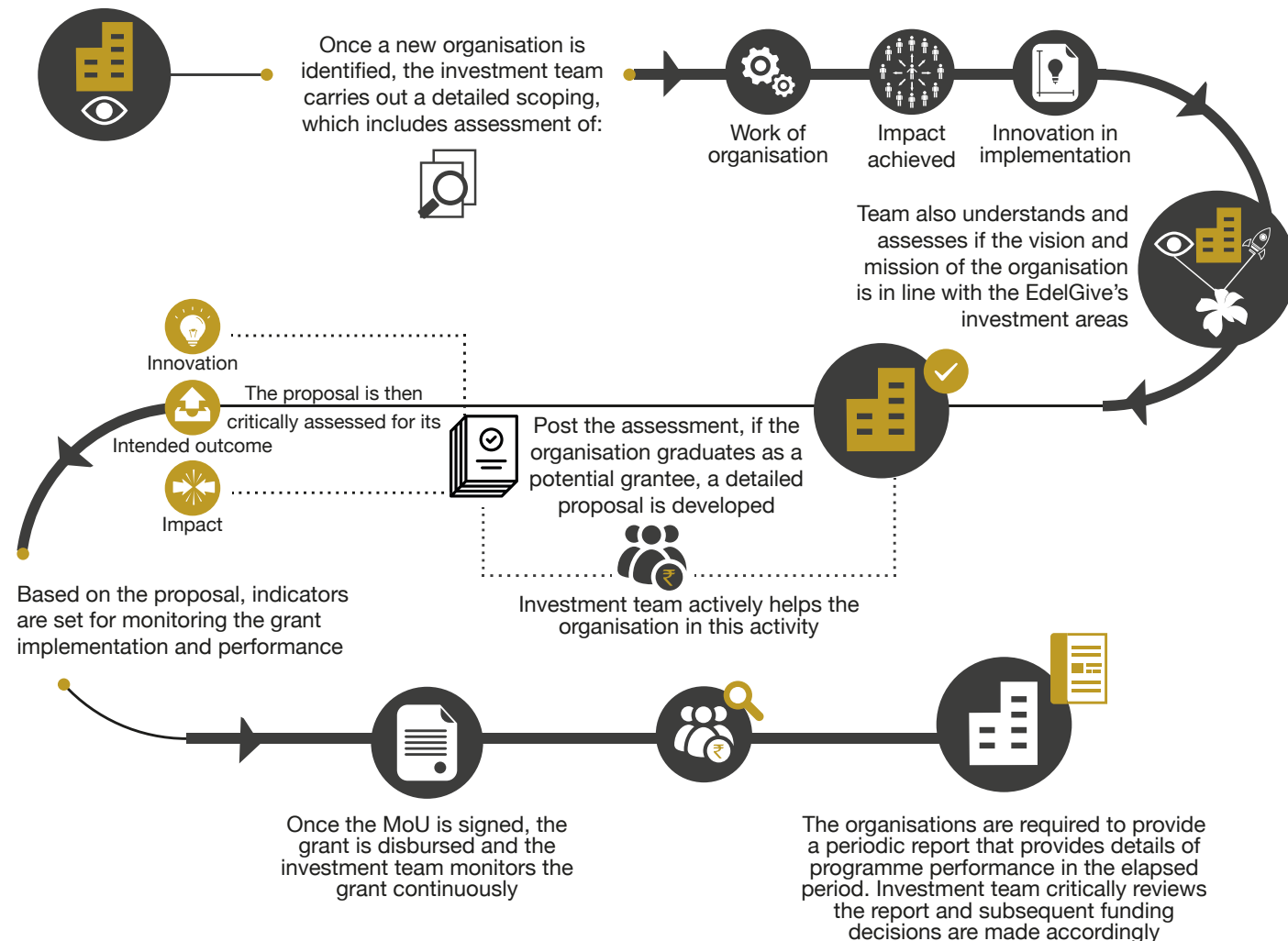
OVERVIEW

Over the years, EdelGive Foundation has developed a well-defined monitoring and evaluation process through which all the activities undertaken by the investees are recorded and timely reviewed.

Although the existing system in place was strong and elaborate, the need to refine the same was inevitable. In line with this realisation, a new method of monitoring and evaluation is being designed. The Foundation will adopt a system based on the principle of Results Based Management (RBM) and in order to maximise the output, the focus is now on strengthening the performance-based funding model.

Going ahead, the new strategy will incorporate a standardised funding and monitoring process wherein, periodic assessment of each element will be undertaken to ensure maximum impact. The review process will encompass the internal and external processes followed by the foundation.

PROCESS



PROCESS

04

EMPLOYEE ENGAGEMENT



04

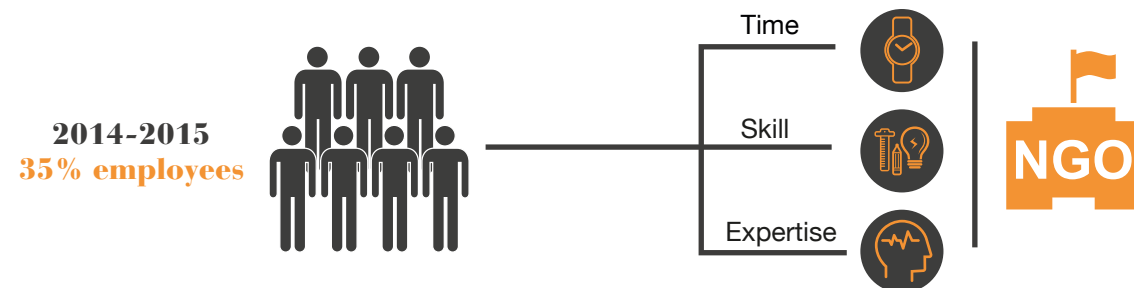
EMPLOYEE ENGAGEMENT

OVERVIEW

EdelGive takes great pride in the vibrant volunteering culture that exists in Edelweiss. Our Employee Engagement Programme offers a structured platform that connects non-profits in need of voluntary support to Edelweiss employees who are inclined towards making a contribution to the social sector.

Employees are encouraged to not only donate in monetary terms but also contribute their time, skills and expertise to the non-profit organisations on a pro-bono basis. Such non-financial support involves direct interaction with the beneficiaries (teaching, monitoring, counselling and group workshops) and requires employees to develop high quality solutions to specific organisational challenges.

This year, we have successfully engaged 35 percent of our employees in philanthropic activities.



With the objective of galvanising high impact volunteering from corporate India and abroad and to fulfil the capacity building needs of investee organisations, we have partnered with Toolbox India in sourcing motivated senior corporate members and placing them with EdelGive grantees to implement high impact capacity building projects. Conversely, Toolbox also facilitates and executes projects with other non-profits in need of support with the help of Edelweiss employees.



VIJAYA BALAJI
(Toolbox, India)

ToolBox India began its association through a strategic partnership with EdelGive Foundation with the purpose of **bringing together the skilled volunteering activities to the EdelGive supported non-profit organisations**. The purpose was to enhance the impact of its non-profit partners through capacity building initiatives, with the goal of making the non-profit self-sufficient in being able to carry forward the changes at the end of this period.

This association has allowed both EdelGive and Toolbox to benefit from each other's strengths with the goal to bring about transformation in the social development sector. The EdelGive-ToolBox partnership has been an exemplar of multi sector collaborations that can develop an ecosystem with immense value for all.

04

EMPLOYEE ENGAGEMENT

OUR MODEL

Establishing a platform for cross-learning has granted us the place of facilitators of inter-connectedness. The Skills Donation aspect of EdelGive's Employee Engagement model takes philanthropy to the next level. Assistance provided to our investees in the form of capacity building has enabled them to first streamline their processes and then expand the level of intervention in the respective field of work.

The Employee Engagement Model has been divided into two segments, that of financial and non financial giving.



FINANCIAL GIVING

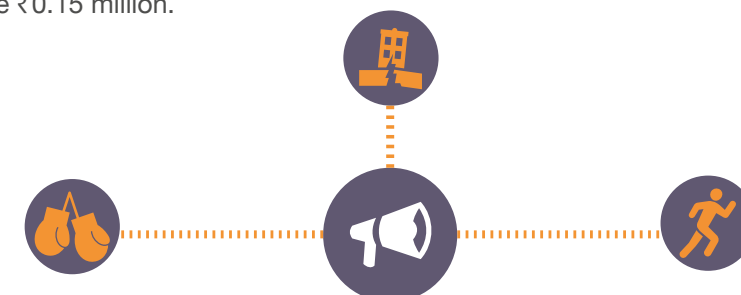
SYSTEMATIC DONATION PLAN (SDP) (PAYROLL GIVING)

Under SDP, different campaigns are run throughout the year to direct employees towards donating to their favourite causes. For instance, the current campaign around SDP routes the donation towards funding yearly food costs for an individual student, via Akshyapatra.



CAMPAIGNS

- A campaign was organised to support Mary Kom's dream of starting a boxing academy in association with Olympic Gold Quest (OGQ), an investee dedicated to supporting promising Indian athletes. This campaign helped to raise ₹ 0.35 million in a month.
- During the Nepal earthquake crisis, our employees contributed a staggering ₹.75 million within two weeks towards relief and rescue activities.
- In 2014, the Mumbai Marathon fund raising drive, comprising of a team of 70 employees, came together on a common platform to raise funds and pledge their support for a great cause. Over 1500 employees contributed to this, helping raise ₹0.15 million.



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EMPLOYEE ENGAGEMENT



OUR MODEL



NON FINANCIAL GIVING

EDELMENTOR

EdelMentor is a mentorship initiative by the foundation which was extended to and customised for the senior members of the Edelweiss family. The investees that required expert guidance in any of the activities were identified and the necessary skills were matched with a member from Edelweiss. This merged the pro-bono effort and the needs, resulting into an efficient relationship.

EDELMENTOR - STORIES OF INSPIRATION

LEAP FOR WORD



SACHIN JAIN
Executive Vice President,
Prime Brokerage Services

In the last three months that I have been associated with LeapForWord, I got a chance to understand an incredible model by Mr. Pranil Naik focusing on enhancing English language skills among children and youth hailing from the under-served communities. *The passion that Pranil and his team have shown towards the cause was indeed the reason why I got involved in the mentoring programme, spearheaded by EdelGive.* Through all the interactions that I have had with the LeapForWord team, I realised that they have many great ideas as also the capacity to execute them, but what was lacking was a time bound strategy to scale-up their existing projects to be able to impact a larger number of beneficiaries.

I tried to give my inputs in terms of arriving at a focused objective and staying true to it and improving the sustainability of their model. It was very interesting to be closely associated with a team functioning with such zeal and fervour for an initiative which is a perfect example of using the widely available technology to impart the essential skill set of English language to children.

Essentially for any organisation in the social sector, it is crucial to not lose their raison d'être, while deliberating scaling up operations. I tried to make the team undertake this approach for all their endeavours through my association with them. From the six-year long field experience, the NGO has indeed created an enormous impact in its work area and I hope my inputs will assist them in collectively taking forward their vision, while staying on-track with their existing project areas.

04

EMPLOYEE ENGAGEMENT



OUR MODEL

CAPACITY BUILDING

Beyond financial support, NGOs require expertise and advise on certain operational area which are critical for achieving overall effectiveness. EdelGive identifies the need for such support and works to suitably fulfill the same by leveraging the proficiencies of Edelweiss employees.

Some examples of EdelGive's work with current NGO's and alumni on capacity building are:

- The Business Solutions Group at Edelweiss developed an MIS tool for The Aangan Trust and NGO Majlis
- Strategy, Business Plan and M&E matrix for Samaritan Help Mission was developed by senior management at Edelweiss
- Financial model and mentorship for Rajasthan Shram Sarathi Association (Udaipur)
- Capsule sessions conducted on Human Resource management, Marketing, Information Technology, Administration by Edelweiss volunteers for students from NGO Bright Future
- Workshop conducted by HR team at Edelweiss for NGOs REAP, FSC and SBP on goal setting and performance management
- Workshops conducted on presentation skills and spreadsheet training for staff members from NGO SNEHA

ADHARSHILA



For me, Goal Setting and Performance Management workshop for the NGO Adharshila was one of the most meaningful and satisfying one. It was wonderful to work with the shared dreams of the whole group, aspiring to change the education landscape. I was immensely touched by the purity of the thinking and boundary-less aspiration by a group. Set of young teachers thinking through all the facets of building a great educational institute. They might not have education and experience we generally find in our schools, but they have a clear vision.

PAPIYA BANERJEE
Chief Human Resources Officer

What I really like about EdelGive is that even if one cannot donate in monetary terms, one gets the opportunity to give back to the society through capacity building and volunteering. I am passionate about children's issues and education and since EdelGive works in these areas, I grab every opportunity I get to volunteer. I like how all our assumptions about different social issues fall apart after watching the ground reality through these field visits.



CHIRAG GANATRA
Manager, Ecap Equities Limited

04

EMPLOYEE ENGAGEMENT

OUR MODEL

STORIES OF INSPIRATION

BRIGHT FUTURE

The last two and a half years that I have been involved with EdelGive, has made me a more humble and grounded person. I have been doing capacity building for children from NGO Bright Future. Their passion completely baffles me and those two hours that I spend every week with these kids; help me get rid of my entire week's stress.



SAKSHI CHADDHA
Manager, ECL Finance Limited

SAMARITAN HELP MISSION



VINIT KUMAR
Senior Vice President,
Balance Sheet
Management

I joined Edelweiss a year ago and one of the distinctive aspects that captured my attention early on is the **focus and prioritization towards EdelGive Foundation in the overall scheme, seen not merely as an extension of the Corporate Social Responsibility (CSR) but a crucial part of the ethos that drives the organisation.**

Having been involved in various social initiatives in the past, either directly or indirectly, there was now an opportunity to leverage my years of experience in the industry at both operational and strategic levels. Further, my interest was also towards having NPOs and other charitable organizations build sustainable models that can help them iterate their own vision for years to come. It is with this in mind, that I opted for the capacity building initiative through EdelGive.

Given that the assignment was focused on building a long term strategic plan for a very active and noble initiative in Kolkata, the experience itself allowed for remotely guiding the work through periodic exchanges via mails, conference calls and meetings, in a time efficient and effective manner, supported by the Toolbox on-site team. Moreover, the financial models used, gave insight into the issues and deliberations at a very primary level. This allowed us to formulate discussion points that would help the NGO take their stellar work to new heights. **This was path breaking at both a personal level as well as for the NGO involved and further re-enforced the secular objectives for EdelGive remain entrenched in delivery of value to entity and self.**

04

EMPLOYEE ENGAGEMENT

OUR MODEL

FIELD VISITS

Field visits not only enable volunteers to understand the work of the NGO at the grassroots but also gives them an opportunity to spend an interactive day with the beneficiaries. Groups of employees are regularly taken to various NGOs to give them a chance to productively contribute towards their work.

Under the Mango Tree Field visit to Beehive Farms at Valsad

A group of Edelweiss employees travelled to Valsad, Gujarat to visit the UTMT (Under the Mango Tree) beehive farms. The day was spent to understand the beekeeping and honey extraction process. They also learnt about the alternate farming mode that beekeeping is turning out to be, that supplements farming and provides 20-40 percent added yields for the farmers in one year.

Dam Inauguration Event at AROEHAN

Edelweiss employees attended the dam inauguration ceremony at Mokhada, Jawahar in the midst of government officials and the village community. EdelGive's support to AROEHAN in the construction of the dam has provided 100 families in Adoshi village access to water thereby enhancing their livelihood to a significant extent.



I have always had a great experience in EdelGive activities and every time I learn something new. I have gone for many visits with EdelGive, like Mid-Day Meal programme visit, school visits in rural areas etc. where we get hands-on experience of dealing with different issues which earlier, we were not even aware of. I happily spend my Saturdays for EdelGive activities as my personal take away and learning from them is quite a lot.

RUTU CHARAN
On Boarding Officer, Edelweiss Broking Limited

It has been less than a month since I have joined Edelweiss and I was delighted to receive the invitation for the field visit to Wada to the Learning Space Foundation and the primary school run by them. We got to interact with the local Warli artists and how the warli art is now being appreciated globally. We left with the thought as to how to bridge the gap between urban and rural India and how vital was the role of education in shaping the future of villages. I hope we are able to contribute in any way possible to the villages of India and also give a chance to every child to have access to basic education which will surely help in the years ahead of them.

TOSHAM SINDHU
Distressed Assets Resolution Group



04

EMPLOYEE ENGAGEMENT

OUR MODEL

EVENTS

EdelGive hosts various events throughout the year to support different NGOs and causes.

Diwali celebrations with Joy of Giving Week

Edelweiss Branches across India took up causes close to their hearts from arranging blood donation camps to visiting NGO centres, Swacchata Abhiyaan and tree plantation drives to celebrate the Joy of Giving Week. A Diwali Bazaar was held at Edelweiss House to promote and sell the products prepared by the women and children of the NGOs.

MAD month at Edelweiss House

EdelGive organised a fun-filled MAD Month for Edelweiss employees, in association with the NGO Make a Difference (MAD). Employees participated in workshops like photography and dance to raise funds for contributing towards children's education.

Blood donation camps

In support of Tata Memorial Hospital and Green Cross Blood Bank, a blood donation camp was hosted at Mumbai, Ahmedabad and Delhi Offices, in aid of cancer and thalassemia patients.

Pinkathon International Run

More than 100 women from Edelweiss registered to run for Pinkathon which is a multi city 10 KMs International Run for women. The objective of the event was to encourage women's health and fitness.

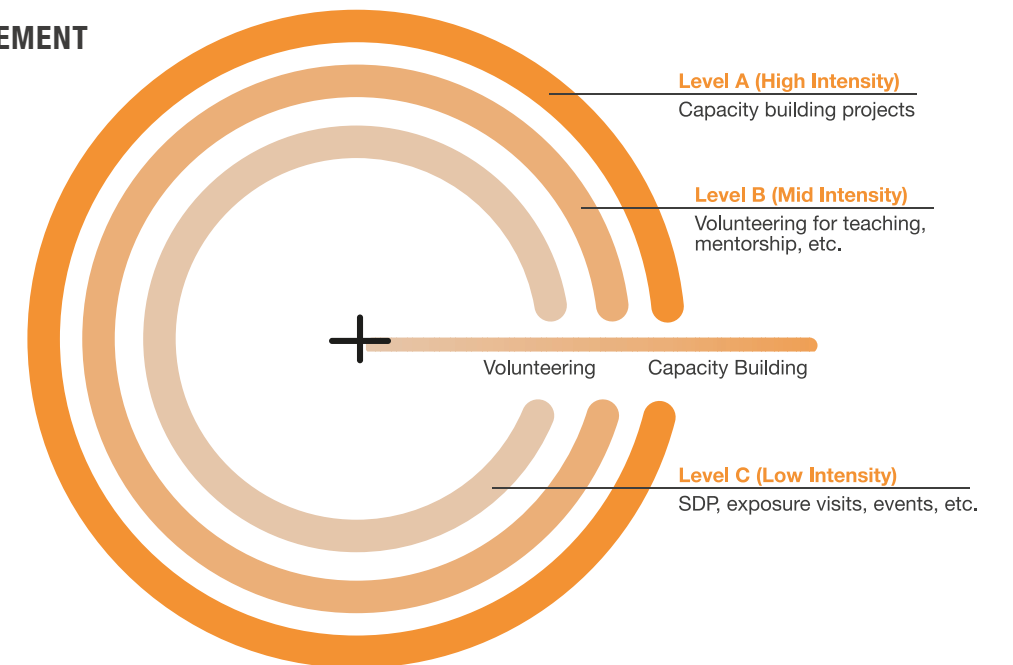


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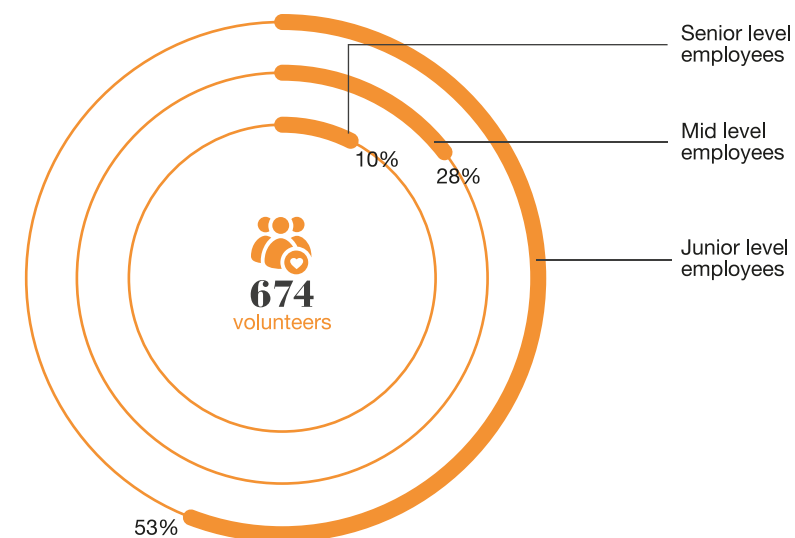
EMPLOYEE ENGAGEMENT

OUR MODEL

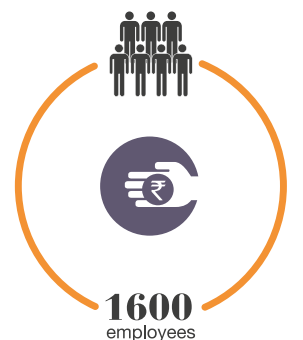
LEVELS OF ENGAGEMENT



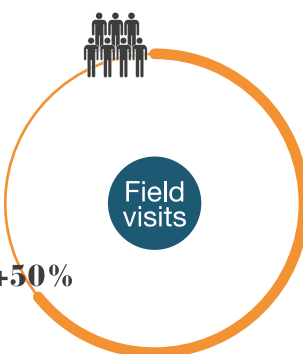
THE RESULTS



Total number of volunteering for financial year was 674 of which 53% came from junior level employees, 28% from mid-level and around 10% from senior level employees



No. of employees engaged through financial giving has been 1600 in 2014-15



More than 50% of our volunteering man hours came through field visits

Together we had about 35% of the organization engaged with around 1800 man hours invested into volunteering opportunities



05

PARTNERSHIPS



05 PARTNERSHIPS

OVERVIEW

EdelGive Foundation has set out to establish itself as a facilitator for smooth sharing of information within the donor-community and the social sector as a whole. We believe that no entity exists in isolation and each of them requires an ecosystem to function to its fullest capability and we are working towards being an effective mediator between the for-profit and the not-for-profit world.

OUR ROLE

AN AGGREGATOR

We invest collectively the funds amassed from High Net worth Individuals and the corporate, in high-impact and credible NGOs.

AN ADVISOR

As advisors, we work towards sharpening the philanthropic goals and plans of individual donors and the corporate while also assisting them in compliance as well as designing an effective strategy for financial and non-financial giving.

REFERENCE PARTNER

We refer effectively working, excellent NGOs to interested donors after thoroughly understanding their philanthropic mandate.

PARTNERS SPEAK



CYRIL DAVID
CEO, Volkart Foundation

Our relationship with EdelGive Foundation has been that of a partner in the process of social development and the betterment of the communities. As a partner, we are very comfortable working with the organization and the team. All the processes are very transparent which has given us a trust factor to work with them.

We also look at EdelGive as a leader in the field and have taken up a few of their processes for screening and implementation into the Volkart foundation system. This has helped us to streamline our own processes and practices which has benefited us.

05

PARTNERSHIPS



PARTNERS SPEAK



VICTORIA DUNNING
*Executive Vice President,
The Global Fund for Children*

EdelGive Foundation and the Global Fund for Children share common values when it comes to strengthening India's civil society. The Global Fund for Children finds and supports small, locally led organizations that transform the lives of the world's most vulnerable children, and EdelGive has been an invaluable referral partner for us. EdelGive's venture philanthropy approach combined with its strong, tailored, non-financial support to investees empowers local change leaders to create sustainable social impact. We are proud collaborators in this vital mission.

EdelGive is a strong partner in India for EMpower – The Emerging Markets Foundation. We have had a mutually engaging and enriching relationship with regards to potential grantee partners, and made useful cross-referrals. We share a focus on adolescent girls and appreciate working together and with other colleagues to strengthen the landscape so girls have more opportunities to thrive and lead. As a testament to our regard for EdelGive's professionalism, EMpower invited EdelGive's CEO to speak on an international panel that EMpower organized on emerging markets philanthropy, and also asked a former EdelGive senior staff member to join our Board of Directors. We look forward to continuing this relationship with a strong colleague foundation, to strengthen strategic philanthropy in India and most importantly, to create positive change for adolescent girls.

NISHA DHAVAN
*Programme Officer, India
EMpower*

What strikes us most in our work with EdelGive is that they go far beyond a simple beneficiary-donor relation and build true partnerships with selected NGOs. They engage with 'money, mind and heart' in a long-term commitment towards their partners, supporting them not only in projects but helping them build and strengthen their organizations. We are at the outset of our relationship with EdelGive and we are looking forward to expanding our co-operation with them, as our strong Indian partner on-site.

YONCA EVEN GUGGENBÜHL
President, Dalyan Foundation
SUSANNE GROSSMANN
Managing Director, Dalyan Foundation

06

EDELGIVE INITIATIVES





AT THE SAME TABLE

At The Same Table is a platform for discussion between investees and donors, while also being an opportunity for organisations to deliberate on their role of going beyond the cheque book. This forum enables donors to talk about their achievements, issues they grapple with or experiences they would like to share.

The donors around the table are motivated to share ideas that have helped them solve issues effectively while also showcasing the successes experienced by them. The issues under discussion at this forum are chosen in consultation with the participants.

This is an attempt at debating issues that may seem complex, by bringing together providers and users of resources. The confluence of both is expected to harness a stronger relationship between the different participants and aims to meet every two months.

EDGE, 2014

EDGE is a journey of collaborative philanthropy with participation from exceptional grassroots organizations, corporate, philanthropist and social development experts. This annual engagement platform attempts to understand the challenges faced by our partners and hence facilitate discussion, insight-sharing in the true spirit of collaboration.

Our experience over the last seven years has convinced us that such engagement platforms definitely give an edge to our partners to be ahead of their issues and challenges. This year, we had 25 NGO leaders, funding and resource partners, creating an exciting opportunity to understand real-life challenges that we face as stakeholders in the development process.

EDGE was a great opportunity to network with like-minded grassroots leaders of the development sector and share not only our experiences but also our challenges and struggles. All the credit goes to the EdelGive team for designing the event in such a way that it brought out the thoughts, ideas and experiences of all the participants on a common platform in an efficient, thoughtful and succinct manner.



BYOMKESH MISHRA,
MEDHA LEARNING FOUNDATION

EdelGive Impact Workshop 2014





INDIA NGO AWARDS

EdelGive Foundation has been associated with India NGO Awards for the past three years. This initiative launched by the Rockefeller Foundation in association with Resource Alliance has proved to be an encouraging platform for non-profit organisations engaged in path-breaking work. The awards aim to advance the country's not-for-profit sector by promoting financial and organisational sustainability and strengthening community support of civil society.



EDELGIVE TEAM

THE EDELGIVE TEAM



EDELGIVE MEMBERS



VIDYA SHAH, CEO

Vidya gives strategic direction to EdelGive and drives it towards achieving the larger goal of bringing the for-profit world closer to the not-for-profit arena. Under her leadership, EdelGive has grown from being engaged in intuitive and structured philanthropy to following a model of collaborative philanthropy.



In addition to being a board member of Edelweiss, she is part of the board for various prominent organisations like Agastya International Foundation, Asian Venture Philanthropy Network, Common Purpose, Women on Wings, Toolbox India Foundation and Masoom. She worked for 11 years in the investment banking sector and later as the CFO at Edelweiss Financial Services, for seven years, before setting up the EdelGive Foundation.



NAGHMA MULLA, COO

A Chartered Accountant by profession, Naghma works towards creating and maintaining a sustainable philanthropy network to support the EdelGive investee portfolio with the funder community. She is responsible for and heads the three divisions at EdelGive, namely Investment and Programmes, Fundraising and Partnerships and Employee Engagement Programme.

In addition to ensuring smooth organisational processes, she is also responsible for strategizing and promoting collaborations between different stakeholders in the social space i.e., the NGOs, the donors, Edelweiss employees and the corporate.

The team undertakes programme analysis and due diligence for existing and prospective investments under the three areas of intervention; education, livelihoods and women empowerment. Their responsibility extends to assisting the NGOs in their activities by continuous hand-holding at every stage of programme implementation.

INVESTMENTS
&
PROGRAMMES



AHMADULBARI

*M.A. in Social Work - Tata Institute of Social Sciences, Mumbai
B.Sc in Industrial Chemistry - Aligarh Muslim University, Aligarh*

Previously worked with New Concept Information Systems, New Delhi for research, documentation and communication on social development issues. At EdelGive, Ahmad is responsible for the women empowerment portfolio.

THE EDELGIVE TEAM



EDELGIVE MEMBERS



KAREN FERNANDES

*P.G.D.M in Finance - Chetna Institute of Management & Research, Mumbai
B.Com - H.R. College of Commerce and Economics, Mumbai*

Prior to joining Edelweiss, she worked with PricewaterhouseCoopers Pvt. Ltd. as an analyst in the Tax and Regulatory Services. Her role at EdelGive revolves around ensuring effective management of the Education portfolio.

VINEETH KOSHY

*M.A. in Social Work - Tata Institute of Social Sciences, Mumbai
B.Com - Gujarat University*

Manages the NGOs under the Livelihoods section and has earlier worked on projects for JSW Steel, UNICEF and the National Rural Health Mission in the development sector. He is responsible for managing the Livelihoods portfolio at EdelGive.



VIJAYATA VERMA

*M.A. in Social Work - Tata Institute of Social Sciences, Mumbai
B.Ed & B.Sc - Delhi University*

Having worked in the disability sector with Action for Ability Development and Inclusion (AADI) she holds the responsibility of scoping for new NGOs and assisting in the investment stage and supporting the due diligence process. Her role is to streamline the pre-investment stage and provide a strong base for going ahead with an investee.

MONITORING
&
EVALUATION

The Monitoring and Evaluation Team is responsible for designing technically sound tools for streamlining the assessment processes followed by EdelGive. In addition to supervising the activities of partner NGOs, they also work towards putting in place a hassle free data management system.

ATUL R. GANDHI

*M.Sc. (Statistics), Masters & Ph.D. in Population Studies -
International Institute for Population Sciences (IIPS), Mumbai*

With over 10 years of experience with the UNSAID, Aga Khan Foundation, Bill & Melinda Gates Foundation and The Global Fund, he is presently spearheading the Monitoring and Evaluation processes at EdelGive and is engaged in devising and implementing effective assessment tools.



THE EDELGIVE TEAM



ARPITA ROY KARMAKAR

M.Sc and B.Sc in Economics - University of Calcutta

Previously worked with organisations like Hippocampus Learning Centre, Naandi Foundation and the Kaivalya Education Foundation. At EdelGive, she helps in streamlining the Monitoring and Evaluation processes and also handles core investee development projects with EdelGive investees.

The Employee Engagement Segment of EdelGive covers the planning and implementation of employee volunteering programme along with designing the internal communication strategies and projects on capacity building for the EdelGive associated NGOs. The employees can opt for field visits, monetary donation and capacity building, all of which is organised by this team.

**EMPLOYEE
ENGAGEMENT**



PRITI JASWANEY

*B.M.S - HR College of Commerce and Economics, Mumbai
MBA in Marketing - Narsee Monjee Institute of Management Studies*

She has worked as a Human Resource Business Partner with Edelweiss Financial Services for 5 years. Priti spearheads the Employee Engagement Programme under EdelGive and initiates capacity building projects along with monitoring the flow for internal communication.

MADHURA KARAMBELKAR



*P.G.Diploma in Comm. for Development - X.I.C., Mumbai in association with UNICEF
B.A. in Economics - Ramnarain Ruia College, Mumbai*

She has worked on projects with NABARD and Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ). She handles the Social Media Management for EdelGive along with designing communication collaterals for the foundation and assists in the effective execution of Employee Engagement activities.

PARTNERSHIPS

It is essential to strengthen the relations within the donor community as well as the social sector and under Partnerships; it is ensured that there is a continuous inflow and outflow of information.

VISHAKHA GUPTA



*P.G.Diploma in Comm. for Development, X.I.C., Mumbai in association with UNICEF
B.Com in Financial Markets, SIES College of Commerce and Economics, Mumbai*

Vishakha has worked on projects with NABARD and Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) and she was earlier a part of NGO VideosForKnowledge, working in the education sector. She looks after external communications and assists in maintaining relations with EdelGive's partners.

EDELGIVE MEMBERS

ADVISORY COMMITTEE



ADVISORY COMMITTEE

SHABNAM PANJWANI,
CHIEF MARKETING
OFFICER

Shabnam has been the driving force behind building the Edelweiss brand.

Edelweiss Financial Services Ltd.



DEEPAK MITTAL, MD & CEO

Edelweiss Tokio Life Insurance Company Limited

With over two decades of experience in the financial services sector, Deepak heads the Edelweiss Group's Insurance business.



Ravi heads the Credit and Fixed Income business group at Edelweiss.

ECL Finance Ltd.

RAVI BUBNA, MD & CEO
CREDIT & FIXED INCOME



NITIN JAIN,
CEO - GLOBAL ASSET &
WEALTH MANAGEMENT

Edelweiss Financial Services Ltd.

Nitin heads the Global Asset and Wealth Management segment at Edelweiss, which also includes the Retail Broking Operations.

ADVISORY COMMITTEE

Nikhil has more than 12 years of experience spanning over Global Risk, Corporate Planning and Strategy, and Treasury Operations groups of Edelweiss. He oversees risk, compliance, technology, MIS, operations, treasury, legal, and HR functions within the Commodities SBU.

Edelweiss Financial Services Ltd.

NIKHIL JOHARI,
EXECUTIVE VICE
PRESIDENT CORPORATE



HARISH SHARMA,
HEAD- BROKERAGE & ADVISORY
SERVICES, GLOBAL WEALTH
MANAGEMENT

Edelweiss Financial Services Ltd.

Harish has over 15 years of work experience in Capital Markets and has spent over 8 years in research across sectors such as IT, Auto Components, Mid-caps, Infrastructure (ports, railways, mining, real estate, logistics). He co-headed Research at Edelweiss, post which he went on to set up the Hedge Fund Sales Desk for the organization.

Venkat, co-founder of Edelweiss Company, spearheads some of the Company's most strategic businesses including Investment Banking and Alternative Assets Advisory.

Edelweiss Financial Services Ltd.

VENKAT RAMASWAMY,
EXECUTIVE DIRECTOR



SACHIN JAIN,
EXECUTIVE VICE PRESIDENT,
PRIME BROKING

Edelweiss Financial Services Ltd.

Sachin Jain heads Prime Brokerage Services and has been with Edelweiss since 2006. Sachin is a qualified CA and comes with over 17 years of work experience in the financial sector.



VIBHOR GUJARATI,
ASSOCIATE DIRECTOR ,
GLOBAL ASSET MANAGEMENT

Edelweiss Financial Services Ltd.

Vibhor has more than 15 years of experience in B2B and B2C with key focus on Business Development, Business Strategy, Fundraising, Marketing, Distribution, Investor Relationship and Client Servicing. At Edelweiss, he is one of the key member in setting-up of Alternative Investment Funds Onshore Business and at present is Heading India Marketing for Edelweiss Global Asset Management. By nature, he is philanthropist and is also involved in several CSR activities.



JOIN THE CAUSE

If you want to either partner with us or find out how to get involved, contact us through the following means:



edelgive@edelweissfin.com



022-40094600



www.edelgive.org



The EdelGive Foundation



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