Cycling Without Age: Developing Funding Strategies for Non-Profit Organisations

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CYCLING
WITHOUT
AGE

Abstract

Funding is one of the most common challenges that nonprofits face. This is especially true for Cycling Without Age (CWA). CWA provides free bike rides to reconnect the elderly with cycling, the outdoors, and their youth. Their mission is accomplished by using trishaws, which are 3 wheeled bikes designed to carry passengers. CWA operates on a grassroots basis through chapters spread across the world. Each chapter must fundraise for their own trishaws, which can cost upwards of USD 6,500. Finding ways to fund the movement is a growing challenge. To help solve this problem, two main foci were pursued: funding on the local level and funding on the international level. On the local level, chapters were surveyed and interviewed. This revealed the successes and difficulties that chapters encounter when fundraising. On the international level, lists of potential partners for CWA were assembled, analysed, and ranked to provide CWA with a plan for future funding.

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Funding is Essential to Create Social Change

Senior citizens around the world are affected by loneliness, depression, anxiety, and loss of connection with the world around them.[1] Cycling Without Age (CWA) is a nonprofit organisation (NPO) that provides free and leisurely bike rides for the elderly all over the world. These rides are rewarding for both the pilot and rider(s) and are conducted via a three-wheeled, three-seater bicycle called a trishaw (Figure 1).

chapters. The thin organisational structure allows for rapid growth and, within 7 years, CWA has grown to over 1,600 chapters. The rapid growth, however, has led to a significant number of chapters without the proper support to secure funding for their trishaws, which can cost upwards of USD 6,500.[3] The map in Figure 2 shows the chapters without trishaws in grey, as they've been unable to secure the required funding.

CWA is one of many NPOs that seek to create favorable social outcomes for people across the world. NPOs are not driven by

There are many funding sources that both CWA and other NPOs can target. In 2017, USD 410 bn was donated from various sources to NPOs in the United States alone.[6] Typically, funding can come from corporations, foundations, various governmental agencies or programs, individuals, and program fees.

The issue of NPO funding is not solely encountered by CWA. The National Council of Nonprofits (NCN), an informational resource and advocacy group, highlights limited resources and increased demand as common and pressing issues for NPOs.[7] A Stanford
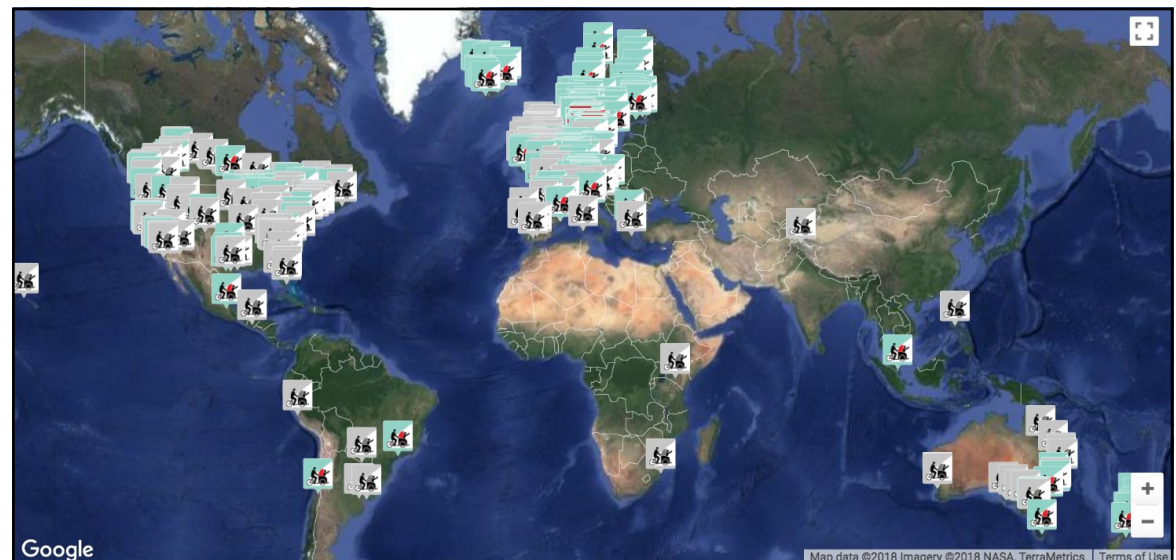

Figure 1. CWA's founder, Ole Kassow, piloting a trishaw[2]

Figure 2: All CWA chapters across the globe[4]

As an organisation, CWA operates through hundreds of different chapters distributed across the globe. CWA foregoes typical organisational structure in favor of a singular hub and relatively autonomous chapters. The hub, located in Copenhagen, sets standards for, and oversees the sale of trishaws from a website owned by the NPO and also provides information and support to

profits and are influenced less by the market; this allows NPOs to better help those affected by social injustice. Through their local branches, direct service NPOs can engage with and inform the local community on the issues with which the NPO is engaged. Many local volunteers will typically work with an NPO to create the change they want to see in their community.[5] Due to their nonprofit nature, this social change is funded primarily by donations.

Innovation Review study of over 100 successful and high income NPOs may hold some of the keys to solving this funding issue.[8] The study suggested that there are often natural matches between the funding sources and the NPOs themselves.[8]

Our goal was to help CWA find funding sources and develop funding strategies so that CWA can partner with multiple funding sources on the local and international level. The study began with accumulating a list of sources from

which CWA might gain funding. From there, the list was narrowed down to the sources with which CWA is most likely to align. For these sources, a typology was created that involved factors that typically lead to successful funding partnerships, which included: mission fit, culture fit, resource fit, and product and cause fit.[9] Additionally, local and national CWA chapters were surveyed and interviewed for insight into the funding successes and challenges that chapters faced. This provided an in-depth look into the current funding situation of CWA. Finally, the cumulation of the previous objectives resulted in a strategic plan for CWA to achieve funding.

Successful Nonprofit (NPO) Operation and Growth

As of 2015, there are over 1.5 million nonprofit organisations (NPOs) registered in the United States alone.[10] The main goal of NPOs is to effectively operate, sustain, and advance their mission. Many attributes allow NPOs to achieve success. These attributes include, but are not limited to, a captive mission, selfless volunteers, and stable funding of operations. While the exact pathway to success can differ from one NPO to the next, defining and enhancing these attributes is a key step for every NPO.

The BDO Institute of Nonprofit Excellence surveyed 100 NPOs of various sizes within the United States to collect data on the opinions of NPOs on a variety of issues. Their findings show that 79% of NPOs consider fundraising to be a challenge. Forty-six percent of NPOs surveyed listed fundraising as a medium to difficult challenge for their organisation.[11] Despite fundraising being a challenge, the NPO sector is still growing. Between 2005 and 2015, there was a 10.4% increase in registered nonprofits in the United States.[10] In conjunction with the funding challenge, NPOs face the issue of trying to meet the demand for their services.[12] The Nonprofit Finance Fund found that 86% of NPOs have increasing demand. Overall, 57% of NPOs reported that they had trouble meeting that demand.[13] In comparison, the BDO survey found that 40% of NPOs believe that managing growth is a moderate or high challenge.[11] The NFF surveyed 3,400 different NPO leaders whereas, the BDO surveyed 100 NPO leaders. These data point to the major dilemma for NPOs being the challenge of obtaining funding to meet the demand for their services.

In terms of fundraising, the National Executive Service Corps (NESC) has consulted over 1,000 different NPOs. The NESC stresses that an NPO's finances should be one of the items at the top of an NPO leader's priority list.[14] This mirrors the enterprise scheme concept detailed by Bryson, Gibbons, & Shaye. If the finances are not seriously considered, then all other interworking parts of the web will suffer.[15] The NESC finds that many NPOs will only make financial decisions in response to operational issues.[14] One reason for this could be that the NPO's leaders are not trained in finance or management.[14] Also, those who start NPOs may only be concerned with spreading the message as opposed to being finance focused.[12] The NFF survey displays this in a statistic that details NPOs' use of data to inform their decision making. For NPOs with less than USD 50,000 in operating income, 39% do not use their data to inform program decision making. Sixty-one percent of small NPOs do not have staff demdicated to collecting that data.[13] This makes sense because a relatively low level of operating income means that the NPO has inadequate funding to pay for staff who would record such data. Seventy-eight percent of NPOs with USD 250,000 to USD 500,000 do use their data to inform program decision making (Figure 3). This trend continues to rise in percentage as the income of the NPO increases. In some cases, NPOs take the step towards better finance. Growing and sustaining a movement is heavily reliant on the ability to raise the proper funds. In many cases, the failure to think in the long term and have a diverse form of revenues will lead to a lack of NPO growth and success.[14]

NPO Use of Outcome Data to Inform Strategic Decision-Making
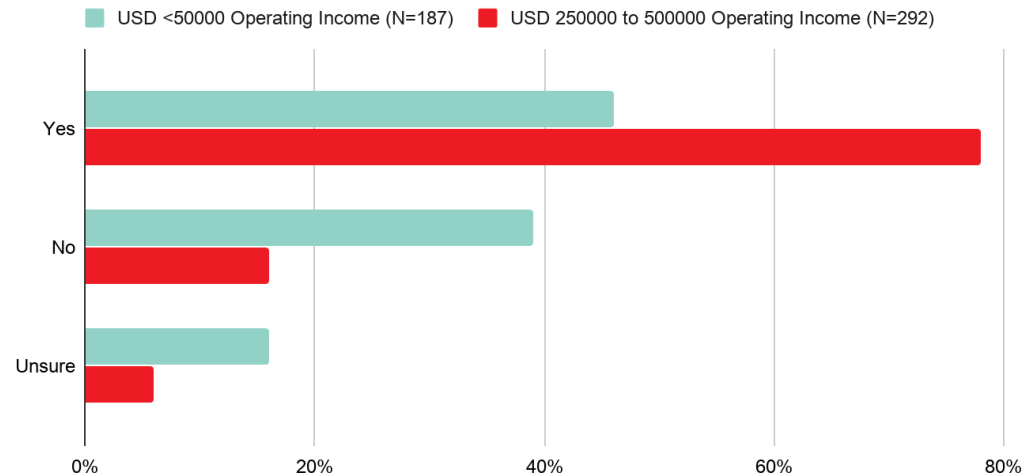

Figure 3. Use of outcome data to plan future decisions compared between varying NPO operating incomes. Adapted from an NFF survey.[14]

NPO Funding Sources

As funding is one of the most important challenges for NPOs to achieve growth, it is critical to understand the potential sources of funding. USD 410 billion was donated within the United States to NPOs in 2017.[6] Seventy percent of this money was given by individuals, 16% was given by foundations, 9% by bequest, and 5% came from corporations.

The Stanford Social Innovation Review analysed 144 NPOs that have above USD 50 million in operating income each year to gauge which funding sources and strategies made those NPOs successful.[8] The study showed that smaller NPOs typically have several types of income streams. These could be any source from government funds to individual donors. When they climb to mid-tier (about USD 3 million in income), NPOs tend to obtain more types of income streams. Around USD 50 million in income, NPOs typically have a localised funding source, meaning that they get around 90% of their funding from a localised sector. This could be corporations, foundations, government, or individuals. While the larger organisations are not spread across all the sectors, they do have diverse funding streams within those sectors.[8] For example, a large NPO may receive 90% of its funds from the government but will have funding from different government departments.

The Stanford Review of 144 different large NPOs, determined that 40% get their main funding from the government, 33% from program fees, 6% from individuals, and the rest were a mix of corporations and foundations (Figure 4). The BDO survey of 100 NPOs, found that program fees were the top earner, followed by investments, individual contributions, government grants, and foundation grants (Figure 5). Some of the inconsistencies between the surveys can be attributed to differences in samples. The BDO surveyed NPOs from under USD 25 million to USD 100 million in income and the Stanford Review surveyed 144 above the USD 50 million
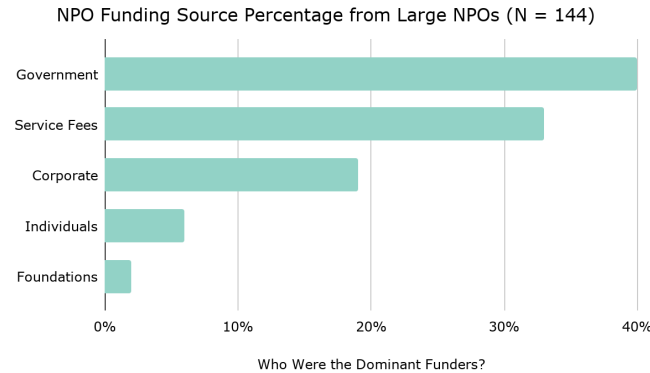

NPO Funding Source Percentage from Large NPOs (N = 144)

Who Were the Dominant Funders?

Figure 4. Adapted from the Stanford Social Innovation Review study displaying the top funding sources for the 144 NPOs interviewed[8]

mark. Differences can be attributed to the BDO study including NPOs with lesser funding, which further supplies evidence that NPOs of different funding sizes have different income sources.

In order to obtain these funds, simply knowing the path is not enough. Going from a small to large NPO takes meticulous planning and the right organisational resources. Therefore, each NPO has to determine which
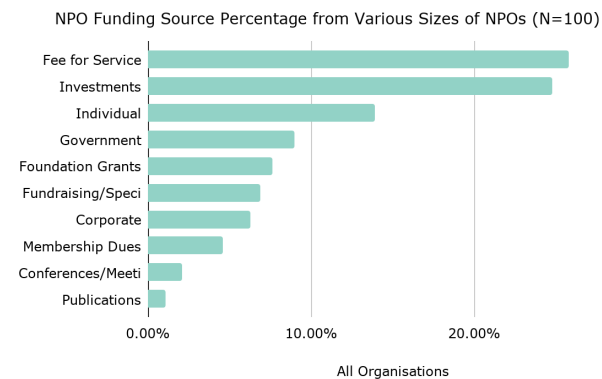

NPO Funding Source Percentage from Various Sizes of NPOs (N=100)

All Organisations

Figure 5. NPO funding sources adapted from the BDO survey from 100 NPOs of various sizes[11]

funding sources are best for them. No two paths are exactly alike and some NPOs may have different metrics of approach than others.[8]

Developing Funding Strategies in the Context of CWA

This project had two foci: creating a plan for CWA chapters to obtain funding and creating a plan for CWA international to obtain funding primarily through corporate channels; these strategies are visualised in Figure 6.

Objective 1: Assess the organisation's current fundraising situation and knowledge on a local and national scale

In order to determine the funding needs of CWA, CWA's current fundraising resources were assessed. CWA has several databases and documents on their Podio software, in their google drive, and their internal communication website called *The Hood*. From these databases, we determined which resources were useful, such as information on previous funding efforts, a small existing list of possible partners, and future goals and projects of the organisation.

For further insight into local chapter fundraising and operations, a survey was initially sent out to 541 CWA chapters worldwide. In total, 41 responses were received. The survey method, consent form, questions, and answers are available in the supplement sections 1-4. This information was compiled into a spreadsheet and the status of the organisation's funding was analysed. Chapters were categorised based on sources of funding such as crowdfunding, corporate, or government funds.

From the survey responses, several chapter representatives who expressed further interest were contacted for an interview. Fifteen chapter representatives from various locations around the globe were interviewed. The interview process allowed for an in-depth
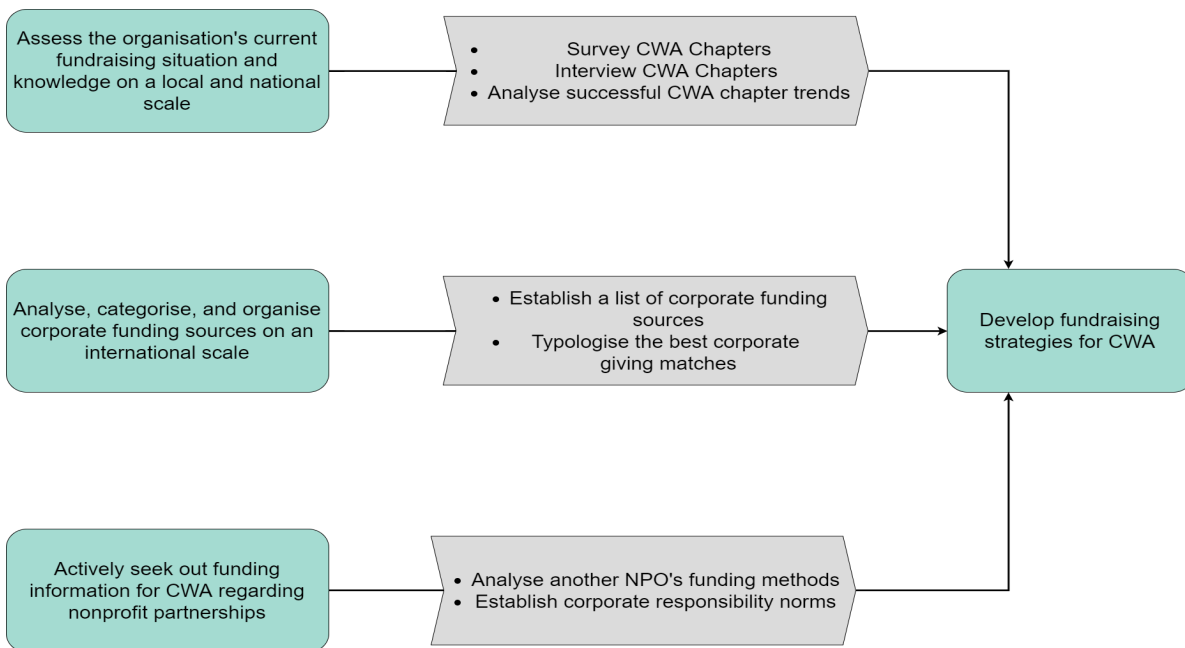
Figure 6. Methods flowchart

look into a chapter's fundraising information and experience. Trends that persisted across interviews were the most important. With these data, important information and resources were obtained for the future development of funding strategies.

To supplement local chapter interviews, representatives of national chapters were interviewed to gain perspectives on their operations and roles. In total, 3 national interviews were conducted over audio calls: Iceland, Ireland, and Sweden. These interviews were analysed in order to assess the impact, importance, and struggles of national chapters. Analysis also focused on the best practices that had potential application for developing funding strategies. All interview consent forms and questions can be found in the supplement sections 5-8.

In total, 41 chapters were surveyed and 16 chapters were interviewed.

Objective 2: Analyse, categorise, and organise corporate funding sources on an international scale

To establish corporate sources from which CWA can obtain funding, relevant information was collected and synthesised. Various corporate funding sources were investigated by reading their corporate social responsibility (CSR) and annual reports. This process was iterative and is illustrated by the flowchart in Figure 7.
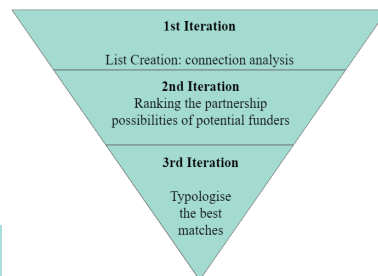

Figure 7. Potential funder list design flowchart

Before thoroughly analysing the specific CSRs and annual reports, large lists of corporate funding sources were established based on simple criteria. Several categories of potential funders were chosen and companies that fit within these categories were added to their category's list. The categories were chosen based on 4 main connections: companies that donate the most money, companies with the highest rated CSR, large Danish companies, and companies with known connections to cycling culture.

After the development of these lists, the focus shifted towards narrowing down the options to the best possible funding sources. This was accomplished using a coloured rating system detailed in Figure 8. For example, a green rating indicated that the potential funder appeared to be an outstanding match for a partnership, whereas a red rating, indicated a poor match. The decision to rate a certain source was made by the group based on a simple analysis of the company's existing CSR. This includes the company's missions, current scope, and giving tendencies. This saved time and allowed for an in-depth analysis of the companies that indicated the greatest potential.

Colour	Meaning
	Apparent Great Match
	Apparent Good Match
	Apparent Mediocre Match
	Apparent Poor Match
	Apparent Local Match

Figure 8. Corporate funding source typology

From the green and purple ranked funders, a typology was created to enhance the selection process. The typology provides increased information from the simple analysis that ranked the funders. This multidimensional typology[26] allowed for multiple factors to be considered. Key factors of funding sources, such as their CSR missions, giving culture,

products, workplace culture, and any connections to cycling culture were analysed. Figure 9 shows an example of the general format of such a typology. The typology allows for easier development of a potential funding approach.

Potential Funder	Potential Partner Connections				
	Mission Connection	Cause to Product Connection	Culture Connection	Resource Connection	Workplace Connection
Clif Bar & Company	- Dedicated to health, fitness, and environmental sustainability - Clif Bar Family Foundation: supports organisations that advocate for pedestrian and bike-friendly communities	- Not direct but Clif Bars are associated with physical activity and the outdoors	- Active and well known bike culture within the company - Idea for the Clif Bar originated after the founder went on a 175 mile long bike ride	- Food bars would not help CWA - Bike culture could open routes for trishaw storage/maintenance	- Offers financial benefits for employees who bike - Company bike rides - Sponsors cycling events - Sponsors a bike team

Figure 9. Funding source typology example

Objective 3: Actively seek out information for CWA regarding nonprofit (NPO) partnerships

Identifying sources of funding was an important step to help CWA. However, it was necessary to attempt to contact potential funding sources to assess the likelihood of establishing a partnership. At the very least, it was necessary to gain information from these potential funding sources. Gaining the corporate side of CSR perspectives is valuable because miscommunications between corporate funders and NPOs can lead to the breakdown of a potential partnership.[9] To supplement the corporate side, other NPOs were also contacted to discuss their process of obtaining funding.

Around 40 corporate CSR contacts were contacted from the group's CWA email. These were chosen from the potential corporate sources lists. The email included a short summary of the movement to acquaint the corporation with the basis of the mission. The CSR leaders were asked to set up a quick phone call or meeting of their choice to discuss the corporation's CSR policies, partnerships, funding potentials, missions, and process for setting up and sustaining partnerships. Of the 40, several declined to participate or did not

respond. However, one interview was conducted with a CSR manager from PricewaterhouseCoopers. The interview results are in supplement section 9.

A list of approximately 30 NPOs was established to gain information about their funding processes. Several different types of NPOs were contacted. NPOs that have a large worldwide scope such as Doctors Without Borders and Habitat for Humanity. NPOs that have the potential for mission overlap with CWA such as the American Cancer Society and the American Heart Association, and NPOs with mission overlap to CWA, which included the National Council on Aging and the Alzheimer's Association. Similar to the corporate interviews, several declined to participate. An interview was conducted with a Senior Director from the American Heart Association and these results are in the supplement section 10.

Objective 4: Develop funding strategies for CWA: A Playbook

Development of the fundraising strategy took several forms but was synthesised into a funding strategy playbook delivered through a PowerPoint presentation. The playbook includes information that was collected, analysed, synthesised, and then organsied from the previous objectives. Results from chapter and national interviews and surveys served as the basis for local chapter funding strategy. Investigations into corporate funding sources served as the basis for CWA International funding strategy. Discussions with funding sources and other NPOs

supplemented the development of strategies for both foci. Recommendations for approaching these companies were also included within the playbook. Altogether, the playbook identified several strategies to best achieve funding at several levels within the movement.

The Hood lacks organisation and involvement, which are limiting its value for fundraising utilisation

Analysing The Hood's resources for helpful fundraising information revealed several insights. The main insight is that the content is good, but that content is unorganised, underutilised, and not user-friendly. These downsides make investigating resources to supplement fundraising difficult and could be stalling fundraising information flow between the chapters. For example, the primary categories are Questions and Discussion and the Knowledge Base. These categories are designed for different usage. However, the implementation of subcategories is confusing for the user due to significant overlap between the subcategory names. For fundraising, The Knowledge Base has a subcategory named "Finance & Fundraising" and Questions and Discussion has a subcategory named "Fundraising." Supplement section 18 contains further examples of confusing subcategories and other issues with The Hood's organisation and underutilisation.

The lack of fundraising engagement is another concern. There are only 9 posts across both fundraising subcategories. Nine posts is extremely low engagement for a topic as critical as fundraising. Lack of engagement can be seen by looking at the subcategory's posts. For example, the post "Fundraising" has 149 views. Ideally, chapters should use the post to help with the fundraising process. There are useful suggestions such as corporate sponsorship, crowdsourcing, care centres, and the government. However, the post lacks brevity. A large graphic takes up half of the

post and only lists the funding sources. Next, there are clickable tabs that display explanations (Figure 10).

Figure 10. Materials within the "Fundraising" post

Some of these tabs have valuable information such corporate funding examples of Zendesk and Salesforce. Other tabs are lacklustre with the social clubs and philanthropist tabs listing TBD under their description. Furthermore, the care centre and government tabs only state that they are a possibility without going into much detail. Lack of engagement can be displayed by the number of times that embedded links were clicked compared to the total post views, which is displayed in Table 1. This is unfortunate because funding is a common difficulty for chapters.

The groups section on The Hood is also an underutilised resource for funding information. 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 2 contains examples of the groups and their current involvement. If utilised correctly, fundraising information could be shared between chapters in their region. Instead, there is no fundraising information in this area.

Link Names	Clicks	Percentage of Post Views
Dementia community Investment	4	3%
Email Template to Corporate	6	4%
General Fundraising Doc	9	6%
New Horizons Seniors Program	2	1.3%
Salesforce Link	1	0.7%
Zendesk Link	3	2%

Table 1. Lack of engagement displayed by link interaction

Group Name	Current Users	Estimated Potential
Australia	4	> 30
Canada	4	> 30
France	5	> 20
United States	7	> 100
Wisconsin	1	> 30

Table 2. Low utilisation of groups within The Hood

Podio has the basis for a helpful funding database but it is not utilised

CWA's Podio site contains databases and the internal operation of CWA. The funding database is currently underutilised and only has one entry, a Zendesk partnership in San Francisco. The Zendesk entry has important information such as a contact, CSR focus areas, outcome, and location. This database entry is illustrated in Figure 11.
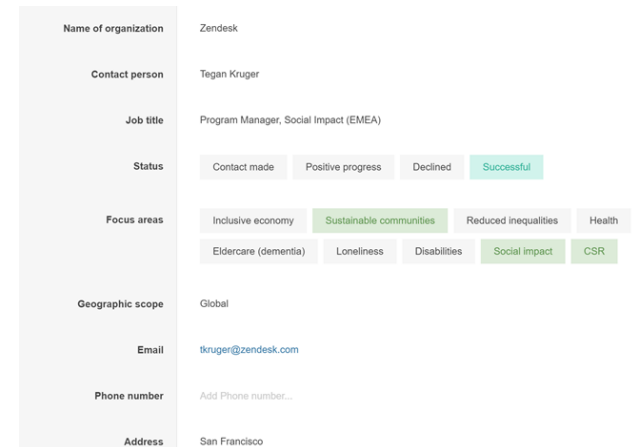

Figure 11. CWA's Zendesk partnership in San Francisco

It was helpful to find that CWA had formed a partnership with Zendesk, but no additional entries effectively prevented this database from being a starting point for funding efforts. CWA has been an organisation since 2012 and many chapters and CWA International have formed partnerships with several companies and foundations such as French partnerships with large insurance companies MACIF and AG2R-La Mondiale. None of these appear in the database. There are other locations with Zendesk partnerships, such as Dublin, which are also not in the database. It is known that

certain chapters have data on other chapters funding. For example, the Barcelona chapter provided funder information for the other 4 funded chapters in Spain. The team requested additional information on rider data and the funder data was attached to that data. Otherwise, potential funders would not have been noted. CWA had little prior knowledge of these partnerships, aside from one corporate sponsorship from Ingeteam. Other funders or even information from these funders were not known and are therefore not in the database. The underutilised database stagnates the fundraising search process and CWA could be missing options for larger partnerships. Furthermore, The Hood contains no feature referencing the database's existence.

Chapters without trishaws are approaching the same types of funding sources as chapters with trishaws

The analysis compared funding sources of the chapters with a trishaw to targeted potential funding sources of the chapters without a trishaw.The results, seen in Figure 12, shows no significant difference in the distribution of funding sources that funded and unfunded chapters approached. If there was a difference this analysis would have greatly influenced our recommendations. However, the analysis does show that government funding and crowdfunding/individual donations are the most common sources which chapters target for funding. This finding correlates to the fact that 70% of all money donated to nonprofit organisations in the US came from individuals (Giving USA, 2018).
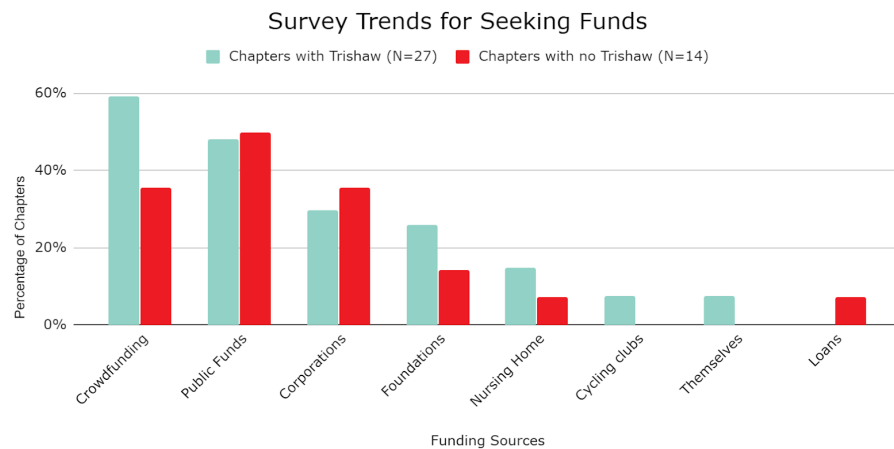
Figure 12. Funding sources used by chapters

Care homes are sources for longevity but not for initial funding

Care homes are sources for insurance, storage, and longevity, but may not be the best sources of initial funding. During chapter startup, care homes are often recommended as funding sources. The survey and interview responses provided an alternative viewpoint to this claim. Of the 27 chapters that have secured funding for a trishaw, only 1 chapter named a care home as their primary funder. Only 7 of the 41 survey respondents listed care homes as an approach to funding. Further analysis of these 7 chapters showed that 3 did not receive funding from a care home. Of the 4 chapters that did, only 2 received money directly from the care home. Those 2 chapters are in Clevedon, U.K. and Townsville, Australia. The Townsville chapter funded their first trishaw from a care home but still listed convincing the care home board as a major difficulty. The other 2 chapters that received money from care homes, Louisville, KY and Solihull, U.K., got the money from care home advertising and sponsorship packages. The difficulty the Townsville chapter encountered was later found in additional chapter interviews.

Only 1 of the 11 chapter representatives interviewed had their chapter funded through a care home. In this case, the Malmö chapter's care homes received funding through loans from the municipality, which the nursing homes paid off. The other 10 chapters found other routes to fund for their trishaw. Interestingly, it has been found that care homes, particularly in the United States are harder to reach as funding sources. There have been several instances of chapters being started by care home staff, but the care home will not provide funding for the chapter. This is true for 5 out of the 7 care home based chapters interviewed. Despite the care homes reluctance to fund the programs, care homes are taking on the program and providing insurance and storage for the trishaw. Care homes are also using the program as an advertising tool for their home. The care home uses the program for advertising in the case of the Brandon, Concord, and Rochester chapters and shows a significant change in attitude from not wanting to initially fund the program. This knowledge is an important factor to know when starting a chapter and especially important when starting a chapter in the United States.

The connections between local chapters and their funders are based on repeatable themes

A myriad of information about corporate and foundation funders and their connections was provided from chapter interviews. The common theme between these funders is a cycling, elder/disability, or location based connection. Figure 13 displays some of these colour-coded partnership connections with cycling connections in red, elderly connections in blue, and location-based connections in green.

French success with insurance companies is an important

example of repeatability of connection-based funding. Two large French insurance firms, AG2R and MACIF, have funded several trishaws. These chapters have benefited significantly from these companies' elderly-based CSR foci. AG2R has a cycling team and this adds to the connectivity between CWA and the funder. Chapters whose funder has operations in the local area such as an office or headquarters is another repeated trend. These connection-based results display themes that could be targeted by other chapters.

Local connections have the potential for larger partnerships

Local chapter partners with recurring themes are also important for the national chapters and CWA International because these partnerships could be larger targets on which to focus. For national chapters, funding sources with a countrywide focus could be their primary targets. The French insurance firms are only sponsoring trishaws in local areas. However, these companies have a CSR connection with the overall purpose of CWA and AG2R's cycling team sponsorship adds to the funding possibilities. It could be possible for CWA France to use these previously established partnerships with either MACIF or AG2R to connect themselves with the insurance companies in the form of a national sponsorship. The same idea can be considered for CWA International. There are several international companies that are represented in Table 3. These include Hidden Hearing, Ingeteam, Orona, and Zendesk. The best potential connection is likely with Hidden Hearing. Hidden Hearing is a multinational hearing aid company that operates through 300 locations in countries with a large number of CWA chapters such as Canada, Denmark, United Kingdom, and the United States. Hearing aids are a clear connection to CWA's elder target audience. Hidden Hearing provides free hearing consultations, which adds a charitable aspect to the corporate side of the company. The charitable aspect would likely mix well with CWA's principle of generosity. Building upon these connections could lead to a prosperous partnership and there are many other possibilities to be found and pursued.

National Chapters provide important support but lack succession plans for longevity

CWA Iceland, Ireland, and Sweden revealed the major impact that these national chapters have on the local chapters. In the case of Iceland and Ireland, only one person maintains the role of the national chapter. For Sweden, there is a decentralised board of 6. Despite the lack of centralisation, these national chapters provide significant support for their local chapters. This support ranges from dealing with trishaw issues to helping chapters get off the ground. A detailed list and large scope of support given to chapters can be found in Table 4.

Table 4 illustrates several similarities in support that different national chapters provide. Typically national chapters advise chapter fundraising and market the movement. Differences are minimal but can be seen with CWA Sweden. CWA Sweden provides insurance to chapters and typically handles chapter start-up as opposed to chapter continuation. CWA Iceland and Ireland are similar in operation. A unique feature of CWA Ireland is the network of connections built by the chapter's leader who has years of experience with CWA and many other causes, which allowed for the development of a network of connections. This network of connections has been critical to the success of CWA Ireland and allows for the connection between potential funders with chapters that may be in need. All three of these national chapters

National Chapter	Support Provided to Chapters
Iceland	• Advises chapters (fundraising, operation, startup, volunteers) • Chapter workshops • Deals with trishaw questions • Facilitates a travelling trishaw • Marketing the movement (Events, meetings, etc.) • Visiting chapters
Ireland	• Advises chapters (fundraising, operation, startup, volunteers) • Compiles information about effective chapter operation • Deals with trishaw questions • Facilitates a community trishaw for marketing • Maintains a network of connections (companies, pilots, politicians) • Markets the movement (TV interviews, politicians, etc.)
Sweden	• Advises new chapters (fundraising, volunteers) • Covers chapter insurance • Deals with trishaw questions • Facilitates a lending trishaw • Expanding the movement • Markets the movement

Table 4. Support provided by national chapters

provide important support and are the reason why chapters in their countries have been so successful. In total, chapters under CWA Iceland have 20 trishaws, chapters under CWA Ireland have 27, and chapters under CWA Sweden have 17 trishaws. Each national chapter is looking to expand their efforts and increase the reach of CWA in their region. However, achieving these goals remains difficult as all three national chapter leaders are doing the work on a volunteer basis. These plans could stagnate because none of these chapters have succession plans. If one leader could no longer continue their work, the country's movement and fundraising would suffer.

A demo or loaner trishaw has emerged as a model to successfully fund CWA chapters

One of the most repeated stories and insights provided during the interview process was that a demo or loaner trishaw made a significant impact for many chapters. All of the national chapter representatives that were interviewed stated that their chapters have either a loaner or demo trishaw that helps support the movement. These impacts can be seen in Table 5. Most notably, the Ireland national chapter was able to use the trishaw to convince local political figures to become supporters. In Ireland, rickshaws, which are similar to trishaws, have a negative connotation and are on the verge of being banned. The trishaw was presented to a politician to convey the difference, which was a critical step in ensuring CWA Ireland's longevity and success.

There is no doubt of the impact of demo/loaner trishaws for local chapter funding either. The chapter in Brandon, SD is a prime example. This chapter was stagnant for one year before the chapter's head was connected with another nearby chapter. This nearby chapter offered their trishaw during their winter downtime. Although unable to ride outside, the Brandon chapter was able to use the trishaw indoors to convince the care home board, who were previously sceptical of the program, to offer the program. The trishaw was also used as a tool to convince funders at a fundraiser, which allowed for the purchase of the trishaw. In fact, the care home now utilises the CWA program on tours. This is a significant switch from being sceptical to utilising the program as a resource. Examples of a demo/loaner trishaw or notes on a trishaw's effect can be seen in Table 6.

Alternatively, chapters that are not able to get loaner trishaw can be negatively affected. For example, the Stockton on Tees Chapter in the U.K. asked to borrow a trishaw from a nearby chapter. Unfortunately, the chapter did not loan their trishaw. The chapter has raised nearly USD 5,000 from grant writing, which is not enough for a trishaw. To cover the rest, they hoped to get more potential funders, such as local businesses, to donate funds. These funders wanted to see the trishaw and without a practical demonstration, the chapter may not

National Chapter	Demo/Loaner Use	Impact
Iceland	Have a travelling trishaw named the Thorvaldsen bicycle and care homes take turns borrowing it	Allows care homes to take on an extra trishaw for extra rides
Ireland	Community-based trishaw for marketing and demo	Critical for Irish Chapter success and spreading the CWA message through events and media (TV interviews)
Sweden	Demo trishaw for new chapters	Difficult to take the trishaw from existing homes. Demo trishaw helps convince supporters and care homes to get on board

Table 5. National chapter's demo or loaner trishaw use and impact

Chapter	Use of a Demo/Loaner Trishaw	Trishaw's Impact
Brandon, SD, United States	Yes	Reinvigorated fundraising efforts and convinced care home board to pick up the program
Concord, NH, United States	No (Impact from their 1st owned trishaw)	Trishaw provides a positive effect on the residents and helps get people on board for the program
Helsingborg, Sweden	No (Impact from their 1st owned trishaw)	Used their first trishaw to convince for more funding. Now have 4 trishaws
North Shore, Canada	Yes	Loaner trishaw from Vancouver to build enthusiasm
Twin Cities, MN, United States	No (Impact from their 1st owned trishaw)	Showing the care home his trishaw and convinced the care home to use the program

Table 6. Information on the trishaw's impact

be able to obtain the funding. This further illustrates the contention that demonstration trishaws are one of the most impactful tools for chapter funding.

Loans are a compelling and unique strategy to fund a trishaw

While there is not a lot of current data on the model, loans could be a practical solution to funding for trishaws for many chapters. This loan strategy was revealed from the CWA Sweden national chapter interview. The national chapter head, revealed that at least 6 of the 10 trishaws in Malmö were bought by care homes through a loan facilitated by the municipal government in Malmö. The exact rates are not known by CWA Sweden, however, the cost was compared to the weekly cost of a Zumba class for the care homes. The only other example of a loan being used comes from a survey response from the Clonakilty chapter in Ireland. They borrowed money from the bank for insurance and paid back the loan using local donations and sponsorship from a local hotel. Loans could be a practical solution for chapters with a good fundraising plan. For example, Stockton on Tees has raised around half the cost of a trishaw. Many chapters try to raise all the funds and then buy the trishaw. If a chapter were to take out a loan and get the trishaw, then that trishaw could also be used to supplement further fundraising. For example, Stockton on Tees has had several potential funders ask to see the trishaw. If they took a loan for the trishaw, they could use the current USD 5,000 raised to pay to loan and use the trishaw to raise more funds.

The importance of data for funding is undervalued

Chapter representatives that were interviewed provided their opinions and practices on data usage. Of the 18 chapters (local and international) that were interviewed, 7 had some sort of method or planned method for data collection. On a simple level, both CWA Iceland and Ireland know where the trishaws are and how many each chapter owns. CWA Ireland is also aware of the funding sources for each trishaw. This helps CWA Ireland understand which funding sources are the most successful and recommend likely funding sources to chapters. Without this data collection, chapters in Ireland would not be so well funded.

The Barcelona Chapter head facilitates data collection through email and uses a template that has volunteers fill out the number of riders, the age of the rider, and the gender of the rider(s). This data collection allows Barcelona to track and accumulate the total number of rides, riders, and trishaws for their own chapter and for all other operating chapters in Spain. These data are used to get continued funding from the municipality of Barcelona and the Catalan Government. Furthermore, a database of funders of each chapter is compiled by the Barcelona chapter. It is not known if Barcelona uses

the funders of other chapters to facilitate further funding by approaching other local branches of previous funders, but the potential is there. The chapter in Rochester, MN is taking a similar approach to data collection. They plan to collect information on the number of rides, riders, experiences from the rides, and make note of noticeable changes in the rider's mood. They plan to use these data to support the program further. Potential funders may be easier to convince if they can see the impact and scope of that CWA program. Overall, it is clear that data collection, analysis, and presentation can provide a net benefit for chapters when it comes to gaining funding and support.

Mission fit is essential to companies when looking at forming partnerships or donating to NPOs

While reaching out to CSR leaders in companies for NPO partnership perspective, the most critical response came from a CSR manager at PricewaterhouseCoopers (PwC). The first key point of information was the importance of mission fit in a company's decision when forming partnerships or donating to NPOs. Without a good mission fit, companies are less likely to form a partnership. Finding companies that want to achieve the same mission that the NPO is trying to achieve is an effective way to form sustainable partnerships. CWA already demonstrates the importance of mission fit when considering the current funding sources, such as AARP, MACIF, or Malakoff Médéric (all insurance companies that have funded individual CWA chapters).
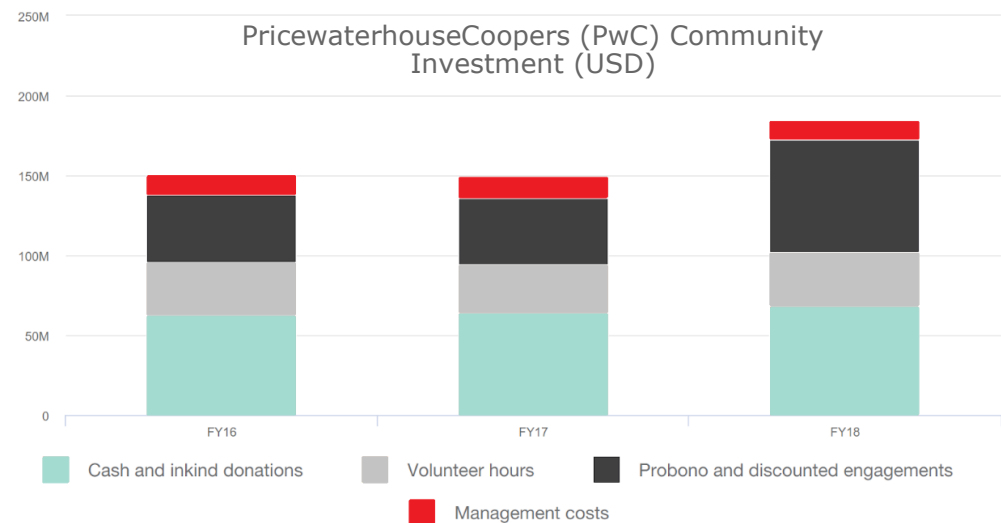
Figure 13. Adapted graph from PwC's annual CSR report displaying the increase in total dollars donated. Specifically, the increase in pro-bono and discounted engagements[27]

Another important discovery was that many global companies' CSR are moving towards employee volunteerism as opposed to companies solely donating money to NPOs. This trend is displayed in Figure 13 with the increase of pro bono and discounted engagements donated, as reported by PwC.

Also reported in the PwC interview was that this shift is largely because donations don't generally lead to long/effective partnerships, and forming long term partnerships allows for the greatest CSR impact. Through employee volunteerism, companies can contribute greatly through their workforce, especially by utilising valuable skills that their employees have[28]. As employee volunteerism grows and companies work to build long term partnerships, the importance of having a close mission fit becomes more valuable and sustainable in the context of forming partnerships.

Funding networks are essential to building a well-funded non-profit

An important step was gaining information from other NPOs on how they manage their fundraising strategies and work with companies to build strong, long-lasting partnerships. The senior director of the American Heart Association (AHA) of Central Massachusetts stated that, for large organisations to fundraise effectively, a robust funding network is necessary. Each AHA chapter accesses the same database of connections and often communicates with nearby chapters regarding events, seeking advice, or sharing best fundraising practices. The AHA of Central Mass. also runs fundraising events such as galas and is involved in other events that promote heart health. These techniques allow the AHA to fundraise very effectively throughout the country through independent chapters. This connects to the need for CWA to build a database and utilise that database to explore its connections.

The connection analysis provided a good basis for identifying funding sources

Using a simple connection criteria method resulted in a list with 143 potential funders. This list was large enough to be comprehensive but not too large to identify the best possible funders for CWA. Figure 14 displays the breakdown between the number of potential funders in their funder connection category and the rankings in each category.

The colour ranking system demonstrated that certain surface level connections were more important than others

The colour ranking system provided a quick way to narrow down the potential funders to those that are most likely to fund CWA. This method revealed several trends. The first and least surprising trend is that cycling-connected companies provided the highest number of great matches. There were 14 great matches in total and the cycling
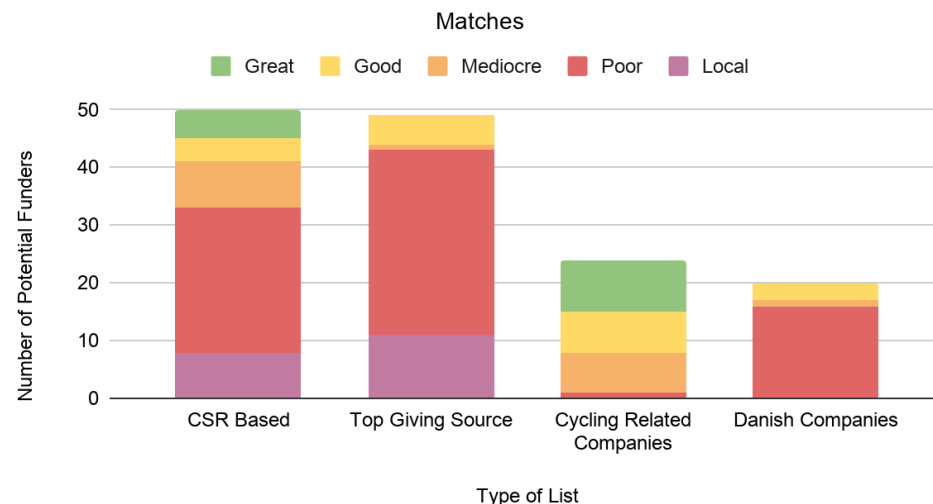

Figure 14. Rankings of potential funding sources added to each funder list

connected companies provided 9 great matches. This is not surprising considering that companies with cycling-related interests would find a connection within CWA. The other 5 great matches were all from the highest-rated CSR companies. The top giving and Denmark based companies provided no great matches. Another unsurprising trend was that the top giving sources provided the highest percentage of poor matches. Table 7 shows these percentages across all the categories.

This high percentage of red matches was due to many of the top giving companies having their CSR focused on helping developing countries or the companies not accepting unsolicited proposals. Therefore, there was a high potential that these companies would not have many connections to CWA itself. There were 14 sources from that list that were immediately marked red because their CSR platforms appeared to only support employee matching programs, which are not part of the focus of this project.

The top giving companies list provided the highest number of companies that were marked as local matches. This was not surprising considering that several of the funders on the top giving companies list, that matched CWA, listed their CSR foci primarily in the local community. A good example of this is Walmart. Walmart is a large company which bases their CSR approach towards serving the communities in which their stores are located. In total, there were 20 local matches. The top giving companies list provided 11 local matches

and the highest-rated CSR companies list provided 8 local matches.

The largest surprise from the funder lists was that Danish Companies did not provide many important matches. The breakdown can be seen in Table 8.

Surprisingly, the Danish companies provided no great matches and a high number of poor matches. Most of the Danish companies analysed did not have the best mission fits with CWA. Large Danish companies mission fits

Colour Rank	Number of Matches
Great (Green)	0
Good (Yellow)	3
Mediocre (Orange)	1
Poor (Red)	16
Local (Purple)	0

Table 8. Match analysis for Denmark based companies

Figure 15. The total number of matches by colour from funder list categories

were similar to the top giving companies and had focuses dealing with youth, poorer areas, or would not accept solicited requests. The companies that were matched as good included Novo Nordisk. Novo Nordisk did not appear to have a great fit with CWA but bases their CSR around preventing diabetes. Diabetes does have an effect on CWA's target audience, however, this mission is not aligned with CWA at first glance.

The overall spread of colour matches was distributed across all categories is illustrated in Figure 15.

This overall list displays that the number of poor matches outranks any of the other matches with the percentage at 51.7%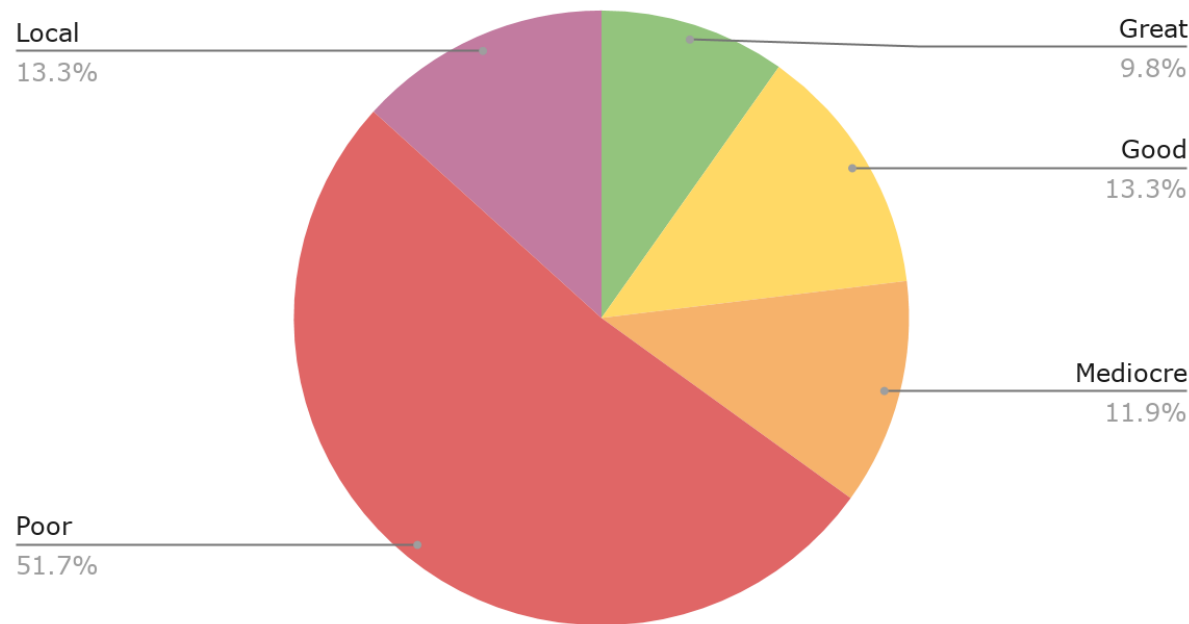. The other matches are all close in the number of matches with percentages ranging from around 10% to 13% for each category. Part of this stems from it being easier to determine a CSR that will fit than a CSR that won't fit. Any funders placed in the red section were determined to be definite poor matches from CWA. Any match that may have potential was rated with at least the mediocre or local rating. The local rating was unique because it was used for companies that allow their local locations to decide which NPOs to support or are not looking to support organisations on a national or international level. However, deciding between mediocre, good, and great was a subjective process based on looking through the companies' CSR statements. Great matches were deemed the most likely to match with CWA. However, this does not rule any funder out in the good and mediocre categories. These funders may also have potential that was not recognised during the analysis process. The reason for having three rankings: great, good, and mediocre, was so that only the absolute best matches were typologised. This ranking system also allowed these good and mediocre matches to not be ruled out as potential funders.

The typology contains 31 company in total and CWA can add companies as they wish in order to store future potential partnership ideas.

Typology development revealed the factors that connect CWA with the most likely funding sources

The ranking of the potential funder list resulted in the great and local matches being broken down into more detailed typology, which totalled 31 companies. Potential connection factors that lead to successful nonprofit partnerships were assessed and ranked using the same ranking system as the potential funder categories. It was found that even though the company match was great this did not mean that all of the 5 connections would be the same Table 9 shows a snapshot of the typology with this ranking method.

workplace connection applies to the opportunities that the company encourages, or offers its employees regarding community outreach, cycling infrastructure, and donation matching. The workplace connection should be used to supplement the mission and culture connections to demonstrate how the company's employees could get involved.

The last two connections, the cause to product and resource connections, are the most situational. The cause to product connection only exists if the company sells a product and if that product has a connection to CWA. For example, Clif Bar produces energy bars which are connected with outdoor

Potential Funder	Potential Partner Connections				
	Mission Connection	Cause to Product Connection	Culture Connection	Resource Connection	Workplace Connection
Clif Bar & Company	- Dedicated to health, Connectionness, and enviromental sustainability - Clif Bar Family Foundation: supports organisations that are working to conserve the wild, open spaces, advocate for pedestrian and bike-friendly communities	- Not direct but Clif Bar is assocaiated with physical activity and the outdoors	- Active and well known bike culture within the company - Idea for the Clif Bar originated after the founder went on a 175 mile long bike ride	- Food bars would not help CWA - Openness to bike culture could open routes for trishaw storage/maintenance	- Biking encouraged within the workplace: Offers finacial beneConnections for employees who bike (Money towards bikes and bike accessories) - Company bike rides - Sponsors cycling events/a bike team
New Belgium Brewing	- Enhance life - Use business for good - Invite cultural, social, and environmental change - High involvement culture	- No product Connection - Could sponsor events with beer?	- Active in the community - Hosts 3-dity bike tour - Gives employees a bike after 1 yr anniversary - Logo is a bicycle, most popular beer is bike related	- Has volunteer network - Events can be used as sponsorship/promotional opportunities	- "Every day is bike to work day" - "Platinum-level Bicycle Friendly Business" designated by League of American Bicyclists
REI	- Get more people outside - Create access to outdoor spaces - Operate sustainably	- Active clothing and recreational equipment	- Giving/sustainability - Outdoor activities	- Employee volunteer network - Donates 70% of proConnection to outdoor community	- Employee bike rides daily - Works with Washington Area Bicyclist Association
Patagonia	- Dedicated to environmental stability and good products	- Active/outdoors clothing/accessories	- Encourages outdoor activity, ourdoors, employee activism	- Employee volunteer network	- Ourdoorsy culture, they hire primarily people who enjoy spending time outdoors

Table 9. Part of the larger typology, showcasing the connection rankings

Out of the 5 connections: mission, cause to product, culture, resource, and workplace, mission is shown to be the most important connection as it is the most common, recurring connection. All 31 companies contain a mission connection and this connection must be at least a mediocre rank before other connections can be made. The second most common connection is the culture connection. This connection should be made when CWA reaches out to funders to further show the ideals that they share. The

activities and therefore CWA should use this connection to supplement a potential partnership. Likewise, resource connections relate to the services a company provides, especially if they would provide them pro-bono. One example of this is Edelman, which is a communication company that specialises in marketing and has done it pro-bono in the past. CWA should use this connection when negotiating a partnership to show what skills the specific company can bring to the table that others cannot.

Developing Funding Strategies for CWA: A Playbook

The cumulation of the findings and analysis of the project resulted in the development of a playbook for CWA. There are two versions of the playbook, one for local chapters and one for the international chapter. The playbook is primarily based on obtaining funding or elements that could help with obtaining funding. Chapter suggestions include information such as common connections to look for when reaching out to partners and to ask nearby chapter for fundraising help. CWA International playbook strategy has two main foci, funding for the international itself and how the international can boost local and national chapter funding. For the international, the typology and a list of funding sources should provide a basis for funding connections. Focus on improving local and national funding will help ease stress on the international chapter and allow it to focus on expanding the movement and securing its own funding. The playbook can be found in supplement section 19.

Conclusion

CWA chapters around the world are bringing social change to their local communities. However, the high costs of trishaws and operation can be barriers to this change. To help CWA chapters of all levels fundraise successfully, information on the best funding practices were collected. This includes communication with various chapters, finding connections with corporate sponsors, and utilising a demo trishaw. Funding for CWA International was approached in two ways, development of a funding source typology and interviews with industry leaders on nonprofit partnerships. The primary findings and strategies were accumulated into several recommendations and strategies that are packaged into this report and a playbook that CWA can use both use itself as well as provide to both local and national chapters.

Recommendation 1: CWA should build a database and network of funding sources and partnerships

CWA's connections are not being used to their full potential. There are many examples of local chapters and CWA International establishing partnerships. However, documentation of these relationships should be improved. The ability to access previous funding attempts would be immensely helpful to those working with CWA now or in the future. The database would benefit all levels of the movement: local, national, and international. A database provides a helpful basis for chapters by allowing the movement to learn from its past and enable future success. The network of funding sources would be built upon the database. When funding sources get added to the database, the number of contacts increases. As more funding sources are added, the opportunity for chapters to network together also increases. If a chapter in Canada finds a company that has already funded a chapter in Ireland, that Canadian chapter could use the Irish chapter as a source of information to help develop another partnership. Funding efforts should be added by all levels of the movement to ensure that the database is holistic.

There are several ways to develop this database. Their Podio platform has a database for funders, which is not utilised and could be the basis for the database. However, CWA has moved away from Podio as a chapter platform so a database would be better equipped on The Hood. Chapters could submit database entries and CWA staff or Hood moderators could review and add them to the list. Useful information in the database should include company/funder name, contact information, CSR focus areas, how/why the partnership was formed, location, and status of the partnership.

Developing the database will likely be time consuming and relying completely on CWA staff for development would be unrealistic. To mitigate time expenditure, CWA is working with a group of 12 students from Canadian universities for 9 months. The program is named the Next Gen Changemakers program. These students will be gaining nonprofit experience by working in two teams, a fundraising team and operations team. These teams could combine efforts to build the database. CWA's development director should be responsible for adding CWA International funding efforts that are in progress or completed.

Recommendation 2 - Explore identified local chapters' funding connections

To supplement the funder database, CWA should work to expand upon the notable funding sources that were found from researching local and national chapters. There are several examples that were found where local chapters established connections with local branches of larger corporations. Most of these larger corporations have connections to the movement's mission as a whole. For example, there are corporations with connections to cycling and the elderly or disabled. These connections should be explored and expanded upon primarily by the development director because he is in charge of the movements larger funding. The Next Gen fundraising team could supplement him in these efforts. Furthermore, the Next Gen team could attempt to find more examples and expand upon the connections that were uncovered.

Recommendation 3 - Assess and utilise developed funder lists and typology

The development director and the Next Gen funding volunteers should utilise the funder list and typology. The funder list identified the funding matches that were best for CWA. The typology went into further explanation for the best identified matches. Types of connections, such as mission and company culture, were recorded and ranked based on a funding connection's fit with CWA.

These fits should be used as a basis for reaching out to the funding sources. Funding sources want a mutually beneficial partnership and any connections to the source should be highlighted to meet this requirement. For example, a company that encourages biking to work or other cycling related causes should be explained that CWA is committed to the same cycling mindset. It is also crucial to let the funder know the expectations from the partnership such as desired money and scope of the partnership. Highlighting previous partnerships with other corporations could also help convince the potential funder of the legitimacy of the program.

Recommendation 4 - Improve chapter collaboration and discussions

CWA staff, the Next Gen operations team, and Hood moderators should be in charge of improving chapter collaboration. There are many examples of chapter communication and discussion leading to successful funding and group cohesion. Currently, CWA's communication resources are missing or underutilised. First and foremost, chapters should be encouraged to collaborate as a part of their onboarding process. This includes ensuring that chapter best practices should be shared along with trishaws if possible. Secondly, resources and organisation within The Hood need to be made friendly for users. Currently, fundraising communication on The Hood is minimal and encouraging these discussions could be the key to improving chapter fundraising. A chapter map feature on The Hood would help new chapters identify nearby successful chapters to ask for fundraising or general help. The Hood also contains a group feature that is underutilised. Placing chapters in these groups during onboarding process could help improve communication and sharing of best funding practices. Supplement section 17 contains further discussion of these recommendations.

Recommendation 5: Distribute the playbook to chapters

The playbook was designed to help give funding advice and recommendations to both local chapters and CWA International. This must be distributed to local chapters in a way that is useful and not overbearing. The Hood is a good place for distributing to already established chapters. Distributing the playbook upon the awarding of chapter affiliate status should also be implemented to make sure these chapters are in the loop right away.

Implementation Plan

Several implementation resources are available including CWA Staff, such as the development director, both Next Gen teams, and The Hood's moderators. The funding database should be brought onto The Hood or stored in another database if The Hood is not a viable option for database storage. The Hood can be the basis for several more recommendations such as chapter communication improvement and adding and improving features. These implementations such as the group or map features can be handled by the Next Gen operations team. Funding sources within the typology should be utilised as soon as possible by the development director and the Next Gen fundraising team.

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