Developing Funding Strategies for Nonprofit Organizations

Owen Ferrara, Trevor Karrett, Luke Reid

Interdisciplinary Qualifying Project Supplement: Cycling Without Age Team

Worcester Polytechnic Institute

Project Advisors: Professor Holly Ault and Professor James Hanlan

October 11, 2019
Supplementary Resources

Contents
Supplementary Resources ........................................................................................................... 2
Section 1: Consent Form for Survey ......................................................................................... 3
Section 2: Survey Send Out Email ............................................................................................ 6
Section 3: Chapter Survey ........................................................................................................ 6
Section 4: Survey Implementation/Statistical Information ...................................................... 8
Section 5: Interview Consent Form .......................................................................................... 11
Section 6: Chapters with Trishaw Funding Interview Questions ............................................. 13
Section 7: Chapters without Trishaw Funding Interview Questions ......................................... 15
Section 8: National Chapters Interview Questions ................................................................. 17
Section 9: PricewaterhouseCoopers (PwC) Interview Questions ............................................. 18
Section 10: American Heart Association (AHA) Interview Questions .................................... 19
Section 11: Project Shared Google Drive Guide ...................................................................... 21
Section 12: Further Explanation on NPO Funding Models from the Stanford Review Study ... 25
Section 13: More Information on Foundation Funding ............................................................ 25
Section 14: Difficulties in Forming Partnerships ................................................................. 26
Section 15: Example of a Type of Government Grant in the United States ......................... 26
Section 16: Findings/Analysis of Objective 4 Extended ......................................................... 27
Section 17: Further Explanation of Recommendations ......................................................... 27
Section 18: The Hood: Confusing Features Expanded ............................................................ 28
Section 19: Chapter Playbook ............................................................................................... 34
Section 1: Consent Form for Survey

Worcester Polytechnic Institute

Informed Consent to Participate in Research

Study title: Cycling Without Age: Developing Funding Strategies for Nonprofit Organizations

Researchers: Owen Ferrara, Trevor Karrett, and Luke Reid

Sponsor: CWA International

We’re inviting you to participate in a research study. Participation is completely voluntary. If you agree to participate, you can always change your mind and withdraw. There are no negative consequences, whatever you decide.

What is the purpose of this study?

We want to understand how Cycling Without Age chapters are funding themselves and any problems with funding that they may have encountered.

What will I do?

This survey will ask you questions about your CWA chapter, your chapter’s funding, and your experiences of acquiring funding for your CWA chapter. The survey will take around 10-15 minutes.

Risks

- Some questions may involve the finance of your chapter and you may skip these if the questions are too personal
- Due to the survey being online, there is the potential that data may be intercepted or exposed. However, the survey is on Google forms and Google has a great reputation when it comes to data security.
- There is a chance that survey responses could be compromised. However, data is being stored in a private server within Google’s system. For this reason, the data should remain secure and untouched by anyone who is not intended to see it.

Possible benefits: By participating in this survey, you will be helping to aid in the growth of Cycling Without Age as a whole. Furthermore, you are providing information that may help other chapters or new chapters grow.

Estimated number of participants: 100+

How long will it take? 10-15 minutes
**Costs:** None

**Compensation:** None

**Confidentiality and Data Security**

We’ll collect the following identifying information for research: name, email address, and chapter location. This information is necessary to give context to your responses and allows us to contact you in case of further questions.

**Where will data be stored?** On the Google Form servers.

**Who can see my data?**

- We (the researchers) will have access to all data submitted. This is so we can analyze the data and conduct the study.
- The Institutional Review Board (IRB) at WPI, the Office for Human Research Protections (OHRP), or other US federal agencies may review all the study data. This is to ensure we’re following laws and ethical guidelines.
- Data that is collected may be shared in official write-ups and/or presentations for our project. The data may be presented in a collective or individual matter. However, we will not disclose information such as your email or names without your approval.

**Contact information:**

**For questions about the research, complaints, or problems**

Email the research team at: partnerships@cyclingwithoutage.org or the individual members:

- Luke Reid at lcreid@wpi.edu
- Owen Ferrara at ogferrara@wpi.edu
- Trevor Karrett at tjkarrett@wpi.edu

**For questions about your rights as a research participant, complaints, or problems:**

Contact the Worcester Polytechnic Institute IRB Chair (Professor Kent Rissmiller, Phone: 1-508-831-5019, Email: kjr@wpi.edu) or the Human Protection Administrator (Gabriel Johnson, Phone: 1-508-831-4989, Email: gjohnson@wpi.edu)

**Agreement to Participate**
If you meet the eligibility criteria below and would like to participate in this study, please sign your name below. Remember, your participation is completely voluntary, and you’re free to withdraw at any time.

(I am at least 18 years old)
Section 2: Survey Send Out Email

Subject: CWA Affiliate Fundraising Study

Dear Cycling Without Age Affiliate,

Link to the survey through Google Forms: https://forms.gle/DntbQ9PLayCydhgP7

It should take no more than 5 minutes

We are a group of students from Worcester Polytechnic Institute in Worcester, Massachusetts working with CWA to improve fundraising to allow the organization to continue to grow at its impressive pace. We’re inviting you to participate in a fundraising study. Answering this short survey will help provide insight into fundraising strategies in your chapter. Our time with CWA is limited so please respond by 16/9/2019 (9/16/2019 for USA).

Please feel free to reply with any questions you may have!

Thank you,

WPI CWA Team

Section 3: Chapter Survey

Thank you for taking the time to fill out our survey regarding the fundraising of your chapter.

First, we will ask questions about your chapter.

[Question 1] Free Response: Where is your chapter located?

[Question 2] Free Response: When was your chapter founded?

Now, we will ask questions about your chapter’s funding.

[Question 3] Y/N: Has your chapter obtained funding for a Trishaw bike yet?

If yes,

[Question 4] Multiple Choice: How many Trishaws does your chapter own?

1
[Question 5] Free Response: What strategies did your chapter use to obtain funding?

[Question 6] Free Response: Could you identify a primary funder?

[Question 7] Free Response: Could you list/describe any difficulties that you have had with obtaining funding?

[Question 8] Multiple Choice: Could you estimate the start-up costs needed to pay for the Trishaw?
- < 5000 USD
- 5000-7500 USD
- 7500-10000 USD
- 10,000 -15,000 USD
- > 15,000 USD

[Question 9] Multiple Choice: How many people volunteer at your chapter?
- 1-5
- 6-10
- 11-20
- 20-30
- >30

If no,

[Question 10] Free Response: What strategies has your chapter attempted to achieve funding?

[Question 11] Free Response: Could you describe/list the difficulties that you have had with obtaining funding?

[Question 12] Multiple Choice: Could you estimate the start-up costs needed to pay for the Trishaw?
- < 5000 USD
- 5000-7500 USD
- 7500-10000 USD
- 10,000 -15,000 USD
- > 15,000 USD
All,

[Question 12] Y/N: Would you be interested in a follow-up interview about your chapter’s funding strategies and information?

If yes,

[Question 13] Free Response: Could you enter an email address that we can contact you at?

Thank you for taking the time to fill out our survey!

Section 4: Survey Implementation/Statistical Information

Survey Method: Survey participants were selected using a stratified random sampling method. The survey was based on a Google form due to the global popularity and familiarity of Google’s platforms. The survey was sent from a CWA-based email to get a higher response rate. The survey was sent out twice. Trishaw ownership was a selection factor for the first survey but not the second. However, geographic frequencies still affected selection in both surveys.

The implementation of the survey initially followed the plan for sending it to 150 chapters around the globe. There was a mix of 80 chapters that had trishaws listed in CWA’s database and 48 that do not have trishaws. Thereby, around ⅔ of the chapters had trishaws and ⅓ did not. As expected, the majority of chapters that responded have trishaws. The exact response rate is hard to determine because some respondents answered with an email that was not the same as the email that was sent the survey. For this reason, it was difficult to completely cross-reference the survey send out list. However, it is known that at least 14 chapters responded before the survey was uploaded to The Hood. Uploading the survey to The Hood was done to elicit more responses and was not a source that we initially planned on using. After adding the survey to The Hood, 2 more responses were received. Thus, the maximum amount of responses after the first survey was 16. This leaves the minimum response rate at 11%. According to the CWA team, this response rate is around the same that they expect with their surveys. In addition, the survey respondents were diverse in terms of geographical location, which is displayed on a map made with Google’s MyMaps software.
However, the group needed more than 16 responses to ensure a wider variety of results and interview possibilities. At this point, another strategy needed to be attempted. The end goal was to receive close to 40-50 chapters regardless of response rate. The new strategy design better targeted regions and was aimed to elicit more responses. Instead of sending out the survey to all regions, the new survey lists were created for specific regions. Canada, Europe, Oceania, and the United States were now organised on separate spreadsheets. The trishaw to no trishaw ratio was also not considered as critical as the first survey. For example, 28% of chapters in the new United States list have trishaws. Whereas, 55% of chapters in the Europe list have trishaws. The total amount of chapters in the lists also increased significantly. The combined new lists had 413 chapters, which was a 263 chapter increase from the 1st survey. The new send out was also sent out by using a scheduled email to send to the target areas at around 10:00 to 11:00 local time to solve the potential issue of the survey getting buried in inboxes overnight. The end result of this new send out method was 25 new responses with a 6.5% response rate, which brought the total to 41 responses. All of the locations were added to the map to display the final reach of the survey.
These responses display that the survey reached several of the main key areas where CWA chapters are located. These areas are Australia, Canada, the United States, & Western Europe. Notable exclusions include the nordic countries: Denmark, Finland, Iceland, Norway, & Sweden. The reason being is that these chapters individual emails are not within the databases that we have access too. However, we were directly in contact with the Denmark national chapter and reached out to the other national chapters for further insight on their organisations. Another lacking area of the graph is Germany and the surrounding countries, which have a large CWA footprint. These areas did have emails to contact however no responses were received. These national chapters were also contacted. The lack of certain areas was not a large concern because the survey passed the goal of 40 responses while still maintaining a diverse footprint. After waiting for more responses for a week, the survey was officially closed for submissions. In total, the survey was sent to 541 chapters resulting in a 7.6% response rate. Even though the response rate fell from the initial 11%, the 7.6% rate was still within the range deemed successful by CWA. This fall was likely due to the decrease in the number of chapters with trishaws from the first survey. Seventy-nine percent of the chapters from the first survey responses have trishaws. Fifty-six percent of chapters from the second survey responses have trishaws. In total, 42% of chapters sent the second survey had trishaws. Thus, more chapters with trishaws replied to the survey than those that didn’t. This also likely means that the lower response rate could be tied to the increase in chapters surveyed without trishaws. Even though the percentage decrease is not ideal, the survey still received a higher total of responses from chapters.
without trishaws because of the new ratio. This allowed for more analysis of trends on both sides of chapter funding, unfunded and funded.

Section 5: Interview Consent Form

Worcester Polytechnic Institute
Informed Consent to Participate in Research

Study title: Developing Funding Strategies for Nonprofit Organizations

Researchers: Owen Ferrara, Trevor Karrett, and Luke Reid

Sponsor: CWA International

We’re inviting you to participate in a research study. Before you agree, however, you must be fully informed about the purpose of the study, the procedures to be followed, and any benefits, risks or discomfort that you may experience as a result of your participation. This form presents information about the study so that you may make a fully informed decision regarding your participation. Participation is completely voluntary. If you agree to participate, you can always change your mind and withdraw. There are no negative consequences, whatever you decide.

What is the purpose of this study?
We want to understand the ways individual CWA chapters have been able to fundraise for trishaws and other expenses. With this information, we hope to help CWA, as a whole, grow.

What will I do?
This interview will contain questions about your chapter’s approach to fundraising, successes in fundraising, and your current funders. It also includes questions about your experiences with CWA International and your national chapter. The interview will be around thirty minutes to an hour long and will be conducted by a video chat over the internet. This interview’s audio will be recorded.

Risks:
- There is a low chance that someone who is not either the researchers or the CWA Hub Team that may gain access to the recording because of it being stored on a
computer. This risk will be minimized by ensuring that the recordings are limited to one device and will not be uploaded to a shared cloud such as google drive.

- In the event that a question makes you feel uncomfortable, you should feel free to not answer that question.

**Possible benefits:** The data collected from these interviews will be used to grow CWA International and its chapters. As a result the growth that CWA sees, it will also benefit the seniors that the organization supports.

**Confidentiality and Data Security**

We’ll collect the following identifying information for the research: your name and the location of your chapter. This information and the interview itself will be stored on one of the researcher’s laptops and will only be shared with the researchers and the CWA Hub Team. Records of your participation in this study will be held confidential so far as permitted by law. However, the study investigators, the sponsor or it’s designee and, under certain circumstances, the Worcester Polytechnic Institute Institutional Review Board (WPI IRB) will be able to inspect and have access to confidential data that identify you by name. Any publication or presentation of the data will not identify you without your consent.

**Contact information:**

**For questions about the research, complaints, or problems,**

Email the research team at: gr-cycling-a19@wpi.edu or the individual researchers:

- Luke Reid at lcreid@wpi.edu
- Owen Ferrara at ogferrara@wpi.edu
- Trevor Karrett at tjkarrett@wpi.edu

**For questions about your rights as a research participant, complaints, or problems:**

Contact the Worcester Polytechnic Institute IRB Chair (Professor Kent Rissmiller, Phone: 1-508-831-5019, Email: kjr@wpi.edu) or the Human Protection Administrator (Gabriel Johnson, Phone: 1-508-831-4989, Email: gjohnson@wpi.edu)

**Agreement to Participate**
If you meet the eligibility criteria below and would like to participate in this study, please sign your name below. Remember, your participation is completely voluntary, and you’re free to withdraw at any time. 
(I am at least 18 years old)

Section 6: Chapters with Trishaw Funding Interview Questions

Chapter Location: 
Contact: 
Date of Interview: 

These interviews will be conducted over a face to face video sharing software such as Zoom or Skype. We will choose whatever is most accommodating for our interviewees. Due to the semi-structured nature, some questions may be asked on the spot. However, all interviewees retain the right to not answer any question(s) of their choosing.

Guiding Questions
[Question 1] What inspired you to start your CWA Chapter?

[Question 2] How many volunteers are active/pilots?

[Question 2a] What strategies have you used to attract volunteers?

[Question 2b] Can you estimate the number of riders that you have?

[Question 2c] Can you estimate the number of rides per week? (if not: month, year, etc)/How do you keep track of this (Data collection method)?

[Question 3] How hard was it to begin the chapter?

[Question 4] How did your chapter initially approach fundraising?

[Question 5] Which fundraising methods did your chapter attempt?
[Question 5a] If corporations, ask about which ones

[Question 5b] Which funding sources were the most successful

[Question 6] How did you find these funding sources?

[Question 7] Could you expand upon your primary funder?
   [Question 7a] Who are they?
   [Question 7b] How were they approached?
   [Question 7c] How were they convinced?
   [Question 7d] Were there in-person meetings?
   [Question 7e] How long did it take to get the funding/What were the results (funding received) *may also make sense to ask this about other sources?

[Question 8] Could you estimate the total costs of all Trishaws/operating costs (in USD or local we can convert)
   [Question 8a] How expensive is upkeep and how is that funded?
   [Question 8b] Estimated costs for insurance/where the insurance comes from/how it is paid for (if not already answered)

[Question 9] Did you receive any assistance from CWA in starting your chapter (either direct or through web services such as the Hood or Podio)?

[Question 10] Did you run into any roadblocks or obstacles when pursuing funding?
   [Question 10a] Describe these roadblocks?
   [Question 10b] What are some roadblocks that do not revolve around funding?
   [Question 10c] How have those been solved or what has been tried to solve these issues?
[Question 11] Did you contact other CWA chapters to help you start or to provide advice after you started?

[Question 12] What is the state of cycling infrastructure in your area/Any concerns?

[Question 13] Any further comments about funding or your CWA experiences?

Section 7: Chapters without Trishaw Funding Interview Questions

Chapter Location:
Contact:
Date of Interview:

Note: No trishaw

These interviews will be conducted over a face to face video sharing software such as Zoom or Skype. We will choose whatever is most accommodating for our interviewees. Due to the semi-structured nature, some questions may be asked on the spot. However, all interviewees retain the right to not answer any question(s) of their choosing.

Guiding Questions

[Question 1] What inspired you to start your CWA Chapter?

[Question 2] How many volunteers are currently interested in the program?

   [Question 2a] Have you had difficulties attracting volunteers?

   [Question 2b] What strategies have you used to attract volunteers?

   [Question 2c] Do you have any potential riders interested in the program?

[Question 3] What are the main difficulties that your chapter has faced during its startup?

[Question 4] How has your chapter initially approach fundraising?

[Question 5] Which fundraising methods has your chapter attempted?

   [Question 5a] If corporations, ask about which ones
[Question 6] What funding sources have provided results thus far?

[Question 7] How did you find these funding sources?

[Question 8] Could you expand upon your current funding sources
   [Question 8a] Who are they?
   [Question 8b] How were they approached?
   [Question 8c] How were they convinced?
   [Question 8d] Were there in-person meetings?
   [Question 8e] How long did it take to get the funding/What were the results (funding received) *may also make sense to ask this about other sources?

[Question 9] Could you estimate the total costs to start up your chapter?
   [Question 9a] Estimated ongoing costs (insurance, upkeep, parking, etc)?

[Question 10] What roadblocks have you run into while funding?
   [Question 10a] Describe these roadblocks?
   [Question 10b] What are some roadblocks that do not revolve around funding
   [Question 10c] How have those been solved or what has been tried to solve these issues?

[Question 11] Has CWA helped you with the upstart process (either directly or through online services such as the Hood or Podio)?

[Question 12] Has your chapter contacted other chapters for help in the start up process?

[Question 13] What is the state of the current cycling infrastructure/ Concerns about lack of cycling infrastructure?

[Question 14] Any further comments about funding or your CWA experiences
Section 8: National Chapters Interview Questions

[Question 1] How centralized/set up is the national chapter?

[Question 1a] Is there a team dedicated to the national chapter or is it only volunteers from local chapters?

[Question 1b] Is there a designated location/office for the national chapter?

[Question 1c] Why did you take the role of being the national contact/Being in the national chapter

[Question 1d] Time commitment to perform the national chapter’s work?

[Question 2] How many people work for the national chapter both paid and volunteer?

[Question 3] When was the national chapter established?

[Question 4] How many affiliates within the country are members of the national chapter/How many trishaws are there in total?

[Question 5] How much do affiliates pay to be a part of the national chapter, if at all?

[Question 6] What support does the national chapter provide to its member affiliates?

[Question 7] What are the primary sources of funding for the national chapter?

[Question 8] What strategies did you use/are using to achieve funding?

[Question 9] How does the national chapter spend its funding (what costs the national chapter the most/least)?

[Question 10] What are the challenges and limitations that the national chapter encounters?

[Question 11] What resources/funding would be necessary to overcome those limitations?
[Question 12] How would you rate the communication between the national and the local chapters from 1-10? Could you explain this rating? How do the chapters currently communicate and how could that be improved? How does the national chapter contact CWA international?

Section 9: PricewaterhouseCoopers (PwC) Interview Questions

1. Ask about their role/duties at PwC as “Senior Manager Global Corporate Responsibility”
2. How is mission fit is usually determined?
   a. How does PwC decide on which CSR ventures to partake in?
   b. What ventures does PwC currently focus in and why?
   c. What are the main elements of CSR at PwC
3. How important is CSR from a marketing level?
4. How important is CSR from an inter-company level?
5. Is there feasible data on the impact of CSR? (Does PwC track the effects of CSR or what was donated?)
6. Does PwC currently sponsor any nonprofits?
7. How does PwC decide on which nonprofits to partner with or sponsor?
8. How were those sponsorships established?
9. What are the main steps that go into establishing a partnership?
10. How do personal connections to nonprofits affect partnerships formed?
11. How do partnerships benefit PwC
12. How do partnerships benefit the nonprofits
13. When should companies worry about CSR?

PwC Answers (Summary)


CSR Scale: For PwC, CSR has become less of a focus and more of an integral part of PwC. This means that each office or branch has its own CSR team. This local teams know their regions best and are therefore better changemakers. Tracey’s job is to create their global
strategy which is more concerned with CSR within the company such as environmental footprint. She also checks in with individual teams to see their progress.

**Partnerships:** These are made on the national or regional level and typically reflect the challenges that a particular country is facing. One example would be in Australia where homelessness has become an epidemic and the Australian CSR team is working with organisations that seek to decrease it. Even though partnerships are made on a more regional level, information about them is shared between other CSR teams that wish to address similar issues. As such, an organisation that partners with PwC at one office may partner with another office as well. There is not an international flagship nonprofit partner.

**Changing CSR:** Larger global companies, like PwC, are shifting away from solely giving monetary support and are moving towards an approach that includes more employee volunteerism and pro-bono work, or skilled volunteerism.

**Why CSR:** PwC benefits both internally and externally. Externally the company is able to build credibility and trust. Internally the employees are able to get involved in something that is bigger than themselves and are able to feel good about giving back.

**Starting and Sustaining Partnerships:** Mission is key when PwC decides to partner with an organisation. PwC also is diligent is looking at if such organisations are trustworthy, profit-loss statements play a big part in this, as well as if a partnership would be mutually beneficial. To sustain a partnership, communication is key. Communicating about expectations and goals is an important part in ensuring that both sides are benefiting from the partnership.

**Section 10: American Heart Association (AHA) Interview Questions**

1. Ask about their role as Senior Director at Central Mass AHA. What are their responsibilities? What projects do they oversee?

2. How does the AHA get their funding? Both on their level and on the national level (if they know this)

3. What are the main sources for their funding? Government, local donors, corporations, program fees?

4. What strategies does AHA use to get that funding?
5. Is it easy for AHA to obtain this funding?

6. Does AHA form partnerships with other nonprofits?

7. Does AHA form partnerships with corporations?

8. What are the steps that are involved in forming these partnerships? (how are they approached, convinced, etc?)

9. How do AHA locations communicate? What is communicated? Is this communication effective?

10. Advice for smaller nonprofit operations?

11. How should nonprofits operate effectively?

12. Ask about AHA operation structure. How do they make sure that information flows if not already covered?

AHA Interview

**Role:** Covers Central Mass to raise money for AHA by running events to engage both individuals and corporations

**Funding:** Events: For example Heart Ball (Gala at Mechanics Hall) → corporate sponsors donate $5,000-$50,000 and take a table/ recognition at the event and associated with the good name with AHA. Individuals also donate through auctions and donations throughout the night. Additionally, they run mail campaigns and also collect other corporate donations.

**Finding Partners:** An executive leadership team is built every year that made up of executives from a variety of companies. This groups volunteers there social networks or connections. This allows Blair to bring someone who has a personal connection to a meeting with a potential donor. This team changes as current members can recommend other colleagues.

**Partnerships with NPOs:** These are rare as NPOs don’t want to share their donor lists, however national events could see a partnership with another big NPO like the Red Cross.

**Sustaining Partnerships:** He sustains partnerships by understanding the expectations of each partner. Some partners are happy with donating and meeting once a year, while
others want more collaboration and therefore monthly meetings. These contacts are all managed through an AHA database that is shared throughout the national organisation. Additionally, Blair tries to form a connection to at least 2 members of each partner company so that the partnership doesn’t dissolve should a contract leave that company.

Section 11: Project Shared Google Drive Guide

WPI CWA Funding Project Shared Folder Guide (Transferred Ownership to CWA)

Overview

Hej!

Welcome to the shared folder for the third Worcester Polytechnic Institute (WPI) CWA project team. We spent 7 weeks working with CWA in Copenhagen. Our project focused on researching and finding funding for the movement on a local and international level. This involved a mixture of researching and categorizing companies CSRs, chapter surveys, chapter interviews, and more. The purpose of this document is to be a guide to utilise our shared drive.

If you have any questions, feel free to email the team at

gr-cycling-a19@wpi.edu

or the individual researchers:

Luke Reid: lcreid@wpi.edu
Folders

Note: The most important sections should be saved to a desktop computer and/or flash drive. We recommend the interview, potential funder, and survey sections. However, all can be downloaded and it is up to CWA.

CWA Resources
Includes resources provided by CWA’s staff or from other CWA resources such as the CWA website, The Hood, or Podio. For example, CWA’s profit and loss sheets from 2018 and 2019 and information on the NextGen Changemakers program.

Final Project Materials
This folder includes the final report in document form and the final report in booklet form. This is also where the final presentation and funding playbook can be found.

Interview Section
Folder for all interview questions, responses, and analysis organised in 6 subfolders

Corporate and Nonprofit Interviews
Contains questions and responses from our interviews with PricewaterhouseCoopers and the American Heart Association.

Interview Analyses
Contains interview trend analysis and the main takeaways from all the interviews in Google sheets form.

Items Received from Interviews
Contains any resources provided by interviewees. This includes data, funding source information, and more.
**Local Chapter Interviews**
Contains answers from interviews with local chapters. There are individual Google docs for each local chapter and a synthesis document that has concise answers from all local chapter interviews.

**Local Interview Templates**
Questions asked to local chapters.

**National Chapter Interviews**
Questions and Answers from national chapter interviews.

**Meeting Items**
Contains notes from a few meetings with CWA staff and two subfolders: Advisor Meetings and Sponsor Meetings.

The Advisor Meetings subfolder contains meeting agendas, progress reports, and minutes from our weekly meetings with our projects advisors.

The Sponsor Meetings subfolder contains meeting agendas, progress reports, and minutes from our weekly meetings with our projects advisors and CWA.

**Miscellaneous**
A collection of documents, notes, ideas, and resources that did not fit within the other folders.

**Non-Final Project Materials**
Contains the drafts, outlines, and other resources for the project’s final report and presentations.

**Potential Funder Section**
Contains all the potential funders identified and the analyses of those funders. The group used CSR information to determine if a funder has the potential to be a partner for CWA. Further analysis of the funders with the most potential can be found in the Typology sheets.
file. The section also includes information on nonprofits that were contacted for funding advice.

**Presentations**
Contains our Google slides presentations from our weekly meetings with our advisors and with other students from our university. There are 5 in total.

**Project Prep Semester**
Before arriving in Denmark, the group did preliminary work at our university (WPI) back in Worcester, United States. This included researching background information and planning methods for the project. The process resulted in the final proposal for the project. The folder contains subfolders for each week of the process. The final proposal is available in the project prep folder directly for ease of access.

**Survey Section**
Contains the survey Google form, the planning for the survey, and survey analyses.
Section 12: Further Explanation on NPO Funding Models from the Stanford Review Study

These models give NPOs a clearer focus towards a funding strategy that would work best for their situation. The Heartfelt Connector and Member Motivator models revolve around individual giving. The Heartfelt Connector model involves an NPO with a mission that appeals to a large population. These are primarily in the areas of environmental, international, and medical research. The Member Motivator model uses its mission to attract donors by weaving the mission into areas with which donors would want to be involved. Typically, these involve religion, environment, and the arts (Christiansen, Foster, & Kim, 2009). The Public Provider and Beneficiary Broker models have government funding foci. The Public Provider model works because the government allows that NPO to provide or supplement some service that a government agency provides or is interested in advancing. These NPOs need to have the most innovative and efficient ways to provide these services because many NPOs might compete for funding from one agency. The Beneficiary Broker model revolves around several NPOs competing to provide a government's services (Christiansen, Foster, & Kim, 2009). These allow the receivers (beneficiaries) to decide which NPO to choose.

Section 13: More Information on Foundation Funding

These differences are more prevalent in some countries than in others (Toepler, 2018).

As of 2015, the US currently has 86,203 foundations, with only 3,451 of them being operating foundations (Foundation Center, 2019). The causes that US foundations support vary greatly, however many large foundations, such as the Bill and Melinda Gates Foundation, support several social movements (Hammack & Smith, 2018). The total giving across foundations is heavily imbalanced; only 0.05% of foundations make up just under one-third of all dollars donated annually (Foundation Center, 2019).

Foundations in Europe can compare to those in the US however they do have several differences. Unlike US foundations, European foundations are not required to make public reports about their finances and only need to report this information to their national governments (Toepler, 2018). This lack of transparency has resulted in a lack of data on Europe’s foundations as a whole (von Schnurbein & Perez, 2018). European foundations are
also more likely to be operating foundations. For example, operating foundations make up half of all Italian foundations (Toepler, 2018).

Section 14: Difficulties in Forming Partnerships

There is some difficulty in the formation of these alliances. A common issue is miscommunication between the two parties due to the lack of knowledge of each other’s objectives. Often, each side sets unrealistic goals for the other. This commonly leads to breakdowns between the two parties. For this reason, it is crucial that each side clearly articulate goals and objectives at the beginning of a partnership to avoid the potential issues that could arise (Berger, Cunningham, & Drumwright, 2004).

Section 15: Example of a Type of Government Grant in the United States

In the US, one type of grant that’s already been successfully funded by the government on the state level is funding derived from what is called a Civil Money Penalty, consisting of fines imposed upon care home facilities. These grants are used to aid the lives of the elderly living in retirement homes and centres. The grants are given to organisations that are partnered with elderly care facilities to improve their residents’ lives (CMS, n.d.). First, the grants requests are made on a local level, which is then passed on to the state level if approved. The state then decides whether to grant the organisation the funding requested. This means that the grant acts as a one-time funding source that doesn’t repeat, similar to a large one-time donation.
**Section 16: Findings/Analysis of Objective 4 Extended**

The mix of the three objectives is the basis for the deliverables provided to CWA. All survey and interview responses, as well as data analysis, are present in a shared google drive. The funder list analysis, as well as typology and analysis, are shared with CWA as well. Responses to corporate and non-profits interviews are also on the drive. In addition to the analysis, data, and funder list, a playbook for local chapters and CWA International was developed to provide recommendations to allow for better funding. This is also on the google drive. Any deliverable listed above will be in the supplement. Instead of putting all files in the shared drive in the supplement, the supplement will have a guide detailing the shared drive and where to find certain materials.

**Section 17: Further Explanation of Recommendations**

*Recommendation 4 (Expanded) - Improve chapter collaboration and discussions*

Chapters should be encouraged to collaborate with each other. The Hood is one avenue for this collaboration but is presently underutilised. Adding chapters to groups on The Hood based on their location would be beneficial for team building. Chapters can be encouraged to post on The Hood in their local group to introduce themselves. This encouragement would build camaraderie and foster a feeling of community. This would cut down on unnecessary questions in the global Hood sections. More encouragement to share trishaws would also aid in building the community while helping newer chapters gain traction. A feature on The Hood that promotes demo trishaw sharing should be implemented. Additionally, CWA should add a feature that shows nearby chapters, their contact information, and any other notable facts about that chapter. This could help provide the push to branch out to their local connections. Many chapters, especially those run by a single individual, could benefit from this connectivity and collaborate by building support groups.

*Recommendation 5 - Improve organisation on The Hood*

To further improve chapter discussion and sharing of information, The Hood should be better organised to minimise confusion. This includes better resources for onboarding chapters onto The Hood. To do this, the information must be easy to find and concise. For example, the FAQ section is currently too long. Furthermore, discussion categories can be better organised. Instead of having similar subcategories under the main categories,
important subcategories can be brought to the forefront. For example, fundraising could be the main category instead of having two fundraising subcategories in both the knowledge base and questions categories.

**Recommendation 6: Encourage data collection from chapters**

Current data collection practices in the movement are staggered, which is likely how it will remain until the organisation receives a significant sum of money to spend on distributing software worldwide. However, current data collection within the movement is sparse. There are examples of chapters, especially within the Nordic region, using the software gobooking.bike. This software could potentially be offered directly to others within the movement. There are good examples of data collection outside of the gobooking system. For example, the Barcelona chapter’s method of having nursing home volunteers fill out a data sheet provides valuable data that is beneficial when obtaining funds. Data collection can be extremely important when chapters want to convince funders that wish to see the quantitative effects of CWA.

**Recommendation 7: Find a way to sustain national chapters due to their importance**

National chapters are extremely important because they perform critical tasks that help support and sustain their local chapters. Without them, local chapters would not be as successful or have somewhere to go for advice. However, many national chapters are working on a volunteer basis and do not have concrete plans for succession. If one of these critical volunteers could not continue their work, the movement may stagnate. This is why CWA must assess and find ways to sustain national chapters. National chapters are the key link between CWA International and local chapters and cannot be lost.

**Section 18: The Hood: Confusing Features Expanded**

The main takeaway is that there is good content but that content is unorganised and not user-friendly. This is a problem when trying to find resources to supplement fundraising or any other specific effort for local chapters or the international. This problem starts on the first page of The Hood where the left side has categories for discussion and the right side contains the latest posts. The latest posts aren’t necessarily helpful to the user depending on whether their need appears directly on the screen. This can’t be promised as topics in
this section vary widely, ranging from specific questions about trishaw specifications to a new chapter posting about their startup. The categories on the right side of the front page are the most helpful tabs but are tough to navigate. The primary categories are Questions and Discussion and the Knowledge Base. These categories are designed for different usage. Their implementation and sub-categories are confusing for the user. The sub-categories are confusing because there is a significant overlap between the sub-category names. For example, the knowledge base has a sub-category named “Finance & Fundraising” and general discussion has a sub-category named “Fundraising.” Examples of other similarly named sub-categories can be seen in Table 10.

<table>
<thead>
<tr>
<th>Questions &amp; Discussions Category Sub-Category Name</th>
<th>Knowledge Base Category Sub-Category Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fundraising</td>
<td>Finance &amp; Fundraising</td>
</tr>
<tr>
<td>Functionality of The Hood</td>
<td>Guides and Tutorials for The Hood</td>
</tr>
<tr>
<td>Marketing and Merchandise</td>
<td>Marketing</td>
</tr>
<tr>
<td>Starting a Chapter</td>
<td>Getting Started</td>
</tr>
</tbody>
</table>

Table 10: Examples of similar sub-category names from the Questions & Discussions and Knowledge Base categories on The Hood

While the main categories are intended for different resources, it is possible that the same knowledge could be gained from both. The ability to post in both categories leads to two different sub-categories that could have helpful and supplementary information for the
movement. This provided problems when parsing through The Hood for valuable resources, which likely means that chapters are facing similar issues.

For fundraising, the questions and discussion category has 3 posts and the knowledge base category has 6 posts. These are displayed in Figures 18 and 19 respectively.

![Figure 18: Posts in the fundraising sub-category within the Questions & Discussions category](image1)

![Figure 19: Posts in the finance and fundraising sub-category within the Knowledge Base category](image2)

Looking at the posts themselves provides insight into other organizational and engagement problems. The first concern is the limited number of posts. There are only 9 posts across both fundraising sub-categories. Nine posts is extremely low engagement for a topic as critical as fundraising. The next concern is chapters posting in the wrong area. This is seen in Figure 12 with the posts titled “Business Plan” and “Donate a Trishaw”. Both posts contain questions about the topic rather than knowledge on the topic. This highlights the confusing nature of the sub-categories and the difficulties of searching through the Hood. If someone wants information on a business plan, they won’t find it in that post. Another concern is with engagement. The two most recent posts in Figure 11 has only 18 views for each. The posts in Figure 12 have more views, but only one post has more than 1 reply. Further evidence of a lack of engagement can be seen by looking at the posts themselves. The first post in Figure 12 titled Fundraising has 149 views. Ideally, this would be a post
that chapters and potential fundraisers could use to help them in their fundraising process. The post does have useful suggestions such as corporate sponsorship, crowdsourcing, care centres, and the government. What the post lacks is brevity. It starts with a large graphic that takes up half of the post but only lists the funding sources. Next, there are clickable tabs that display explanations displayed in Figure 20.

Some of these tabs have valuable information such as the examples of Zendesk and Salesforce as CWA corporate sponsors. Other tabs are lacklustre with the social clubs and philanthropist tabs listing TBD under their description. Furthermore, the care centre government tabs only state that they are a possibility without going into much detail. The post also includes regional fundraising information for Canada, Finland, and the United States. This is too much information to include in one post and the lack of engagement can be displayed by the number of times that the embedded links were clicked compared to the total post views, which is displayed in Table 11.

<table>
<thead>
<tr>
<th>Link Name</th>
<th>Clicks</th>
<th>Percentage of Post Views (Total: 149 Views)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dementia Community Investment (Under Canada Tab)</td>
<td>4</td>
<td>3%</td>
</tr>
<tr>
<td>Email Template to Corporate</td>
<td>6</td>
<td>4%</td>
</tr>
<tr>
<td>----------------------------</td>
<td>---</td>
<td>----</td>
</tr>
<tr>
<td>General Fundraising Doc</td>
<td>9</td>
<td>6%</td>
</tr>
<tr>
<td>New Horizons Seniors Program (Under Canada Tab)</td>
<td>2</td>
<td>1.3%</td>
</tr>
<tr>
<td>Salesforce Link</td>
<td>1</td>
<td>0.7%</td>
</tr>
<tr>
<td>Zendesk Link</td>
<td>3</td>
<td>2%</td>
</tr>
</tbody>
</table>

Table 11: Lack of engagement displayed by link interaction

This is particularly unfortunate because of the difficulties that chapters have with fundraising. However, not all posts are unproductive. The first post in Figure 11 gained a lot of attention with 108 views and 8 replies. The chapter asked for information on measurable impact of the CWA program. Several chapters replied with examples of quotes from riders and with data that has been collected on CWA’s impact. This shows that The Hood can be a valuable resource for chapters when engagement is high. However, the full potential is clearly not being realised.

The lack of engagement on an issue as critical as fundraising can be connected to a general lack of involvement on the entire site. Total engagement was assessed by looking at total visits to The Hood in the last year. Of the 398 users on The Hood, only 23% of users have visited the site 10 times in the last year. Only 2.5% of users have been on the site for more than 50 times in the past year. Engagement could also be assessed by looking at posting and post interaction. Thirteen percent of chapters have posted in the last year and 19% have replied to a post in the last year. This gives evidence to support the idea that the majority of chapters on The Hood, which does not have the majority of worldwide chapters
on it, are not engaging with the site. This could be blamed on the current confusing state of The Hood. However, another finding within The Hood provided a different example of the lack of engagement. This finding is the groups section which is hard to find because the user has to know to click the unlabeled menu button in the top right. The activity and utilisation of the groups themselves is also poor. Many of the groups have few members and activity within the groups is either not there or taken up by posts in different sections of The Hood. Table 12 contains examples of the groups and their current involvement.

<table>
<thead>
<tr>
<th>Group Name</th>
<th>Number of Current Users</th>
<th>Estimated potential Number of Users</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia</td>
<td>4</td>
<td>&gt; 30</td>
</tr>
<tr>
<td>Canada</td>
<td>4</td>
<td>&gt; 30</td>
</tr>
<tr>
<td>France</td>
<td>5</td>
<td>&gt; 20</td>
</tr>
<tr>
<td>United States</td>
<td>7</td>
<td>&gt; 100</td>
</tr>
<tr>
<td>Wisconsin</td>
<td>1</td>
<td>&gt; 30</td>
</tr>
</tbody>
</table>

Table 12: Low utilisation of groups within The Hood

The lack of group usage is disappointing because this could be a worthwhile resource to keep Hood engagement up and provide country-specific fundraising information that is otherwise lost and not discussed.
Section 19: Chapter Playbook

Note: The CWA International Playbook was not included due to the sensitivity of potential funder information.

Note 2: While the Playbook focuses on funding, there is other pertinent information to starting a chapter. For this reason, and for the design, the name was changed to “Chapter Playbook”
Welcome to Cycling Without Age!
Chapter Playbook

Owen Ferrara, Trevor Karrett, and Luke Reid
This project (conducted by students from the United States) was centered around helping Cycling Without Age develop funding strategies on the local and international levels. The purpose of this playbook is to provide chapters with ideas and guidelines when fundraising/starting a chapter, according to the research that we've done. For a more complete overview, feel free to read our entire project booklet. Visit https://thehood.cyclingwithoutage.org/

The Project Team: Owen Ferrara (the pilot), Trevor Karrett (left rider), and Luke Reid (right rider)
Welcome to CWA!

The Hood
All new affiliates are recommended to join and introduce themselves on The Hood and become familiar with the platform.

The Hood: https://thehood.cyclingwithoutage.org/

The Hood is a valuable resource for interchapter communication that has many uses. Furthermore, new chapters can communicate with more established chapters that can help answer questions or provide suggestions.

If you have not been invited, or require assistance, email thehood@cyclingwithoutage.org.
There are many elements to consider when starting a CWA chapter. However, many established chapters are willing to help, so don't hesitate to reach out!

Here's a list of important considerations when starting a chapter (don't worry!- we'll address how other chapters solved the very same problems you might run into!)

Considerations

- Effort! Starting a chapter can be difficult but very rewarding
- Funding your first trishaw
- Insurance
- Finding volunteers
- Storing the trishaw
- Trishaw maintenance
Recurring Costs

Insurance
Insurance is often provided by care centres, provided by some national chapters, or can be self funded. A helpful link for insurance can be found here [https://thehood.cyclingwithoutage.org/t/insurance-matters/270](https://thehood.cyclingwithoutage.org/t/insurance-matters/270).

Maintenance
Usually maintenance isn't too expensive, but contacting bike shops can help to alleviate this as well, if your chapter is run as a nonprofit then they can classify their work as an in-kind donation.

Budget Example
For further costs, an example budget can be found here [https://thehood.cyclingwithoutage.org/t/budgets/384](https://thehood.cyclingwithoutage.org/t/budgets/384).
Trishaw Cost and Funding

The trishaw is one of the most important tools and costs to consider as a new chapter and will likely be the most expensive cost in this process.

This playbook contains ideas that may help your chapter obtain a trishaw and funding.

When purchasing a trishaw, it is recommended to go through Copenhagen Cycles, who send 100% of trishaw sale profits back to CWA.

There are currently 3 models of trishaws available on the site, which can be accessed here: https://copenhagencycles.com/
Create a Business/Startup Plan

A business plan does not have to be a complex document. Instead, approach it as a chapter startup plan. This will help increase your focus and bring the project one step closer to success! In fact, potential funders are more likely to give if you have physically planned out your chapter.

The business plan should include a description of your chapter (who is involved, goals, size, etc), a description of the programs services and benefits, a funding plan, a financial plan, an organisational plan, and a marketing plan. Note: Add any information you deem necessary. Your plan is up to you!

If you need inspiration, a plan was put together by a Lisbon chapter and was translated into English and can be found here: https://thehood.cyclingwithoutage.org/t/chapter-startup-business-plan-from-lisbon/1080
Importance of Contacting Chapters

Contacting nearby chapters is an extraordinary resource available to you. Other local chapters can be found through The Hood or the map on the CWA international website. These chapters can provide recommendations on how they built their chapter and give advice on how they overcame challenges.

Don't be nervous to reach out to nearby chapters, they were in your position once too! All CWA affiliates are a part of the same organisation and want to help each other. Forming a close relationship with nearby chapters will make it easier to grow and succeed together.
Demonstration Trishaw

Chapters who were given a “demo” or “loaner” trishaw before owning their own trishaw saw many benefits.

Having a demo trishaw significantly helps new chapters in convincing funders, gaining support from care centre administration, and convincing volunteers.

Local chapters should be happy to help provide a loaner trishaw (if they have one). We recommend you organise transport and logistics. Transporting the trishaw long distances is most easily done with a trailer or (long-bed) pickup truck. Renting a trailer locally is generally inexpensive.

Being generous is part of CWA’s principles: https://cyclingwithoutage.org/affiliate/ (See section 2.1)
Trishaws as Tools for Funding

Having a trishaw is one of the most important tools available to help get funding, here are some ideas to maximise its potential:

- Show care centres staff, residents, and residents’ families.
- Bring the trishaw to any events that may be occurring and look for fundraising opportunities.
- Demonstrate the trishaw to local media for coverage, this can help gain local business support.
- Attract local politicians attention and support (this is good PR for both you and them).
Use Your Connections

Fundraising is a difficult process. Using your social connections (business owners, community leaders, family, friends, and more) can help make the process easier. Your chapter should compile lists of these connections and reach out for support and/or donations.

Regardless of the result from contacting these connections, ask for more possible contacts. This will help expand your network of connections. For example, your friend may not be able to donate but he may know a business owner who may be interested. Utilising these connections is critical to fundraising success.

Finding donors through a care centre is also an approach that can be taken. If the care home is convinced the program is viable, reaching out to resident’s family members for support is a great option (be sure to get approval for this!)

It’s always important to record information about your funding connections so you can reference them later on. Recording who you spoke with, all methods of communication you have access to, and any other relevant information will make the fundraising process better organised.
Partner with Like-Minded Organisations

Companies (or organisations) often partner with other organisations with similar interests. It is recommended to reach out to companies for funding (or organisations) that have similar missions to CWA. For example, these can be disabled, elderly, or social isolation based missions (Don't forget about companies with connections to bikes as well). Feel free to reach out to local businesses or larger companies in your area (larger companies typically let their local branches decide their own charitable giving).

For example, a chapter in Spain was able to partner with a local branch of Ingeteam, an international electrical engineering firm. The company has a campaign that incentivizes its employees to cycle to work. This partnership was found because a volunteer worked for the company. Here is a link to an article discussing the partnership https://tinyurl.com/Ingenteam-CWA.
Resources for Convincing Funders

With or without a demo bike, here are a few resources to convince and inspire those to help your CWA program.

Ole’s TEDx Talk (15 min) - https://www.youtube.com/watch?v=O6Ti4qUa-OU

“Ole” A short film (3 min) - https://vimeo.com/326058270

More useful media can be found on the CWA website: https://cyclingwithoutage.org/

CWA photos could be utilised and found at: https://www.flickr.com/people/cyklingudenalder/

Studies of CWA’s impact could also convince funders and can be found here: https://thehood.cyclingwithoutage.org/c/kb/research
Care Centres

Approaching a nonprofit care centre is a good way to gain nonprofit organisation benefits (the exact classification differs by location, and difficulty of receiving nonprofit status varies widely by country).

If you’ve partnered with a nonprofit care centre, it can significantly increase the number of grants you may be eligible for and make fundraising easier.

Many care centres don’t have the funding to purchase a trishaw, but that doesn’t mean they shouldn’t be contacted - they can provide numerous other benefits, including insurance, storage of the trishaw(s), a funding network, a volunteer network, and a steady stream of passengers.
Loan Possibilities

Loans are common for high cost items such as cars, kitchen appliances, homes, and much more. Due to the high costs of trishaws, this could be possibility for chapters to consider.

However, it is important to consider the possibility to pay loans off. If your chapter is uncomfortable with taking out a loan, then you probably should not assess this as an option.

If you chapter is considering a loan, it is important to reach out to your local bank and discuss your options and interest rates. The bank will prefer to see a detailed plan as to how they will be paid back.

This is a possibility for chapters with fundraising success but not the full trishaw cost covered. This way, current funds can be used to pay off the loan while the trishaw can be used to run and fund the program during the payoff period.

An example of a successful loan system are the Malmö chapters in Sweden, which were given the trishaws as a loan from the city’s municipality, after which they paid for trishaws over time.
Data Collection Ideas

Collecting data can help gain support for your chapter both socially and financially. Here are some examples of types of data you could collect once your chapter is up and running.

- Name, age, gender of passengers
- Repeat passengers, number of different passengers
- Total rides count, ride duration, ride distance
- Conversations during the ride (could be shared with a care centre/families of passengers)
- Changes in passengers’ mood/disposition

To benefit other chapters, please consider sharing any chapter data on The Hood.
Volunteers

It is important to stress the impact that the program provides for the riders and local community. Below are a few ideas for finding volunteers.

- **Social Media**: Be sure to advertise the program through your social media accounts
- **Local News**: Due to CWA’s exciting mission, local news may be compelled to promote the program
- **Local Events**: Attending local events with flyers or even a trishaw is great way to recruit volunteers and can show the local community the benefits of CWA
- **Cycling Clubs**: Cycling clubs or groups may be inspired by the cycling connection, less daunted by piloting the trishaw, and have practical technical knowledge
Build Relationships and Be Creative!

Good luck in your new CWA endeavour!

Be creative and feel free to try new ideas and form new bonds!

Remember to have fun, build relationships, and feel the wind in your hair!