



# WPI



## **REEVALUATION OF CYCLING WITHOUT AGE IT STRATEGY**

Aiding a nonprofit in creating a concise IT strategy to allow for the NGO's continued growth

**Codey Battista**  
**Lily Lancellotti**  
**Kristin Lavoie**



# WPI

## **Reevaluation of Cycling Without Age IT Strategy:**

**Aiding a nonprofit in creating a concise IT strategy to allow for the NGO's continued growth**

**By:**

Codey Battista  
Lily Lancellotti  
Kristin Lavoie

Report Submitted to:

WPI Faculty Advisors  
Professor Peter Hansen  
Professor James Hanlan  
Worcester Polytechnic Institute

Project Sponsor  
Cycling Without Age

Denmark Project Center  
Copenhagen, Denmark  
Date: May 1, 2023

An Interactive Qualifying Project Final Report  
Submitted to the faculty of  
WORCESTER POLYTECHNIC INSTITUTE  
In partial fulfillment of the requirements for the  
Degree of Bachelor of Science

*This report represents the work of WPI undergraduate students submitted to the faculty as evidence of completion of a degree requirement. WPI routinely publishes these reports on its website without editorial or peer review. . For more information about the projects program at WPI, please see <https://www.wpi.edu/project-based-learning/global-project-program>*

# Abstract

Cycling Without Age (CWA) is a non-profit organization dedicated to improving the lives of seniors through trishaw rides. In recent years, the organization has been experiencing rapid growth which is putting strain on their IT system. The main challenges they have faced exist within the lack of integration, decentralized web presence, and their booking system. Our team's project and recommendations outline how CWA can alter their IT strategy to be effective for years to come.

# Executive Summary

**Having an IT strategy is essential to the growth and development of an organization or business.** This strategy outlines the purpose of each technological system or platform that is used, including the need it satisfies alongside its integration with other platforms in the system. Without this strategy, it is impossible to continue with the same rate of growth sustainably. Such was the case for Cycling Without Age (CWA), a nonprofit organization that aims to give elderly people the opportunity to feel the wind in their hair, and experience riding a bike even if they cannot do so physically. **As they have grown to over 2700 chapters around the world, it has become clear that their disorganized technological landscape may be hindering their ability to continue spreading their impact. Our goal with this project was to analyze their current strategy, needs, and systems to prepare for further growth.**

**An analysis of CWA's current IT strategy was critical** so that a new strategy could be developed for their continued growth. During the analysis, CWA's values and resources were prioritized so that the integrity of the organization was kept. **Our first objective included identifying the needs of CWA.** This involved evaluating the effectiveness of various platforms that are used in the current IT landscape. To do this, interviews with CWA leaders such as Ole Kassow, Pernille Bussone, and Christian Persson were carried out while surveys were sent out to partner and affiliate chapters. After this necessary step was taken, **our second objective was to determine if there are better systems available** that would make the IT landscape a more organized and efficient environment. We took the interview responses as well as survey data and conducted follow up interviews in order to do this. Follow up interviews with various chapters gave us an in depth look at what other systems could be utilized for different tasks. Lastly, **our third objective included developing and recommending an IT strategy** that CWA could implement in the future. All data from interviews and surveys were consolidated and discussed, ultimately resulting in two alternative solutions and general recommendations.

Throughout the process, **a multitude of interviews were conducted while various chapters** were responding to the surveys we sent out via email. We talked to the founder of CWA, Ole Kassow, the Global Community Captain, Pernille Bussone, and the IT Analyst, Christian Persson. Each of these CWA leaders spoke on the current CWA IT strategy relating to their position in the organization. While this was occurring, **surveys were sent out to partner and affiliate chapters separately.** We received a total of 16 partner responses ranging from 15 different countries around the world. In addition to this, we also received 15 responses from affiliate chapters, however, coming from a smaller range of only 5 different countries. After surveys were sent out, follow-up interviews were organized based on certain questions in the survey. There were a combined 6 follow up interviews that consisted of 2 partners and 4 affiliate chapters. They all showed a combined interest in explaining their IT landscape in depth for the future of CWA.

Beginning the **interview** process, we first talked to CWA leaders in order to develop a baseline understanding of the IT strategy in the organization. From this we gained not only

knowledge of what platforms are used, but also what needs they fill, alongside any gaps in the strategy. **The most valuable outcomes of these interviews were the knowledge of the shortcomings of WordPress, lack of development to Book2Go, and general lack of organization and support for starting chapters.** Book2Go in particular was something they really placed emphasis on, as it was a booking platform made by CWA, for CWA by Christian, as the IT person, and he wanted feedback for how it should continue to be developed as it is nowhere near full potential. He also had a lot of valuable input regarding where he finds difficulty in the system based on questions and emails he receives from chapters. From these interviews we were able to structure surveys for both affiliates and partners to gain insight towards the technological needs of the organization, as well as gain perspective for what our partners were looking for.

In these **surveys** a variety of questions regarding website, booking system, fundraising, and marketing were asked to the different parties in order to understand their particular landscape and needs. We saw trends between people who did, or did not, use different platforms for different reasons. One difference between the affiliates and partners was that **fewer affiliates prefer WordPress than partners do.** This, we learned, has to do with the usability of the website as well as how it is set up with different restrictions. They also claimed that this site presence was a priority for them in order to publicize their organization and help or guidance in this space would be beneficial.

**Book2Go received a lot of feedback from both the partners and affiliates,** which was useful as partners don't use Book2Go, but their affiliates may. For those using this booking platform, there was a surplus of feedback regarding how it works for them, and ways that it could be developed further to work better both regarding minor technical improvements, as well as direction to satisfy needs of the app. If chapters did not use Book2Go, it was not uncommon for them to say their chapter needed an effective booking platform, and so this platform could satisfy those needs.

Another thing many chapters desired was organization, and ways of **keeping track of this financing and fundraising endeavors.** Here we introduced the idea of using a **Customer Relation Management (CRM) system,** in order to help with this structure, delegate tasks, and prioritize how their chapter runs. Finally, we asked them about the CWA community, and if or how they used **The Hood,** a discourse forum. This resulted in a discussion of its lack of structured categories and accessibility, in contrast with its future potential.

After reviewing surveys and interviews, we analyzed the platforms CWA currently uses in order to suggest how to most effectively utilize their resources. **The platforms that caused the most challenges for partners and affiliates were Book2Go and WordPress.** Book2Go, the booking platform created by the CWA IT expert, is currently functioning at approximately 10% of its full potential. **There is still a lot of development that must go into Book2Go.** The features CWA needs to prioritize while continuing to build Book2Go were determined through our surveys and interviews. These features most notably include introducing updated permissions, more efficient ride bookings and further development of affiliate pages. In order to



further improve Book2Go, adding a CRM and integrating the platform with WordPress would be valuable to the organization.

**A CRM (Customer Relationship Management) platform would help CWA organize and prioritize their information.** If connected to Book2Go, the information on active chapters, pilots and riders would update automatically and be readily accessible. Monday is a CRM platform that has been tested amongst a CWA partner and has great potential to work for CWAI. Alternatively, a CRM, such as CiviCRM, could be based on the CWA website but this would put more pressure on the WordPress site and require adding more pages to the CWA WordPress.

**Since WordPress has proven to be confusing to new users,** our team focused our recommendations on creating a more unified web presence for CWA by **moving affiliates away from WordPress usage completely or providing templates for setup** to encourage more affiliates to have a WordPress page. Creating templates to help affiliates begin their website creation process would make chapter leaders more inclined to create a WordPress page. Furthermore, editing permissions need to be updated so that affiliates are only able to adjust their own page on the WordPress site. This will eliminate the fear new users have of accidentally altering other chapters' pages. By introducing these changes, affiliates will feel more comfortable using the CWA provided WordPress.

Besides the analysis of the potential platforms CWA can utilize, a particular emphasis was placed on **integration of each of the services.** The CWA leaders wanted a way for a user to have a **Single Sign On (SSO) through their CWA email** to access all the necessary applications. In order to satisfy this need, our team recommended **two possible solutions: an enterprise integration dashboard and WordPress integration.** An enterprise integration dashboard would allow CWA users to log into an application dashboard that would display all the necessary platforms, current CWA news, and IT resources. This platform would be fully customizable for the user's needs, but also potentially costly. The different platforms and respective costs are detailed within the recommendation and appendices sections. **The second option would be further developing the WordPress site to include a Book2Go, The Hood, and donation plugin.** This would be directly linked to the user's WordPress login so that they are able to access all the necessary information without leaving the webpage. This is a less innovative option but would be more cost effective for the CWA organization.

Ultimately, by speaking with several members of the CWA organization, receiving survey results from participants across the world, and better understanding CWA's mission and purpose, **we have determined the needs of CWA's IT Landscape.** We have developed **recommendations** based on these findings that will allow CWA to continue to grow to impact individuals around the globe.

**Our most notable recommendations include following one of the integration strategies provided, further development of Book2Go, updates to WordPress permissions, added structure to The Hood, and adoption of a CRM.** Since adapting all these recommendations will take a lot of commitment, Book2Go and WordPress improvement should take priority over the additional recommendations. Furthermore, gauging the interest of

volunteers in helping CWA adopt this new IT strategy is necessary. The development of our proposed strategy could also become a great MQP for Computer Science, Data Science, or IMGD students. Ultimately, prioritizing the uptake of our proposed strategy will be extremely valuable to the Cycling Without Age community.

# Acknowledgements

We would like to extend a special thank you to all of the individuals that contributed to the success of our project. This project would not have been possible without the support of all the knowledgeable people we've encountered throughout our IQP journey.

First, we would like to thank our advisors, Professors Peter Hansen and James Hanlan. Each of you provided prompt and excellent feedback throughout the entire semester and ensured our IQP experience was as memorable as it could be. Our team couldn't be more grateful.

We would also like to thank our sponsors, Ole Kassow, Pernille Bussone, and Christian Persson. We loved getting to experience the Cycling Without Age community and work with each one of you. The work you are all doing for communities around the world is inspiring and we are so thankful to have gotten the opportunity to help further your organization. Our team loved getting to meet individuals from the CWA organization around the world and would like to extend a special thanks to each survey respondent and interviewee for providing us with the feedback necessary to complete our project.

Lastly, we would like to thank our ID2050 professor, Alex Sphar, and everyone else who made contributions to our project. We appreciate the feedback we have received throughout ID2050 from both our professor and colleagues. Our project would not have been as successful without all the valuable insight we received.



# Table of Contents

|  |      |
|--|------|
| Abstract .....                               | ii   |
| Executive Summary .....                      | iii  |
| Acknowledgements .....                       | vii  |
| Table of Contents .....                      | viii |
| List of Figures .....                        | xi   |
| Authorship.....                              | xiii |
| 1 Introduction .....                         | 1    |
| 2 Background.....                            | 2    |
| 2.1 Cycling Without Age .....                | 2    |
| 2.1.1 Organization Mission and Purpose ..... | 2    |
| 2.1.2 Nonprofit Culture.....                 | 3    |
| 2.2 Finding The Balance .....                | 3    |
| 2.2.1 Developing an IT Strategy .....        | 4    |
| 2.2.2 Structure and Process.....             | 4    |
| 2.2.3 Strategy For NGO's .....               | 5    |
| 2.3 CWA's Current IT Landscape.....          | 6    |
| 2.3.1 The IT Challenge .....                 | 6    |
| 2.3.2 Platforms Used.....                    | 6    |
| 2.3.2.1 WordPress.....                       | 7    |
| 2.3.2.2 The Hood .....                       | 7    |
| 2.3.2.3 Podio.....                           | 7    |
| 2.3.2.4 Other Platforms.....                 | 8    |
| 2.3.3 Strengths and Weaknesses .....         | 8    |
| 3 Methodology.....                           | 9    |
| 3.1 Identifying Current Systems.....         | 9    |
| 3.2 Analyzing The Data .....                 | 10   |
| 3.3 Developing an IT Landscape.....          | 10   |
| 4 Results of Surveys and Interviews.....     | 11   |
| 4.1 Interviews With CWA Leaders .....        | 11   |
| 4.1.1 Interview With Ole .....               | 11   |

|       |  |    |
|-------|--|----|
| 4.1.2 | Interview With Pernille.....                       | 12 |
| 4.1.3 | Interview With Christian.....                      | 12 |
| 4.2   | Surveys.....                                       | 13 |
| 4.2.1 | Partners .....                                     | 13 |
| 4.2.2 | Affiliates .....                                   | 14 |
| 4.3   | Follow Up Interviews.....                          | 15 |
| 4.3.1 | Partners .....                                     | 16 |
| 4.3.2 | Affiliates .....                                   | 17 |
| 5     | Analysis of IT Platforms.....                      | 18 |
| 5.1   | Book2Go Feedback .....                             | 18 |
| 5.2   | Customer Relationship Management (CRM).....        | 19 |
| 5.3   | WordPress Templates and Permission .....           | 19 |
| 5.3.1 | Templates .....                                    | 20 |
| 5.3.2 | Editing Permissions and Alternative Solutions..... | 20 |
| 6     | IT Strategy Options .....                          | 21 |
| 6.1   | Option 1: Integration Dashboard.....               | 21 |
| 6.2   | Option 2: Alternative to Dashboard .....           | 22 |
| 6.2.1 | The Hood and Donation Platform Integration .....   | 23 |
| 6.2.2 | Book2Go Integration .....                          | 23 |
| 6.3   | Additional Recommendations .....                   | 23 |
| 6.3.1 | The Hood .....                                     | 23 |
| 6.3.2 | Book2Go.....                                       | 24 |
| 6.3.3 | CRM.....   | 24 |
| 6.3.4 | Google Workspace.....                              | 25 |
| 6.4   | Priority and Cost.....                             | 26 |
| 7     | Follow Up and Recommendations .....                | 28 |
| 7.1   | Volunteers .....                                   | 28 |
| 7.2   | Future Projects.....                               | 28 |
|       | References.....                                    | 30 |
|       | Appendices.....                                    | 32 |
|       | Appendix A: Interview Questions.....               | 32 |
|       | A.1 Ole Questions.....                             | 32 |
|       | A.2 Pernille Questions .....                       | 32 |
|       | A.3 Christian Questions.....                       | 33 |

Appendix B: Survey Questions ..... 34  
    B.1 Partner ..... 34  
    B.2 Affiliate ..... 35  
Appendix C: Survey Results ..... 36  
    C.1 Affiliate Responses to Questions ..... 37  
    C.2 Partner Responses to Questions ..... 44  
Appendix D: Follow Up Interview Results ..... 47  
    D.1 Partner Responses ..... 47  
    D.2 Affiliate Responses ..... 49  
Appendix E: Integration Dashboard Information ..... 54  
Appendix F: Integration Dashboard Package Breakdown ..... 56

## List of Figures

| Figure # | Description   | Page #     |
|----------|---|------------|
| 1        | Depiction of a Holacratic vs. Hierarchical Structure adapted from <i>Charterhouse SG</i>            | 3          |
| 2        | IT Technology Landscape Diagram adapted from <i>The Burnie Group</i>                                | 5          |
| 3        | Map of Chapters across the World adapted from <i>Cycling Without Age</i>                            | 9          |
| 4        | Partner WordPress Usage based on Survey Responses   | 14         |
| 5        | Affiliate WordPress Usage based on Survey Responses   | 15         |
| 6        | Different Affiliate Booking Platforms used based on Survey Results                                  | 15         |
| 7        | Integration Dashboard Example   | 21         |
| 8        | Features of Possible Dashboards   | 22         |
| 9        | Cost Analysis for Dashboard and CRM Recommendations   | 26         |
| 10       | Pie chart demonstrating affiliate use of WordPress  | 41         |
| 11       | Pie chart demonstrating what email software affiliates use  | 41         |
| 12       | Pie chart demonstrating what booking system affiliates use  | 41         |
| 13       | Bar graph demonstrating the count of trishaws for a given chapter                                   | 42         |
| 14       | Pie chart showing what is used for organization of chapters   | 42         |
| 15       | Pie chart showing what system is used for newsletters   | 42         |
| 16       | Pie chart showing what system is used for planning  | 43         |
| 17       | Pie chart demonstrating if a chapter does or does not have a trishaw                                | 43         |
| 18       | Pie chart demonstrating willingness to contribute money to the technology                           | 43         |
| 19       | Pie chart showing different packages to offer start ups   | 44         |
| 20       | Table listing different integration dashboards followed by the pros and cons of particular services | 54, 55, 56 |

|    |   |    |
|----|---|----|
| 21 | Table demonstrating the different packages and corresponding features for Zapier            | 57 |
| 22 | Table demonstrating the different packages and corresponding features for Kindful and Okta  | 58 |
| 23 | Table demonstrating the different packages and corresponding features for NeonCRM           | 59 |
| 24 | Table demonstrating the different packages and corresponding features for Make (Integromat) | 60 |

## Authorship

| <b>Section</b>  | <b>Author</b>  | <b>Editor</b>  |
|---|--|--|
| <b>Introduction</b>   | Codey Battista, Lily Lancellotti, Kristin Lavoie                           | Codey Battista, Lily Lancellotti, Kristin Lavoie   |
| <b>Background</b><br>2.1 Cycling Without Age<br>2.2 Finding the Balance<br>2.3 CWA Current IT Landscape   | Lily Lancellotti<br>Kristin Lavoie<br>Codey Battista                       | Codey Battista, Kristin Lavoie<br>Codey Battista, Lily Lancellotti<br>Lily Lancellotti, Kristin Lavoie     |
| <b>Methodology</b><br>3.1 Identifying Current Systems<br>3.2 Analyzing the Data<br>3.3 Developing a New IT Landscape                            | Kristin Lavoie<br><br>Codey Battista<br>Lily Lancellotti                   | Codey Battista, Lily Lancellotti<br><br>Lily Lancellotti, Kristin Lavoie<br>Codey Battista, Kristin Lavoie |
| <b>Results of Surveys and Interviews</b><br>4.1 Interviews with CWA Leaders<br>4.2 Surveys<br>4.3 Follow Up Interviews                          | Kristin Lavoie<br><br>Codey Battista, Lily Lancellotti<br>Lily Lancellotti | Lily Lancellotti, Codey Battista<br><br>Kristin Lavoie<br>Kristin Lavoie, Codey Battista                   |
| <b>Analysis of IT Platforms</b><br>5.1 Book2Go Feedback<br>5.2 Customer Relationship Management (CRM)<br>5.3 WordPress Templates and Permission | Kristin Lavoie<br>Kristin Lavoie<br><br>Lily Lancellotti                   | Codey Battista, Lily Lancellotti<br>Codey Battista, Lily Lancellotti<br><br>Codey Battista, Kristin Lavoie |
| <b>IT Strategy Options</b><br>6.1 Option 1: Integration Dashboard<br>6.2 Option 2: Alternative to Dashboard                                     | Lily Lancellotti<br><br>Lily Lancellotti, Codey Battista                   | Codey Battista, Kristin Lavoie<br><br>Kristin Lavoie   |

|                                      |  |  |
|--------------------------------------|--|--|
| 6.3 Additional Recommendations       | Kristin Lavoie                                   | Codey Battista, Lily Lancellotti                 |
| 6.4 Priority and Cost                | Kristin Lavoie, Lily Lancellotti                 | Codey Battista                                   |
| <b>Follow Up and Recommendations</b> |  |  |
| 7.1 Volunteers                       | Kristin Lavoie                                   | Codey Battista, Lily Lancellotti                 |
| 7.2 Future Projects                  | Kristin Lavoie                                   | Codey Battista, Lily Lancellotti                 |
| <b>Appendices</b>                    | Kristin Lavoie, Lily Lancellotti, Codey Battista | Kristin Lavoie, Lily Lancellotti, Codey Battista |



# 1 INTRODUCTION

As nonprofit organizations grow and develop, they must consistently evaluate technological needs. **Growth is important in an organization's development, but it can lead to a disorganized and scattered IT landscape inhibiting further expansion.** Expansion allows for an organization's mission to impact more people, and without a strong IT strategy, this goal is difficult. This is a problem faced by many organizations, including Cycling Without Age.

Cycling Without Age (CWA) is a nonprofit organization that was founded by Ole Kassow in Copenhagen, Denmark, in 2012. The organization has grown from a single chapter to reach over 50 countries, with approximately 2,700 individual chapters across the globe. **Cycling Without Age aims to improve the quality of life amongst senior citizens by offering them bike rides and giving them the opportunity to feel the wind in their hair and share stories with volunteers.** As people age, they cannot indulge in this simple pleasure and CWA aims to bridge this gap. The five guiding principles that CWA follows include generosity, slowness, storytelling, relationships, and without age, each of which helps the organization to create a world of togetherness. This movement improves both mental and physical health of the elderly across the world, breaking down limitations that are created by age. Our project will allow CWA to continue to grow by allowing the sense of togetherness also to exist within their IT system.

As an organization grows, evaluating the features of an IT landscape to create the most effective strategy is critical. Research has shown that each of the various components of an IT landscape must be successful in order to create a prosperous strategy that benefits the work of volunteers. **For CWA, two possible facets of their IT that our team researched include a content management system (CMS) and a customer relation management (CRM) system.** Currently, WordPress is being used as their CMS, but they do not have a designated CRM, and are using Podio to satisfy those needs, resulting in a fragmented organization. **CWA aims to introduce integrations within these IT systems to aid in the organization's overall growth.** In addition to our own ideas, past IQP research has given us many areas to improve upon through our project. This information, an understanding of how an IT strategy works, and knowledge of decisions CWA has already made, guided us to provide CWA with the best recommendations.

As CWA grows, they have found that **their current IT strategy and landscape is not appropriate to effectively fulfill all their needs,** especially since there is a lot of variety in technological choices amongst individual chapters. As a team, we analyzed CWA's current IT strategy and landscape to identify the needs they have, and determine which platforms are more useful and effective for the nonprofit, to **suggest a new IT strategy better suited for their continued growth while prioritizing their holacracy and budget.** This report outlines the needs of an organization for a strong IT strategy, followed by the methods used to gather data, including surveys and interviews with CWA international and individual chapters, and concludes with gathered results and the team's final recommendation

## 2 BACKGROUND

This section provides an **overview of Cycling Without Age (CWA), the features of an IT strategy, and the special challenges of an IT strategy for nonprofit organizations.**

Finally, we review CWA's current IT strategy and CWA's goals for the future.

### 2.1 CYCLING WITHOUT AGE

Cycling Without Age (CWA) is a nonprofit organization that aims to create a sense of togetherness within communities through the dissolution of the generational gap and lessen the sense of loneliness often common amongst seniors. The recognized impact of this organization has resulted in the expansion of CWA to reach 52 different countries, containing approximately 2,700 chapters around the world. While this growth is extraordinary, it has created some technological difficulties. This section will outline the organization itself, including its mission, goals, culture, history and growth, in order to determine how to best support CWA's IT needs.

#### 2.1.1 ORGANIZATION MISSION AND PURPOSE

As individuals age, they begin to see their best days fall behind them. This not only results in loneliness but may also cause health risks within the elderly. "Research has linked social isolation and loneliness to higher risks for a variety of physical and mental conditions: high blood pressure, heart disease, obesity, a weakened immune system, anxiety, depression, cognitive decline, Alzheimer's disease, and even death," (U.S. Department of Health and Human Services, 2019). Alternatively, elderly individuals who regularly engage in social activities and participate in exercise report a better quality of life which creates the need for CWA's mission.

**Cycling Without Age's mission is to bridge this gap between generations and quality of life, encouraging seniors to remain involved and active within their communities.** The organization's dream is to "create a world together, in which the access to active citizenship creates happiness among our fellow elderly citizens by providing them with an opportunity to remain an active part of society and the local community," (Cycling Without Age, 2022). Cycling Without Age follows five guiding principles which create the backbone of their organization. These include generosity, slowness, storytelling, relationships, and without age.

This organization has become vital across the country, improving the health of elderly individuals everywhere. One article published in a journal for Gerontology and Geriatric Medicine assessed the effect that Cycling Without Age has on participating seniors. The results showed the reported happiness by individuals at the start and end of the day on both days where they were given a trishaw ride and days when they were not. The results obtained revealed that **individuals started their days happier when they knew they would be receiving a bicycle ride that day and the happiness score grew throughout the day** due to their ability to participate in an active outdoor event held in their own community. Alternatively, on days where

they did not go on a trishaw ride, their happiness score remained stagnant at below 50.00 (Gray & Gow, 2020).

## 2.1.2 NONPROFIT CULTURE

The freedom that **Cycling Without Age** gives participants within their organization is referred to as a **holacracy**, which is a system that allows all participants to participate in an organization’s growth and success via decentralized teams and management. Farkhondeh and Müller report that “the concept of Holacracy aims to remedy the dysfunctionalities of the bureaucratic approach and make use of principles like self-organization and shared decision-making authority through decentralized authority” (2021). Many organizations have shifted to this holacratic structure due to problems that have arisen from the hierarchical structure of most organizations, including leaving big issues unresolved, slowing work progress and overburdening managers, lacking a sense of clarity and goals, and needing to adapt to a rapidly changing world (CompassPoint, 2016). In terms of centralizing their IT system, CWA aims to maintain their holacratic system and still allow a decent amount of creative freedom amongst participants.

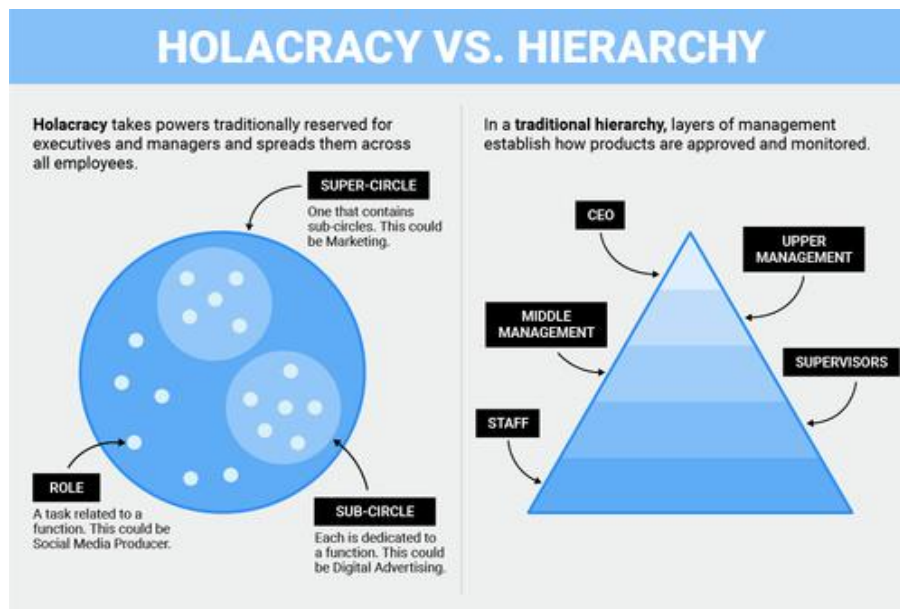


Figure 1: Depiction of a Holacratic vs. Hierarchical Structure adapted from *Charterhouse SG*

## 2.2 FINDING THE BALANCE

Since CWA’s holacratic system is highly successful, a challenge for the IT strategy is centralizing IT systems and platform integrations while maintaining the individual autonomy of chapters. Therefore, the team used a variety of techniques to learn about CWA’s organization through surveys and interviews described in later sections of this report.

---

### 2.2.1 DEVELOPING AN IT STRATEGY

An IT strategy is a structural plan for a company or organization outlining the different systems and platforms they use to complete different tasks (Pratt, 2020). This allows them to ensure that every part of their technological system is being used efficiently and practically. **An IT strategy also requires re-evaluation of technology in order to consistently assess needs and how they are being fulfilled.** It is essential to get a baseline understanding of the current landscape, so it is clear what to build an IT Strategy from (Heffernan, 2023). Different requirements must be satisfied based on an organization's goals and needs. Without an effective IT strategy, there can be many disconnections between the different IT systems, which is seen in the CWA organization that uses several systems rather than one clear and concise strategy.

---

### 2.2.2 STRUCTURE AND PROCESS

The structure of an IT strategy and the aspects that make up an organization's plan is not a singular specified set of rules but must be adapted and edited for the needed scope. Information about drafting a general IT strategy below was synthesized from articles by the Burnie Group and TechTarget CIO.

Prior to delving into goals and where an organization should go with a strategy, it is important to **create an IT baseline of the current technology landscape and needs** (Heffernan, 2021). This baseline allows the planner to get an understanding of what platforms are being used currently, alongside their purpose and cost. From here, one can do a SWOT analysis (strengths, weaknesses, opportunities, threats), to see which of the current systems are working well, and where there may be gaps in the current methods. Following this general overview is a review of finances, looking at different aspects individually and grouped by the breakdown described above (Heffernan, 2021). Here, it becomes clear where priority lies and budgets are allocated, revealing inefficiencies. Next, assessing the issues regarding technology and business separately, as well as the overall risks with compatibility and security is important. *Figure 2* shows an example of a breakdown of this analysis from the Burnie Group:

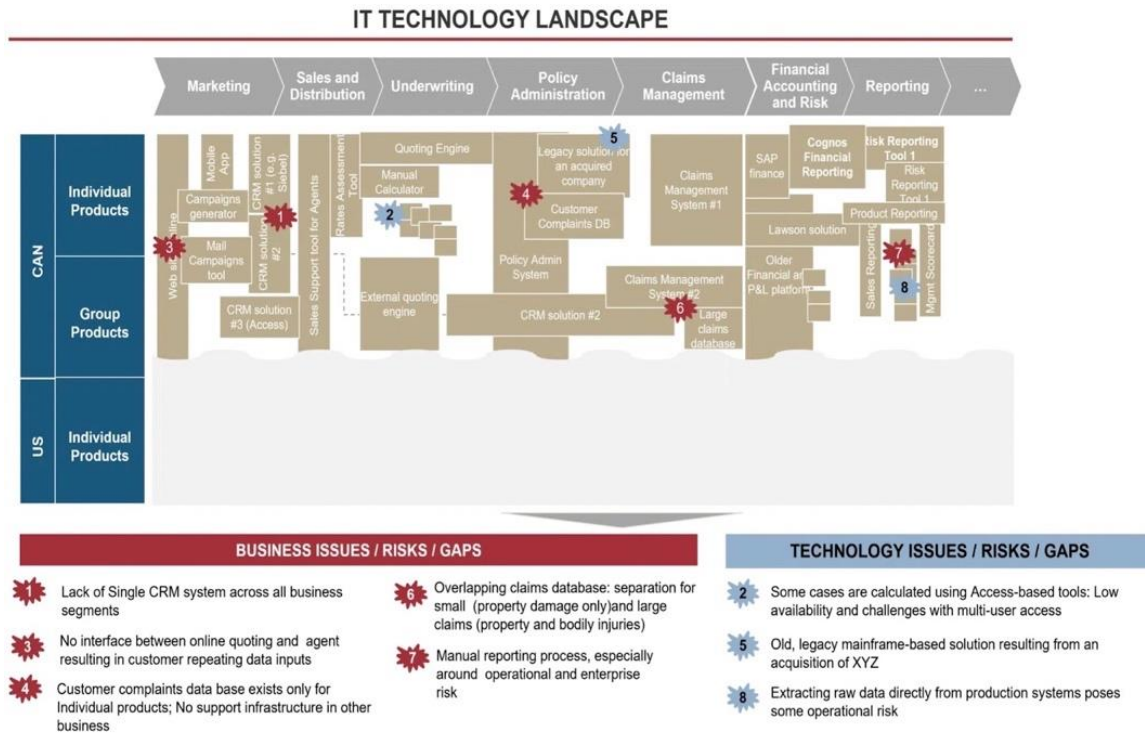


Figure 2: IT Technology Landscape Diagram adapted from *The Burnie Group*

After reviewing the input for the IT strategy, it becomes time to start planning and developing the actual strategy for the outcome (Heffernan, 2021). Here, it is important to approach the strategy as a plan over time, so that it isn't changing too much all at once, and any data transfer goes smoothly. It is also essential to note that re-evaluation of the strategy and a level of flexibility is necessary, alongside multiple parties' collaboration and longevity of technology.

### 2.2.3 STRATEGY FOR NGO'S

**IT strategies for nonprofit organizations like CWA may differ from strategies used by for-profit organizations.** As previously mentioned, an effective IT strategy is key to encouraging organizational growth and furthering their mission, yet different sizes and types of organizations have different needs from one another.

As a group, nonprofit organizations pursue a mission in order to help people satisfy some need and NGOs often have fewer financial resources for IT strategies. An article from Forbes outlines some of the different challenges nonprofit organizations are facing, outside of budgeting constraints. One such challenge concerned communication and integration across different communities. **Global nonprofits face further obstacles surrounding organizational operations, meeting across time zones, or interacting with language barriers** (Forbes, 2022). Such considerations introduce many questions and potential problems regarding technology

platforms and systems, including the costs associated with crossing borders, or availability of a platform in different areas.

Additionally, nonprofit and for-profit organizations have different focuses. For-profit organizations are primarily focused on the consumer or customer which can result in very targeted and focused IT strategies. Nonprofits have a lot more stakeholders or interested parties. With so many constituencies to satisfy, the needs of each group and integrating effectively across platforms is key. The cost efficiency of implementing the different platforms and being proactive with cybersecurity and data security are also vital (Hammerstrom, 2019).

Finally, IT strategies require a different approach for nonprofit organizations. When a for-profit company comes up with or revises their IT strategy, it is often to reduce costs, make more money, or satisfy a key need determined by their business strategy. As a corporation or enterprise grows, having data stored and easily accessible is key to keeping a company running (Borremans, 2018). Alternatively, when a nonprofit makes IT decisions it is oftentimes in response to a problem or development that may require changes to continue running at all. Typically, the mindset of doing things reactively, as opposed to proactively, prevents nonprofits from having a stronger IT landscape (Bunch, 2018). With an executive leader frequently filling an IT role, they cannot actively develop and maintain the technology of an organization as they are simultaneously focused on running that organization.

## 2.3 CWA'S CURRENT IT LANDSCAPE

As CWA continues to expand and further their mission, **the exponential growth in recent years has become a burden on the current IT landscape**. Within the CWA chapters and community, the need for a new strategy is becoming critical due to rapid growth. The most **common platforms used include WordPress, The Hood, Podio, and Book2Go**. Each of these platforms possess their own strengths and weaknesses, creating potential for integration and individual growth.

---

### 2.3.1 THE IT CHALLENGE

Currently, the platforms being used are extremely scattered and disconnected. Due to the holacratic structure of CWA, local chapters choose their own systems to use. A local chapter in Portugal has exemplified this way of thinking by creating a beautiful website that thrives in their region but is somewhat disconnected from the community. CWA wants their image to be consistent, which is difficult when multiple CWA sites come up when searched for on Google.

---

### 2.3.2 PLATFORMS USED

CWA's current IT landscape has a multitude of platforms that are being utilized for different reasons. Some satisfy a specific need while others satisfy multiple. For local chapters in



different areas of the world, some platforms are employed more commonly than others. In this section, there will be an overview of some of the more commonly used systems within CWA.

---

### 2.3.2.1 WORDPRESS

Throughout CWA, most chapters have used **WordPress** at one time or another. It is the **most common Content Management System (CMS)**, a place that facilitates the creation and publication of any digital content like websites, blogs, forums, online stores, etc (Cabot, 2018). The purpose of this platform is to make publishing content easy, even for somebody with no technical skills. Additionally, while it is simplified for the beginner user, it also permits the user to achieve high scale products that involve complexity during production. The versatile nature of WordPress is the reason for its popularity, as it aims to be a “one size fits all” solution instead of only for specific customer profiles (Cabot 2018). In addition to the elaborate setup of the platform, it also contains items known as “plugins” that can be purchased to add more functionality to the content that is being created (Cabot, 2018).

---

### 2.3.2.2 THE HOOD

In addition to WordPress, **The Hood is a discourse web forum that implements an online community allowing the user to share information** (Cycling Without Age, 2019). As a result of this platform becoming more popular within CWA, it has become a new place for collaboration. Here, individuals can pool their resources and find information (Cycling Without Age, 2019). Ideally, information on various topics relating to the NGO and its mission like bikes, liability/insurance, fundraising, etc., can be added and accessed with ease. This platform works best and can be most productive when everybody uses it and adds their knowledge to create a growing list of questions and ideas that could help the organization in the future. In order for the system to be most efficient, the site should use “moderators,” to make sure it runs smoothly. They have tasks such as ensuring the proper usage and maintaining site organization including keeping the site productive and appropriate, while also managing access to information (Cycling Without Age, 2019).

---

### 2.3.2.3 PODIO

Another site used in CWA’s landscape is **Podio, containing information about partners of CWA, as a CRM and for form creation**. Podio’s flexibility and great features come together to make superb collaboration experiences for organizations and their employees (“What Is Podio - And How to Better Structure Your Business,” 2019). To do this, the platform administers workspaces and utilizes applications. Workspaces are where participation transpires. They bring people together and provide them with apps that are relevant to the project and the organization. The applications that are available can be custom made by the user or taken from the store of premade apps.



---

#### 2.3.2.4 OTHER PLATFORMS

Some examples of other systems used by CWA include Book2Go and Google Workspace. **Book2Go is the current booking system that CWA developed themselves** and is currently spreading around the world. However, even though CWA created Book2Go, some chapters use external booking systems instead. Additionally, Google Workspace and all its tools including Docs, Sheets, Forms, Calendar, and many more are utilized within the organization.

---

#### 2.3.3 STRENGTHS AND WEAKNESSES

Since CWA's current landscape consists of a multitude of different platforms, integration is a strong solution to achieving productivity within the organization. The integration of technology can improve the ability of the worker by removing repetitive aspects of complex tasks or improving system communication. (*Technology in Schools*, n.d.). Certain practices that could be integrated within different platforms include collaborative work and communication, Internet-based research, remote access to instrumentation, network-based transmission and retrieval of data, and other methods (*Technology in Schools*, n.d.). In terms of satisfaction of needs, communication is a critical step because it can keep chapters from making the same mistakes. Strengths of the overall landscape can help with cost, efficiency, and growth, while weaknesses can cause disorganization, and take away from the ultimate mission that CWA is trying to fulfill.

### 3 METHODOLOGY

The **goal of this project** was to **analyze Cycling Without Age’s (CWA) current IT strategy and landscape** to identify the needs of the organization and determine which platforms are more useful and effective for the nonprofit, in order to **suggest a new strategy** better suited for their continued growth while prioritizing their values and resources.

**Our Objectives:**

1. To identify CWA needs and what systems were working well in their current IT landscape on an international and local level.
2. To determine if there were systems outside of their current landscape that may work better based on their needs.
3. To develop an appropriate IT strategy based on their needs and budget constraints.

Geographically, our project included CWA chapters and partners around the world. Much of this work was completed throughout March and April of 2023, and we adhered to Denmark’s working guidelines.



*Figure 3: Map of Chapters across the World adapted from Cycling Without Age*

#### 3.1 IDENTIFYING CURRENT SYSTEMS

To identify CWA’s needs and what systems were working well required examination of their **current IT landscape and needs**. This landscape encompasses both the systems used and provided by CWA international as well as by individual chapters. We accessed this information through **interviews and surveys**.

We interviewed Ole Kassow, Pernille Bussone, and Christian Persson as they best know the overall IT landscape, alongside the needs of the organization. Ole is the founder of CWA, and thus has a unique and integral understanding of the organization's mission and needs. Pernille is one of the first people many new affiliates talk to regarding how they can start their own chapter and access the different IT systems. Christian, the primary IT person, has more knowledge about how the platforms work. The information from these individuals was used to understand CWA's baseline IT strategy. Important questions from these interviews are in Appendices A and B.

#### **Surveys were sent to partners of CWA, and their affiliates (the CWA chapters).**

Partners in CWA correspond to countries running autonomously, with multiple chapters. Chapters, also known as affiliates, are often supervised by the corresponding partner. By asking chapters about their own IT, what works well and what does not, we began to define the gaps in IT strategy. These surveys were sent via email and responses were collected in Google Forms. We asked different questions of partners and affiliates to determine IT needs for different levels of the organization. One of the challenges we experienced was the language barrier. Since CWA is a global organization, not all of them speak or understand English. To try and combat these difficulties, we translated our partner and affiliate surveys into different languages when we sent them to chapters. We also made our survey in Google Forms to provide CWA with continued access to the responses after the conclusion of our project work. Questions that were important on these surveys are noted in *Appendix C*, and were transferred to a multiple choice, short answer format.

We understand such survey methods may have introduced an element of response bias. Some chapters did not respond or did not have a convenient email address to reach them from. Nevertheless, we knew this would be the most effective way to reach as many people as possible. This preliminary round of interviews and surveys were essential to understanding the scope of the problem, and what our solution must satisfy.

## **3.2 ANALYZING THE DATA**

After receiving survey responses from local chapters, the results were analyzed as described in the results chapter. **Different trends and patterns were identified to develop an effective IT landscape.** While data collection was essential, our goal was to reduce response bias as much as possible. As we analyzed the survey response data, follow up interviews were conducted. The last question of the original survey asked if the person was willing to do a follow up interview to discuss their IT strategy. As we analyzed the trends and patterns in the surveys, we decided which chapters we would like to conduct interviews with, in order to gather additional information about CWA's IT landscape shown in *Appendix D*.

## **3.3 DEVELOPING AN IT LANDSCAPE**

After analyzing the survey results and interviews that our team conducted, our goal was to provide a clear understanding of CWA's IT needs, in order to develop the best solution to their IT problem. To do so, **we reviewed the best working platforms that CWA is currently using against alternatives that may work more efficiently and fit within the NGO's budget.** A cost analysis was also necessary to ensure our final project fit within the scope of CWA's budget and funding. After performing these tasks, we were able to determine the best landscape for CWA's IT needs and establish integrations within the systems.

## 4 RESULTS OF SURVEYS AND INTERVIEWS

In order to begin understanding the CWA IT landscape we held interviews with pertinent leaders in the company, surveyed their partners and affiliates, and followed up with additional interviews with willing chapters that we thought could provide additional value to our project.

### 4.1 INTERVIEWS WITH CWA LEADERS

Prior to sending out surveys to and conducting interviews with CWA partners and affiliates, **we interviewed our three sponsors, Ole, Pernille and Christian,** to better understand their goals for our project. This helped us formulate our questions for the surveys and direct them in a way which aligned with their desired outcome. Each of these interviews provided a unique perspective, putting emphasis on various aspects of the project. Each section below outlines the insight we received from each of the three sponsors.

---

#### 4.1.1 INTERVIEW WITH OLE

Since Ole and Pernille work so closely together and budgeting their time separately was difficult, we decided to carry out their interviews together. Although, we still directed specific questions at each of them individually based on our desired understanding. Since Ole is the founder of CWA, he is the most familiar with the history and budget of the organization. Through his interview, we were able to gain an understanding of the history of CWA in terms of their IT system and the biggest challenges they continuously face. The questions that were asked during this interview are outlined in *Appendix A.1*.

Ole expressed to us during our interview that his main goals for our project are **functionality and consolidation.** While cost is a factor, the organization is generally satisfied with the amount they are paying for their IT systems. However, Ole believes that for the extent of the prices they pay, they would like their IT to work the way it was proposed when they signed the form, in the most efficient way possible. Regarding the value of their IT, WordPress and Book2Go were the primary platforms whose performance was discussed. WordPress is the current platform for CWA's international website. Ole believes **WordPress is a safe option since it is readily accessible, simple for users, and already used by many CWA participants,** but he does not like that the online **CWA presence is fragmented.** He would prefer one

cohesive website to display CWA that will allow users to navigate from there to individual partners and affiliates. He is open to finding a new platform but stated that it must be robust and contain a service agreement. In regard to Book2Go, his main goal includes the continued development of the platform and connecting it to other services such as The Hood, the map displaying the chapters, and a CRM.

Since Ole discussed the fragmentation amongst their IT system, we began to discuss the **creation of an integration dashboard**. This would be a way to integrate all the necessary apps used within CWA and connect them under a singular login. This would also eliminate the confusion of getting to each system and receiving help with each system, with the use of a help button.

---

#### 4.1.2 INTERVIEW WITH PERNILLE

Our discussion with Pernille further emphasized that the addition of a dashboard would be advantageous to the CWA landscape. Questions we asked Pernille are outlined in *Appendix A.2*.

The two key takeaways from our interview with Pernille include the need for integration and a CRM. Pernille stated that the dream would be to have a simple way for a user to get into every application they need (WordPress, Book2Go, Podio, etc.) under a **singular sign on (SSO) login**. This conversation led to the desire for a dashboard where a user could have all their necessary applications, see prevalent CWA news, start conversations with other users, and receive assistance with different platforms all in the same place. Ultimately, Pernille's prioritized goal for the CWA IT landscape is for it to become more organized with the use of this dashboard, and a CRM. Currently, CWA International uses Podio to satisfy their CRM needs, yet it is not consistently used throughout the organization. Pernille hopes that all chapters will use Podio such that it is uniform throughout all of CWA and thus the organization of pilots and riders will be much easier. We then asked her if she thinks a CRM that could integrate into the booking site could be helpful, which received a very positive response. Since Book2Go has much more information related to the pilots and riders, a CRM or database that is integrated there would be able to easily keep track of all the personal information of each user.

---

#### 4.1.3 INTERVIEW WITH CHRISTIAN

Since Christian has the most hands-on experience with the CWA IT landscape, he is most familiar with the challenges on the backend of the system. The questions that our team asked Christian during our interview are outlined in *Appendix A.3*.

Christian, much like Pernille, also expressed a strong need for a CRM in the CWA IT landscape. He claimed that Podio does not integrate well with other platforms and is very unorganized. Therefore, he would prefer a CRM that is able to be integrated into Book2Go in order to clearly keep track of all passengers and riders. Book2Go is Christian's biggest project now. He expressed that it has the potential to be a great platform but hasn't been developed to its

fullest extent yet. Ultimately, he would like feedback from partners and chapters around the world that will help him to develop Book2Go with the needs of the users in mind. Based on this interview, we were able to create interview and survey questions for chapters that allowed us to obtain prevalent feedback for Christian as he continues to develop Book2Go. This feedback is detailed further in *Section 5.1 Book2Go Feedback*.

## 4.2 SURVEYS

After receiving **survey responses from partner and affiliate chapters, there were many similarities** in chapters' opinions and responses, varying from the types of systems they were using to the problems they were encountering. In order to best discover patterns and trends in the data, our team conducted a content analysis using Google Sheets. Once the data was in Sheets, it was easily converted into graphs and charts providing clear visual representation.

Throughout the survey process, there were 15 total responses from the affiliate chapters. These responses ranged from 5 different countries including the United States, Canada, Netherlands, Australia, and France. In addition to the affiliate chapters, the partner chapters totaled 16 responses from 15 different countries throughout the globe. This allowed us to receive overarching feedback from a variety of corners within the organization. We also converted the information received in Sheets to a Google Document to help separate questions and readability.

---

### 4.2.1 PARTNERS

Regarding partner responses, there was a lot of variety in what information and problems about the systems were being shared. This differed from the affiliate responses where there was a common trend of hearing about WordPress and Book2Go.

As shown in the figure below, the **majority of the partners who responded use the shared WordPress platform** for their webpage. After looking at the responses coinciding with this usage, it became clear that the partners, who oversee a number of affiliates, have a stronger understanding of how to use WordPress than the affiliates do. This could be because there are more technologically inclined employees within these chapters, they have a more managerial role, or there is a designated IT person in charge of the technology. It is also beneficial to have a partner page on the shared WordPress website, because it provides the opportunity to promote the affiliates they oversee by sharing their country's goals and impact, as opposed to promoting rides.



Count of Do you use CWA's shared WordPress installation as your main website?

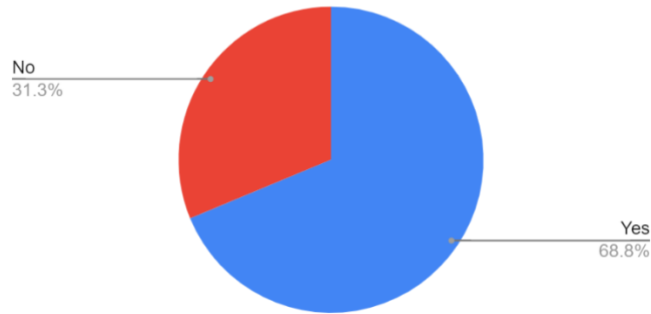


Figure 4: Partner WordPress Usage based on Survey Responses

Looking at partner needs, there are a variety of concerns including funding, more communication, and efficient, user-friendly systems. **Many believed that the integration between the website and booking system could be beneficial**, so overseeing affiliate chapters is easier. Despite the holacratic structure of the CWA organization internationally, the more hierarchical organization of partners and their affiliates allows for some level of structure within the IT. Oftentimes the struggles seen in the survey responses connect to the supervision of affiliates. Aiding pilots and riders to be more self-sufficient using a booking platform is a common theme that would make the organization run more smoothly.

In terms of priorities, partners have a number of different needs they can identify. Some of these include email, Zoom, Excel, and social media functionality in addition to the WordPress and booking systems described above.

---

#### 4.2.2 AFFILIATES

Many of the affiliate survey responses shared that they prioritized a website presence and a booking platform as a need. **Many affiliates expressed that having a web page connected to their own nonprofit organization is beneficial** to reach a broader audience. However, they **still want to be connected to the CWA brand** and have a way to **navigate from the CWA International page to learn more about their individual chapter**. Furthermore, regarding the booking system, many survey responses discussed confusion when using the platform and a general frustration with the inability for pilots and riders to create their own rides. Many followed up this feedback by stating that they would be willing to be interviewed and further discuss Book2Go, which is detailed further in *Section 5.1 Book2Go Feedback*.

In the survey, affiliates were asked whether they use WordPress as their main website platform and any feedback about this usage. **In contrast to the partner surveys, nearly two thirds of affiliates use their own webpage as opposed to the WordPress site** as demonstrated in the figure below. Many claimed that they preferred to use their own website for numerous reasons, including not wanting to learn a new website platform, and to reach a broader audience on another nonprofit's site.



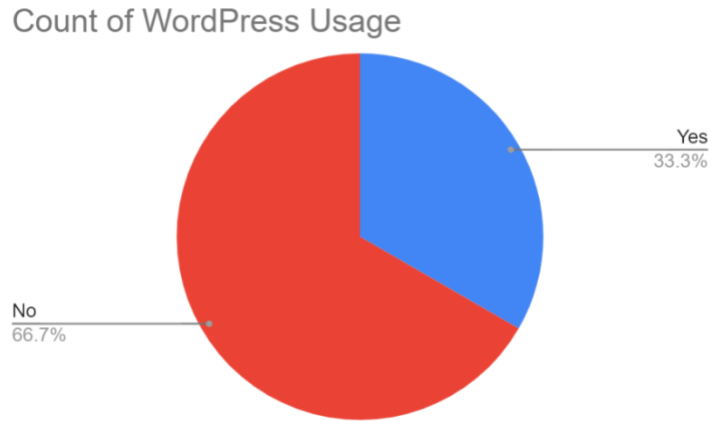


Figure 5: Affiliate WordPress Usage based on Survey Responses

In addition to WordPress, **Book2Go is a critical system that receives a lot of feedback.** A lot of the response data spoke on specific changes that could be future developments for the booking platform. While affiliates utilize various booking systems as shown in *Figure 6*, our team received a lot of feedback on Book2Go that would make chapters more inclined to utilize the CWA specific service.

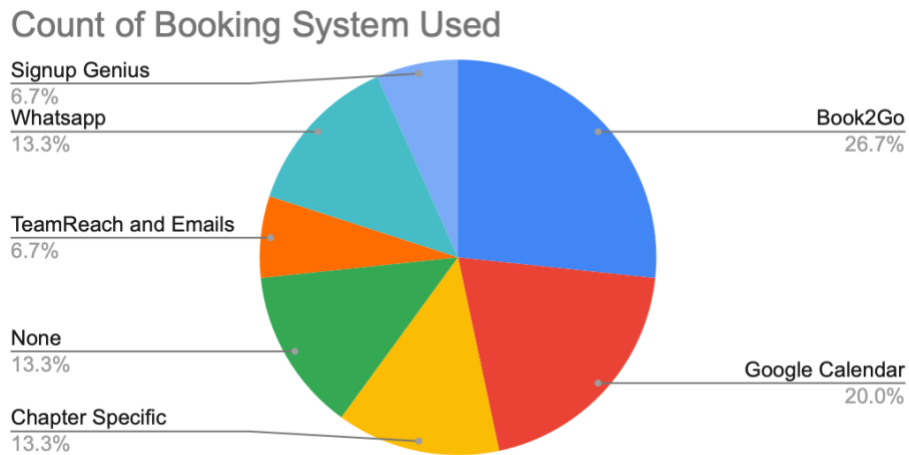


Figure 6: Different Affiliate Booking Platforms used based on Survey Results

Some common challenges included confusion with booking rides as well as problems with editing existing rides. Multiple respondents also mentioned the overload of emails due to the lack of developed features in Book2Go, as well as the need for riders and pilots to be able to book their own rides, and this feedback is further outlined in *Section 5.1*.

### 4.3 FOLLOW UP INTERVIEWS

Following the conclusion of our primary interviews and surveys we moved on to **further analysis of the data through follow-up interviews** to determine opportunities for improvement. These opportunities for the IT landscape will be outlined in this section, with plan options and recommendations on direction to follow in the next section.

---

#### 4.3.1 PARTNERS

We first talked to **partner A, who does not host their website on the shared WordPress platform**, in order to gain some understanding of how their page functions, and why they strayed away from the international page. They shared that the page was created prior to their personal involvement with the chapter, however they gave what information they had on it. The website was created by the founder of the first CWA in this country, who built it essentially from scratch and did a lot of work coding the back end based on the needs of the chapter. This person then spent a significant amount of time working with Ole to try and develop this website for the entire organization, but unfortunately stopped volunteering with CWA, and thus the site was never expanded. The country has continued to use their page though, as it is very efficient for their chapters, aesthetically pleasing for their viewers, and easy for pilots to book rides.

This chapter also employs extensive use of a **CRM platform called “Monday,”** and has reduced cost access to this service by identifying as a nonprofit organization. They claimed that this service was essential in running their chapters and believed that it could be useful to other chapters as well, which was important to us as we built our recommendations. This partner is **particularly happy with the way their IT landscape is functioning but shared that inhabiting some of their landscape could greatly benefit the organization.** This is particularly relevant to the CRM, as it has a nonprofit package and is a vital to their IT system. Regarding a booking system, the chapters in this country **do not use the CWA created Book2Go, but instead have their own system that they created using “WIKI,”** which is similar to Google Forms. It connects back to a spreadsheet where pilots can be matched with passengers. They are happy with the integration present between their different systems and use The Hood as an additional resource. When asked if there was anything more, they shared that they **wished for some sort of annual meet up or communication opportunity across all the chapters.**

The **other partner we spoke with, Partner B, does use WordPress as the main forum for their website**, and has been doing so for about 8 years. They claim that it works for them as a platform, however **when new chapters join the organization, they struggle to make a page** here. They find it confusing when getting a URL and oftentimes end up on an outside website because it's easier. Additionally, there are some grievances that were shared with us regarding shortcomings of the website, including the cost, GDPR compliance, and having access to data and statistics so they can learn more about the page's traffic. Overall, **this partner's needs include more privileges to use the site to its fullest potential** if they are paying more for a presence here than they would on an outside domain. This need can be **satisfied through the adoption of a CRM** to keep data organized and concise. They also would like some sort of **fundraising platform and IT support** in this regard, in order to help maintain the sustainability

of the organization. Through integration of the platforms as detailed in *Chapter 6*, these needs will be satisfied.

With regard to the booking platform, **partner B does not use Book2Go but instead created their own booking system** around the time that Book2Go was developed. It is specific to their country and has more detail to work better for their particular chapters. Another interesting system in their landscape was **Podio**, which is used very often by Pernille and Ole, and they **find value from this platform as a database hub**, recording information on people interested in joining, those that are currently volunteers, weekly reports, and more. They also shared that **more integration could be useful**, and they prefer to continue using the systems they currently have, but potentially with an additional plugin for increased functionality. They also shared that it was a **struggle for chapters to make it through the startup process**. They faced a lot of trouble with the technology aspect, and **difficulty using The Hood due to language barriers**, so some way of having them all set up when they're given the login would be useful.

---

#### 4.3.2 AFFILIATES

Regarding our interviews with affiliates, we were able to gain a lot of important feedback and thoughts about the different platforms they encounter. A lot of the information gained in these interviews was regarding the use of **Book2Go as a booking system. The main takeaway from this was that chapters like it as a platform**, and they think that it is along the lines of an application that is very useful for booking, however it is **lacking in regard to full functionality**. They struggle with some technical inefficiencies or gaps in the app that will be outlined in the following section regarding spaces for improvement.

Use of the **WordPress platform with the affiliates we interviewed was not common**, and the **majority preferred to use their own website** for information about the organization for a number of reasons. Some of these reasons included convenience of already working out of a previous nonprofit or club, which allowed the site to reach a broader audience, or an extensive knowledge of technology. Others had to do with confusion with the WordPress platform, feeling overwhelmed by how it was set up, and a lack of clarity in how to set up their own domain without affecting the entire system. They all shared that **their respective page held external links to reach the CWA international page, however the same could not be said about the reverse**. Some shared that if there were to be a **startup template to use on the WordPress site**, they may be more inclined to use it, and others maintained that their organization's page was better suited for broader outreach.

Another thing some of the chapters noted as a **potential concern was regarding fundraising endeavors as well as marketing and branding**. Many chapters noted that it would be great to have some advice or templates regarding different ways of advertising their chapter or learning how to fundraise and attract volunteers. They also shared that it would be beneficial to have some type of branding template.

## 5 ANALYSIS OF IT PLATFORMS

Following the conclusion of our interviews and surveys, we moved on to **further analysis of the data regarding ideas of possible changes** to be made and opportunities for improvement. These opportunities for the IT landscape will be outlined in this section, with plan options and recommendations on direction to follow in the next section.

### 5.1 BOOK2GO FEEDBACK

One of the biggest points of feedback and discussion in all the interviews and surveys surrounded Book2Go, or the need for an effective ride booking platform. Christian prompted us to gain as much feedback as possible to help further the development of Book2Go through our surveys and interviews. The service has a lot of potential but is only currently developed to utilize about 10% of these abilities.

**When trying to use Book2Go, affiliates and partners shared that it can be inconvenient trying to pair pilots and passengers after they go through the app.** Some noted that, at its current state, pilots are unable to book their own rides without approval from the coordinator. This is inconvenient and it would be beneficial if previously approved pilots are able to book rides on their own. There are also **complications with time zones and choosing a date** of the ride. Appointments are automatically pushed a day forward or backwards, and there is an inability to go in and edit a particular ride. This ultimately leads to a copious number of emails back and forth between coordinator, rider, and pilot, and wastes a lot of time. Another inconvenience with the present functionality, is that **it is not currently possible to book multiple rides at once**, and so if there is a repeat rider that you know will be back the same date/time every week, they must be booked individually each time. The ability for pilots and passengers to send messages directly to coordinate rides would allow for a smoother ride process, and a database connected to record dates and times of rides would help with data retention and analysis for the chapters.

Despite these difficulties, **people have shared that they are excited about the platform and look forward to its continued development.** Aside from the ride booking functionality, Book2Go is also being developed to have more information about different affiliates and chapters. This is a very positive and beneficial addition to the application, because it will allow riders and potential volunteers to explore what chapters are in their area, and then be able to access any external websites from there to get additional information. **Having more content on the Book2Go site will help centralize and unify the CWA community.** Another benefit from this would be having a map showing where these chapters are located. This **map would be populated by active chapters on the Book2Go service** (not necessarily from them using it to book, but having their name and location present), and thus would be automatically updated from the service as people start chapters. By using **the map in this location, CWA can help ensure**

**that the information is accurate and updated, as opposed to the current map on WordPress that must be updated manually and is not always correct.**

## 5.2 CUSTOMER RELATIONSHIP MANAGEMENT (CRM)

As was discussed earlier, CWA does not have a particular CRM that they use internationally or recommend on a chapter level, but currently uses Podio to satisfy some of the requirements of a CRM, among other things. Based on feedback from chapters and the different leaders of CWA, we've noticed that **having a more specific CRM could be beneficial in keeping track of information, or different tasks.** Many of the chapters described needing help regarding organization, or getting tasks done, and this is something that could be accomplished through having a CRM.

Looking at CWA international, having a CRM integrated with the Book2Go application could be used to keep track of the different chapters and their activity on the site. This would help when trying to reach out to chapters in a particular location as well as maintain accurate records regarding active or inactive chapters. Another solution for this outside of a CRM, would just be to have a database containing this information, which would be different from an organizational standpoint, however, may be better regarding simplicity of viewing and updating the data.

Another way **CRMs could be used would be individually by chapters, or by a partner giving access to the affiliates they oversee, in order to delegate and oversee tasks.** As we mentioned earlier, one of the partners we spoke with in an interview described their use of the CRM Monday. This allowed them to create tasks and delegate them to different volunteers, including assigning priority and checking progress over time. This includes a level of organization outside of the booking system and gives the chapters some autonomy in their organization maintaining the holacratic structure that is important to CWA. Furthermore, when done in a partner setting, this allows the chapter overseeing its affiliates to have some awareness of how the other chapters are doing, what they're working on or struggling with, and how they may need some assistance. From a **cost standpoint as well, allowing partners and affiliates to run a CRM on their own takes the monetary burden off CWA International,** and lets them provide a suggested CRM to use for chapters and partners sharing that it could help them, but it's up to them on whether or not to take the advice.

## 5.3 WORDPRESS TEMPLATES AND PERMISSION

As discussed previously, WordPress is the main platform used for CWA's website presence. Unfortunately, much like other parts of the CWA landscape, the **CWA webpages are fragmented.** When a user goes to look for CWA's online presence, they are presented with several different websites. **CWA would like to overcome this challenge by creating a more unified website that follows a logical progression from the international page to country**

**pages and then, finally, to the affiliate sites.** Detailed below are solutions our team has proposed to the CWA leaders and will add to our recommendations.

---

### 5.3.1 TEMPLATES

According to our survey results outlined in *Figure 5*, **66.7% of affiliate survey participants do not utilize the WordPress site provided for their website.** Through our interviews, we determined that this is partly due to WordPress being overwhelming and confusing to new users. An option that we have established based on this knowledge is providing a new chapter with a **template that they can use to fill in their important information rather than having to create a webpage from scratch.** This would come in the form of a **startup package** with detailed instructions on how to create their website and a general layout if they choose to use WordPress and follow the recommended template. **Many affiliates have expressed that if provided with this tool, they would feel far more inclined to use the provided WordPress site** rather than create their own website using an alternative platform. Not only would this make website creation easier, but it would also help the CWA community to appear more coherent to online viewers since each page would follow a similar theme.

---

### 5.3.2 EDITING PERMISSIONS AND ALTERNATIVE SOLUTIONS

Another challenge new users have faced regarding WordPress includes the ability to edit various content aside from their own page. **Many affiliates are fearful of creating a WordPress page since when they go to edit, they can edit every page within the CWA site.** This is daunting to many users who are scared to accidentally alter another chapter's page. If affiliates continue to choose to use the WordPress site, it is necessary that CWA alters editing restrictions to allow affiliates to only be able to edit their own content.

In order to avoid these restrictions altogether, our alternative option is to move affiliates away from using WordPress and **only allow country partners to have a page linked directly on the international site.** This is something we recommend regardless of whether the partner specifically chooses to use that page as their presence, because it will help unify the community, and allow people to access and see all the branches of the organization in one section. If a partner prefers a web presence in a different location, having a WordPress page that links to this location allows for both the community presence, and the country's freedom to develop their own site. These country partner pages would then have a directory of all the affiliates they oversee so users can access affiliates' Book2Go pages and alternative contact information. This option is detailed further in *Section 6.2.2 WordPress and Book2Go.*



## 6 IT STRATEGY OPTIONS

Following our analysis of the data gathered through interviews and surveys, we were able to begin formulating recommendations for CWA based on what systems they need as an organization, and the best ways to transition between them with the current IT landscape. **We have developed two suggested outcomes or directions of an IT strategy**, with a few common features between the two. The key difference between them is a more advanced level of integration when using a dashboard and SSO for users. These two unique parts of the strategy will be outlined first, and then followed by sections outlining the rest of the recommendations.

### 6.1 OPTION 1: INTEGRATION DASHBOARD

After discussing with the leaders of CWA, we established that one of their biggest goals is **integrating platforms**, specifically WordPress, Book2Go, and The Hood, to make their IT landscape easily manageable and navigable. **The most convenient way to solve this challenge is to create an integration dashboard containing all the necessary applications for each user.** This would look very similar to *The Hub*, which is used by students at Worcester Polytechnic Institute. We presented Ole, Pernille, and Christian with a look into how *The Hub* works for students with a “**Single Sign On**” (SSO). This received an overwhelmingly positive response from them, expressing that they are looking for something very similar. The key features of this platform that would benefit them greatly include a singular login for all users under an organizational email, access to current CWA news articles, a home dashboard with optional applications, and a request help button. The figure below displays a possible design mockup for the home dashboard page.



Figure 7: Integration Dashboard Example

Several platforms provide services to create an integrated dashboard. Our team created a list of five of these platforms along with important features and cost details for each of them. This is displayed in *Figure 8*, with a more detailed outline of these platforms in *Appendices E & F*.

| Platform                          | SSO Feature                         | Applications/Integrations Available | Easy International Use              | CRM Functionality                   | User-Friendly (1 least, 5 most) | Affordability (1 least, 5 most) | Management and Restriction Features (1 least features, 5 most) | Customization (1 least - 5 most) | Data Privacy Features  |
|-----------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|---------------------------------|---------------------------------|--|----------------------------------|--|
| <a href="#">Zapier</a>            | <input checked="" type="checkbox"/> | 2000+                               | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | 5                               | 1                               | 5  | 3                                | Advanced admin permissions, intense data security  |
| <a href="#">Make_(Integromat)</a> | <input checked="" type="checkbox"/> | 1500                                | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | 4                               | 5                               | 3  | 5                                | Maintains GDPR compliance, advanced security measures, authentication features   |
| <a href="#">NeonCRM</a>           | <input checked="" type="checkbox"/> | 1000+ when connected with Zapier    | Limited Functionality               | <input checked="" type="checkbox"/> | 3                               | 3                               | 2  | 4                                | NeonCRM Data Privacy and Consent feature, Two-Step Verification, Maintains GDPR Compliance                             |
| <a href="#">Kindful</a>           | <input checked="" type="checkbox"/> | 40+                                 | Limited Functionality               | <input checked="" type="checkbox"/> | 4                               | 2                               | 4  | 2                                | PCI SAQ-A compliant, processes to help with GDPR compliance, server redundancy and continuous data backups, encryption |
| <a href="#">Okta</a>              | <input checked="" type="checkbox"/> | 6,500+                              | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | 3                               | Somewhat                        | 5  | 1                                | Industry-standard administrative, technical, and physical safeguards, APEC Privacy Recognition, GDPR compliant         |

*Figure 8: Features of Possible Dashboards*

## 6.2 OPTION 2: ALTERNATIVE TO DASHBOARD

Instead of a dashboard with various platforms to choose from, **a second alternative includes the direct integration of The Hood, WordPress, and Book2Go**. This is a more cost-effective solution than the first option since it does not involve the additional monthly cost of implementing and using a dashboard. Regarding the integration of these platforms, **external links on the WordPress site could take you to The Hood as well as Book2Go**. In order to primarily use the three platforms, further development of each system is necessary, so this option is not without additional programming costs. The growth of each of these systems will help create an easy to use and efficient IT landscape that all partner and affiliate chapters can utilize to their advantage.

Another aspect of integration includes **the interactive map** as discussed in *Section 5.1 Book2Go Feedback*. **This map will include links to affiliate external sites if they have them**. This will be much more structured than what the map consists of now, a combination of some random personal emails of different site coordinators along with some CWA Google emails. Having the interactive map on Book2Go will create more consistency within the system and can be easily integrated into WordPress too. Lastly, **while these three platforms can be integrated, The Hood needs to be looked at in terms of its structure which will be explained** in the following section, *6.3.1 The Hood*.



---

## 6.2.1 THE HOOD AND DONATION PLATFORM INTEGRATION

**The dashboard will be an integral component of the CWA IT landscape.** However, platforms such as this can be exceptionally costly. If the cost is too unreasonable for CWA's budget, an **alternative option** would be the **integration of The Hood and a donation platform** directly connected to the WordPress site. **The Hood is a great resource for volunteers to gain relevant information about various organizational topics.** Currently, though, the only way to gain access to The Hood is through a signup link that expires shortly after the welcome email is received by new chapters. If The Hood were integrated into the WordPress site, volunteers would be able to access this information without needing a separate account in both platforms. Users would be able to navigate directly from their WordPress site to The Hood to gain relevant insight. **Many chapters have also expressed that they would appreciate assistance with fundraising.** In order to address this need, **a donation link would also be beneficial** if provided directly on the international site that affiliates can set up an account for and gain access to. Having these things directly on the WordPress site will ultimately negate a lot of current confusion regarding fragmented platforms.

---

## 6.2.2 BOOK2GO INTEGRATION

Additionally, **it is critical that WordPress and Book2Go are integrated** such that website viewers can navigate to affiliate's Book2Go pages from the WordPress website. Ideally, since CWA is holacratic, affiliates should be able to create their own website apart from CWA International while country partners should have a page connected to the international site.

**Because many affiliates are a part of a separate charitable organization, it is easier for many of these chapters to reach a broader audience by having a web presence connected to their own organization.** Therefore, while these affiliates can operate separately from the international websites, each country would have their own web page within the international WordPress site allowing users to find affiliates.

This can be done by having **a section on the country partner's page dedicated to locating contact information and the Book2Go page for each affiliate.** By doing this, the site will become far more organized, Book2Go will become more accessible, and affiliates will have the freedom to create their own webpages while staying connected to the international organization.

---

## 6.3 ADDITIONAL RECOMMENDATIONS

Following these two potential directions, there are some recommendations and improvements that we believe CWA should enact regardless of which option they choose.

---

### 6.3.1 THE HOOD

Looking first at **The Hood, making improvements to this platform could dramatically help new affiliates with questions during the startup process.** To make accessing information easier, there could be different categories for differing types of information. Rather than having category tags, **this improvement should be in the form of a clear and concise menu.** Such categories include questions about starting up, ways to fundraise or to make fundraising easier, marketing and advertising advice, or even a place where pilots can relay stories from the rides they have given. At this point in the organization's development, **increased structure within this platform makes sense in order to enhance both usability and efficiency.** These categories and the addition of a search bar would greatly help with the discussion part of the system, so people could look in the appropriate category prior to asking a question on a topic that may already be clearly explained.

Another improvement that should be made regards the platform's **accessibility.** Presently, not everyone in the organization has a login to The Hood, so they cannot access it at all, and it is **only available in English. We believe there should be some option for the platform to be translated into other languages,** encouraging more people to use it around the world. Ideally, in order to be the most effective help place, all chapters should have the option to use it as well. In addition, moderators would also serve an important role in the site's expansion, ensuring the most relevant and accurate information is posted.

Ultimately, The Hood currently has a strong conceptual background, but in order to bring the platform to its fullest success, and make the most collaborative community available, these are necessary changes.

---

### 6.3.2 BOOK2GO

As described in *Section 5.1 Book2Go Feedback*, people had a lot of opinions and thoughts surrounding the use of this as a booking platform, and we feel **this information will be instrumental in continuing Book2Go's development.** Some key factors here that we find instrumental to the software's development include fixing any problems on the technical end, including time zone problems, finding a way to allow pilots and riders to directly book/accept rides without needing a coordinator approval or email, and fully developing an updated map alongside individual chapter pages. More details on what people want can be found in *Appendices C & D.* These are important to improve functionality and user experience, and beneficial because this software is made by Christian for CWA, so once it is more developed it won't be incurring additional costs for the organization.

---

### 6.3.3 CRM

When looking into potentially having or recommending **CRM services for CWA, we recommend each individual desiring chapter applies for the proposed CRM separately to access the available NGO discounts.** Currently, Podio is serving the purpose of a form creation platform alongside some CRM functions for CWA International. This could be more useful if

every affiliate and partner had a place in Podio. Given that is not the case and unlikely in the near future, **developing a database or CRM connected to Book2Go could benefit the organization.**

Focusing on individual chapters, **we believe that directing new chapters to different CRM's they could use as an organization could be beneficial to their coordination and growth.** Partner A that we spoke to who used Monday as a CRM claimed that it was integral to their development as an organization and helped delegate tasks and assign priority. This is a good system to recommend to chapters as they try to understand everything in a new organization and is more cost effective than other options because they have a special package for nonprofits. The Monday platform has a package for nonprofits, where the first 10 users would be free. For a partner organization, this would mean that 10 chapters could use the platform before a monthly fee would be incurred, and this would allow them to communicate, delegate, and prioritize tasks effectively. This would also give a space where they could track fundraising or finance endeavors, something many chapters shared was important to them.

Other options include CRM's that may be included in the dashboards recommended in *Section 6.1* above, as well as CiviCRM which is connected with WordPress. This installment could be beneficial, as it would give access to CWA international and partner countries, allowing them to keep track of important information about one another as well as respecting the individual choices of different locations. If a chapter did not want to specifically add a CRM application into their landscape, a similar function could be done with the creation of a spreadsheet with different categories to be populated over time, however this would lack the intuitiveness present in a CRM development.

---

#### 6.3.4 GOOGLE WORKSPACE

Regarding Google Workspace, as it stands now, **some of the members of CWA have access to it, but not all. This is primarily due to a lack of volunteers taking initiative to set up their accounts** when the email is sent. Having access to the Workspace could be very influential to volunteers associated with this organization in order to help people in being interconnected, reinforcing the community. With this, we strongly recommend every coordinator and creator of a chapter be set up with the CWA email account, and also as volunteers join, they have access to this as well. This also **connects with the SSO application of the dashboard in the form of a log in**, and security for any CWA access point, so that you **must be a member of the organization by email to be able to access any of the shared technology.**

At the very least, **the coordinators and leaders of every chapter should have access to a CWA email**, as they are the ones who would have contact with CWA international the most. However, given the functionality of Book2Go, we believe that pilots and other volunteers would benefit from having a separate CWA email as well. Since every ride that is booked is then sent in an email to pilots to be taken or confirmed, being notified of these emails is important. If they are sent to someone's personal account, it may get lost in the mass of emails that are being received.

Having a CWA specific email prioritizes the content sent to and from that address and ensures that nothing is lost or buried.

## 6.4 PRIORITY AND COST

The needs explained to us by the chapters in all of our surveys and interviews are vital to the success of CWA’s IT strategy and therefore, were at the forefront of our proposed recommendations. **Many explicitly stated that their needs include having a website presence for both volunteers and riders, an effective booking platform, and ways to record finances and important information.** The repetition of these **three primary needs** was very evident, and thus the implementations and changes we described above all aim to structure the current systems, as well as recommended start up platforms, to chapters to satisfy these needs.

As a global organization, any alteration to the IT strategy and landscape is going to take time to implement, and people tend to be resistant to change. Therefore, we outlined the priority we believe each task should take because it is not feasible to implement all the recommended changes at once. It is not how long the changes will take, but rather which ones should be implemented first. The most notable necessary change includes integration and organization of platforms. Whether the organization chooses a dashboard approach or site integration approach allowing links between the different main sites when starting up, connecting the different services that are being used will help in giving a basic package to start up chapters. **We believe that Option 1 regarding the dashboard is the best technical solution; however, we are cognizant of the cost and thus gave both options.**

When deciding which option to move forward regarding integration, cost may be a deciding factor. **Figure 9 indicates the costs for different packages for an enterprise dashboard platform, as well as CRM costs.**

### Cost Analysis for CWAIT Recommendations



#### Dashboard vs. CRM Cost

| Dashboard                    | Price 1                             | Price 2                               | Price 3                               | CRM  | Price 1                | Price 2                | Price 3                |
|------------------------------|-------------------------------------|---------------------------------------|---------------------------------------|--|------------------------|------------------------|------------------------|
| Zapier                       | kr. 341.68 / month, billed annually | kr. 2,782.22 / month, billed annually | kr. 5,571.41 / month, billed annually | Monday (NGO package - 10 Chapters free/70% discount) | \$63.33 / month        | Same (NGO Price)       | Same (NGO Price)       |
| Make (Integromat)            | \$16 /month, billed annually        | \$29 /month, billed annually          | Sales Estimate Dependent              | CiviCRM  | \$10 / month           | \$25 / month           | \$50 / month           |
| NeonCRM                      | \$99 /month                         | \$199 /month                          | -                                     |  |                        |                        |                        |
| Kindful                      | \$349 /month                        | \$459 /month                          | -                                     |  |                        |                        |                        |
| Okta (NGO Package Available) | Contact Salesperson                 | -                                     | -                                     |  |                        |                        |                        |
| Average Price                | <b>\$128.20 / month</b>             | <b>\$271.11 / month</b>               | -                                     | Average Price  | <b>\$36.67 / month</b> | <b>\$44.17 / month</b> | <b>\$56.67 / month</b> |

Figure 9: Cost Analysis for Dashboard and CRM Recommendations

From here, **WordPress and Book2Go improvements should take priority**. As the most common and affordable CMS, WordPress is the most logical choice to use for the website, but its set-up needs to be more usable. Editing WordPress permissions and functionality will make it more accessible to the organization. This includes on the backend, for people developing sites, making it so access to other pages is restricted, as well as editing the structure of the WordPress to prioritize partner pages and push affiliate pages to Book2Go.

**By enforcing having country partner pages on the WordPress site, affiliate chapters can further develop their Book2Go page as their main CWA site**, with any external site they run on being accessible through that page. This brings in the integration with Book2Go and allows more organization on WordPress and freedom for chapters. It will also decrease the confusion associated with affiliates creating a page on the CWA WordPress. Development of affiliate pages on Book2Go will encourage more chapters to use the service to book the rides, as well as allow for there to be an automatically updated map through the app. This will help people to find chapters near them from the global WordPress page, to get from the country partner to the local affiliate in Book2Go, and then access emails and individual sites from there. Additionally, in order to be a usable service, the technical improvements and edits as outlined above and in Appendix D.

The last necessary change in the CWA IT landscape includes improvements within community discussion, marketing and fundraising. This includes **the development and structure of The Hood**, which will allow starting chapters to access and understand pertinent information more easily. With the ability to translate the information on this platform, as well as categorize the content appropriately, volunteers will gain more value looking for information. Then, recommendations of a **CRM for task and data organization**, as well as recommendations for best marketing practices, and a “**Donate**” button, will allow startups to go more smoothly when beginning. It will ensure that they can fundraise effectively, promote their chapters, and delegate and organize tasks appropriately.

## 7 FOLLOW UP AND RECOMMENDATIONS

Following the conclusion of our work on CWA's IT strategy, we want to ensure that we are providing appropriate tools for CWA to continue the work on its IT strategy. We will provide access to the surveys sent to chapters, so CWA may continue to have access to chapter and partner feedback on IT struggles and successes. This also ensures that if results do continue to roll in, they can use this feedback to pivot or edit their strategy as they see fit. From here, we would also like to aid in Christian's development endeavors and suggest WPI continue to work with CWA on this and other projects.

### 7.1 VOLUNTEERS

Christian mentioned that a valuable outcome of this project is feedback from people within the organization who would be willing to help in the development of Book2Go and maintaining the IT landscape. We investigated the survey responses and found that **many of the respondents shared that they used to work with IT, or have some experience with IT, and were both willing and eager to share their knowledge** or help in any way. Christian finds this feedback invaluable, because if there are people willing to help with the development of Book2Go, or maintenance of The Hood, and other platforms, they could be in better working order in a decreased amount of time. We will give Christian access to these people who want to help, along with the suggestion that he send a message to all the partners regarding any willing members of their chapters who may want to participate in this development.

### 7.2 FUTURE PROJECTS

**Looking into future WPI involvement, we believe there is potential for both IQP and MQP projects with this organization.** Starting with IQPs, there could be a future iteration on this project within the next two years, to see where it has progressed, and where further changes or iterations could be made. Looking towards next year, another project surrounding **The Hood** would be invaluable to the organization, as developing it to have more structure and sections as described above would be very beneficial to the usability of the application. This would encourage people to use it more, as well as allow starting chapters to find necessary information and have questions answered with ease.

Finally, an MQP connected with the development and growth of **Book2Go** would be very beneficial. Christian cannot dedicate all his time to developing the software of this application but has a lot of hope and ideas for where it can go. Having an MQP dedicated to this mission could place majors in Computer Science, Data Sciences and Interactive Media and Game Development (IMGD) in a position to make a lasting impact on the organization and help come up with the appropriate backend code and functionality. It is a far more technical endeavor than

is common to IQP and would benefit from having 3 or 4 terms of work, fitting in perfectly with the timeline and requirements of an MQP.



## References

- Borremans, A., M. Zaychenko, I., & Yu. Iliashenko, O. (2018). Digital economy. IT strategy of the company development. *MATEC Web of Conferences*, 170, 01034. <https://doi.org/10.1051/matecconf/201817001034>
- Bunch, T. (2018). Advocating for strategic IT: Phenomenological study of nonprofit IT leaders *ProQuest*. <https://www.proquest.com/publiccontent/docview/2022345299?pq-origsite=primo>
- Cabot, J. (2018). WordPress: a content management system to democratize publishing. *IEEE Software*, 35(3), 89–92. <https://doi.org/10.1109/MS.2018.2141016>
- Cycling Without Age. (2019). *The Hood Online Community*. Cycling Without Age. <https://cyclingwithoutage.org/the-hood/>
- Farkhondeh, M., & Müller, B. (2021). Holacracy: A New Way of Organizing? *Management Revue*, 32(4), 302–317. <https://doi.org/10.5771/0935-9915-2021-4-302>
- Find out all about us*. Cycling Without Age. (2022, June 22). Retrieved February 6, 2023, from <https://cyclingwithoutage.org/about/>
- Forbes Panel®, (2022). *Council Post: 10 challenges global nonprofit leaders are currently facing (and how they're tackling them)*. Forbes. <https://www.forbes.com/sites/forbesnonprofitcouncil/2022/03/16/10>
- Gray, R., & Gow, A. J. (2020). Cycling without age: Assessing the impact of a cycling-based initiative on mood and Wellbeing. *Gerontology and Geriatric Medicine*, 6, 233372142094663. <https://doi.org/10.1177/2333721420946638>
- Hammerstrom, J. (2019, December 2). IT Support for Nonprofits: A Strategic Guide. *Community IT Innovators*. <https://communityit.com/it-support-for-nonprofits-a-strategic-guide/>
- Heffernan, C. (2023, January 6). *11 Key Components of an Effective IT Strategy*. Burnie Group. Retrieved January 20, 2023, from <https://burniegroup.com/4-most-important-aspects-of-a-successful-it-strategy/>
- Holacracy vs Hierarchy*. Charterhouse SG. (n.d.). Retrieved February 6, 2023, from <https://www.charterhouse.com.sg/blog/2018/10/holacracy-vs-hierarchy?source=google.com>
- Pratt, M. K. (2020, November 30). *What is IT Strategy? A definition from whatis.com*. CIO. Retrieved January 20, 2023, from <https://www.techtarget.com/searchcio/definition/IT-strategy-information-technology-strategy>
- Technology in Schools*. (n.d.). Retrieved February 6, 2023, from [https://nces.ed.gov/pubs2003/tech\\_schools/chapter7.asp](https://nces.ed.gov/pubs2003/tech_schools/chapter7.asp)
- U.S. Department of Health and Human Services. (2019, April 23). *Social isolation, loneliness in older people pose health risks*. National Institute on Aging. Retrieved February 6, 2023, from <https://www.nia.nih.gov/news/social-isolation-loneliness-older-people-pose-health-risks>



What is Podio - And How to Better Structure Your Business. (2019, June 7). *Tallyfy*.  
<https://tallyfy.com/what-is-podio/>

*Why we're taking on Holacracy and changing The way we work*. CompassPoint. (2016, April 5).  
Retrieved February 6, 2023, from <https://www.compasspoint.org/blog/why-we%E2%80%99re-taking-holacracy-and-changing-way-we-work>

## Appendices

### APPENDIX A: INTERVIEW QUESTIONS

#### A.1 OLE QUESTIONS

Interview questions for Ole, the founder of CWA, to be used during the first round of interviews and research in order to get an overall idea of the needs of the organization and begin further understanding of how they are currently being fulfilled.

Consent: We are a group of WPI students working with Cycling Without Age in order to improve their IT strategy to allow them to continue growing as an organization and spreading their mission. For the purposes of our research project we would like to ask you some questions regarding the current IT strategy at CWA in order to help us understand the organization's needs and problems further. This interview should take approximately 10-20 minutes, responses to any questions are completely voluntary, and we would like to use your name in connection with this information if possible. Do you have any questions before we begin?

1. What are the technological needs of CWA as an organization?
2. Could you describe the current state of your IT strategy in a few words or phrases?
3. Have there been IT strategy changes in the past?
4. Is there anything that you can point out as specifically not working?
5. Which platforms cause the most problems or difficulties?
6. With regard to integration, what is most important to have connected?
7. You noted that you really like Podio and how it is set up, can you talk a little more on that platform and some of its strengths and weaknesses with regard to what you use it for?

#### A.2 PERNILLE QUESTIONS

Interview questions for Pernille, to be used during the first round of interviews and research in order to get an overall idea of the needs of the organization especially considering those of newly beginning chapters, and begin further understanding of how they are currently being fulfilled.

Consent: We are a group of WPI students working with Cycling Without Age in order to improve their IT strategy to allow them to continue growing as an organization and spreading their mission. For the purposes of our research project we would like to ask you some questions regarding the current IT strategy at CWA in order to help us understand the organization's needs and problems further. This interview should take approximately 10-20 minutes, responses to any questions are completely voluntary, and we would like to use your name in connection with this information if possible. Do you have any questions before we begin?

1. What are the technological needs of CWA as an organization?
2. Have there been IT strategy changes in the past?
3. Is there anything that you can point out as specifically not working?
4. Which platforms cause the most problems or difficulties?
5. With regard to integration, what is most important to have connected?
6. You've spoken about really liking Podio and the qualities that it comes with, could you elaborate on what you use Podio for, and how it satisfies these needs?

---

### A.3 CHRISTIAN QUESTIONS

Interview questions for Christian. As the IT Specialist at CWA Christian is someone we will be working with frequently and periodically in order to obtain consistent and relevant information both in regard to what they are using as current IT platforms, along with where there may be problems. He also will be able to help us understand how their holacratic structure could be affecting this strategy, and how far we can go in specifications without overstepping.

Consent: We are a group of WPI students working with Cycling Without Age in order to improve their IT strategy to allow them to continue growing as an organization and spreading their mission. For the purposes of our research project we would like to ask you some questions regarding the current IT strategy at CWA in order to help us understand the organization's needs and problems further. This interview should take approximately 10-20 minutes, responses to any questions are completely voluntary, and we would like to use your name in connection with this information if possible. Do you have any questions before we begin?

1. You've given us a list of all of the systems that are used, which would you say are the most important?
2. Are there any systems that you find difficult to use or strongly advise CWA moves away from?
3. Are any platforms already integrated?
4. Are there any platforms you think should particularly be integrated?
5. One of the primary goals we were given was integration. One thing we learned about in our research was that CiviCRM is easily integrated with WordPress, and as you've stated there is not a specific CRM for the company at present. Is this something that you think could be useful as growth continues?
6. Why is Book2Go not a standard practice for the booking platform? Are there many chapters that don't use it?
7. We now know that WordPress is the most expensive piece of technology you spend money on, and have discussed that it is both ineffective and effective for different reasons. If there was a single domain for CWA, with just links to the other country chapters on a site of their choosing, do you think this could be beneficial or would such an action just increase the problems further? Would this receive pushback?

8. Which platforms are the most effective for their intended purpose?
9. Is there anything else you can tell us now that could be helpful as we continue to analyze the current IT landscape, and recommend ideas for a new one?

## APPENDIX B: SURVEY QUESTIONS

### B.1 PARTNER

Survey questions for the different partner and affiliate chapters. This will be sent out to as many chapters as we are able to reach in order to receive the largest amount of responses as possible. The responses to these questions will help us analyze trends and patterns and allow us to begin deciding who to interview. This survey will be done using Google Forms, which us and CWA have access to. Google Forms allows us to easily transfer the responses to Excel, in order to create charts and diagrams displaying recognizable patterns.

Consent: We are a group of WPI students working with Cycling Without Age in order to improve their IT strategy to allow them to continue growing as an organization and spreading their mission. For the purposes of our research project we would like to ask you to answer some questions regarding the current IT strategy at CWA in order to help us understand the organization's needs and problems further. This survey should take approximately 5 minutes, responses to any questions are completely voluntary, and no name will be connected with this information other than the location of the chapter, which will also only be published after specific follow up and permission from the chapters. Do you have any questions before we begin?

1. What country are you overseeing affiliates in?
2. How many affiliates are under your supervision?
3. Do you use CWA's shared WordPress installation as your main website?
4. If you use this installation, do you think it works well for you? If not, what do you dislike about it, or what other website do you use?
5. What email platform do you use?
  - a. CWA Google Workspace
  - b. Gmail
  - c. Office365
  - d. Other
6. What booking system do you use?
  - a. Book2Go
  - b. Google Calendar
  - c. Signup Genius
  - d. Other
7. What do you use for organization/member management?
  - a. Excel/Spreadsheets

- b. Podio
  - c. Better Impact
  - d. Other
- 8. What do you use for newsletters?
  - a. Mailchimp
  - b. Other
- 9. What do you use for planning?
  - a. Excel
  - b. Google Calendar
  - c. When2Meet
  - d. Other
- 10. How do you manage any donations or applications?
- 11. Are there any other systems you use in your technology?
- 12. What do you feel your needs are as a partner?
- 13. How do you view the needs of the chapters you oversee?
- 14. What IT services do you prioritize most?
- 15. Are there any IT services CWA currently uses that you feel are unnecessary?
- 16. How much of your current IT services do you pay for?
- 17. Would you be willing to contribute more money, for a better solution to your IT needs?
- 18. Would you be willing to participate in a follow up interview so we can learn more about your system use and needs?
  - a. If you would like to be interviewed, please provide your email here.
  - b. Please briefly explain what you think should be discussed in this interview, so our team is able to prepare accordingly.
- 19. Is there any other relevant information you can provide us with for the purposes of this project?

---

## B.2 AFFILIATE

- 1) What country is your chapter located in?
- 2) Where is your chapter in this country? (Note: This is solely for tracking survey responses, this information will not be published)
- 3) Do you have a trishaw?
  - a) If you have a trishaw, how many?
- 4) What would you say your technology needs are?
- 5) Do you use CWA's shared WordPress installation as your main website?
  - a) If you use this installation, do you think it works well for you? If not, what do you dislike about it, or what other website do you use?
- 6) What email platform do you use?
  - a) CWA Google Workspace
  - b) Gmail
  - c) Office365
  - d) Other

- 7) What booking system do you use?
  - a) Book2Go
  - b) Google Calendar
  - c) Signup Genius
  - d) Other
- 8) What do you use for organization/member management?
  - a) Excel/Spreadsheets
  - b) Podio
  - c) Better Impact
  - d) Other
- 9) What do you use for newsletters?
  - a) Mailchimp
  - b) Other
- 10) What do you use for planning?
  - a) Excel
  - b) Google Calendar
  - c) When2Meet
  - d) Other
- 11) How do you manage any donations or applications?
- 12) Do you find any of the platforms asked about above to be inefficient or confusing? If yes, which ones and how so?
- 13) What do you find to be most useful regarding the technology you use?
- 14) Do you think that the offered platforms are too expensive? Explain if possible.
- 15) Are there any concerns or changes you would like to bring to our attention regarding your IT use or needs?
- 16) Would you be willing to contribute some amount of money monthly/yearly towards your IT needs?
- 17) Regarding your IT needs, what services do you prioritize over others? (ie, website, email, booking, planning, organization)
- 18) During the start up process for your chapter, did you come across any notable problems with IT? Explain please.
- 19) Would you be interested in any of the options below?
  - a) Nothing offered by CWA for IT
  - b) A basic IT package with only the essentials
  - c) A basic package with essentials, with the option to activate additional services as your chapter grows
  - d) A big package with all services made available and set up, ready to be used
- 20) Would you be willing to participate in a follow up interview so we can learn more about your local system use and needs?
  - a) If you would like to be interviewed, please provide your email here.
  - b) Please briefly explain what you think should be discussed in this interview, so our team is able to prepare accordingly.
- 21) Is there any other relevant information you can provide us with for the purposes of this project?

## APPENDIX C: SURVEY RESULTS

---

## C.1 AFFILIATE RESPONSES TO QUESTIONS

*What would you say your technology needs are?*

- Website presence
- Operational website for volunteers
- Online system for sharing info amongst pilots for ride appt
- Tool to help pilot retention
- Fundraising platform (including donor management)
- Booking Platform (x5) (including comments about app based, and adaptability)
- Record keeping system for finances/important form availability
- System to track ride # and volunteer hours
- Volunteer scheduling (x2)
- Liability waiver collection
- Ride Booking System

*If you use WordPress, do you think it works well for you? If not, what do you dislike about it, or what other website do you use?*

### IF YES

- Contact someone else to update their site
  - Doesn't need to be updated often
  - Has basic contact info for chapter/location
- Netherlands some affiliates use it and some do not
- Serves the purpose of main external website
  - Changes are centralized so not convenient to dynamically update it
  - Most of dynamic marketing they prefer to use Facebook
  - Have own Google site geared just toward volunteers and senior facilities

### IF NO

- Very overwhelming
  - Access to other chapters information/site
  - Difficult to understand
  - Uses Wix.com, wants this site linked to CWA
  - Wix has more options and is easier to maintain than WP
- Uses FNRT.org site instead
- Joomla
  - Don't have to ask anyone in Denmark to change data which is time consuming
  - Is open source software which is important
- We have a page on our sponsor organization website (a bike advocacy nonprofit)

*How do you manage any donations or applications?*

- Zoho Books online
  - Also gives finances
- Through FRNT (website)
- Applications through Google sheets
  - People need to let them know when they fill out the form because no notifications
  - Then printed for follow up

- Signed docs stored in Google drive
- Use nonprofit status to apply for grants and local business sponsorships
  - Use a nonprofit senior service org website
- Manually
- Donations through CWA Australia
- Own foundation and acct through website
- Seek out grants for most of funding handled by treasurer
- Give funds to fiduciary (big word for treasurer) 501(c)(3)
- Manually

*Do you find any of the platforms asked about above to be inefficient or confusing?*

*If yes, which ones and how so?*

- Generally integration
- Book2Go needs approved pilots and passengers to be able to schedule and send messages
- Book2Go is problematic as people find it confusing to book rides
  - Improve: editing existing rides to change time, ability to add multiple rides at a time, minimize email comm to pilots
- Like Book2Go except is designed for facility based chapter
  - Difficult to sign up riders
  - Time zones cause problems
  - Need pilots to sign up riders on own
- No platform effectively supports their 8 trishaws
- Signup Genius is good for creating slots and having volunteers signup
  - Doesn't do anything for allocating resources (ie trishaws)
- Google Calendar is not the best as some pilots have trouble placing their appts in the correct calendar
- Generally like Book2Go,
  - looking forward to next version with some glitches fixed. Would like to get away from overuse of email

*What do you find to be most useful regarding the technology you use?*

- Book2Go and Google Workspace have potential
- Book2Go provides requisite calendar for ride booking
- Excel and Docs
- Like Book2Go allows ride to be sent to all pilots as a first come first serve
  - Easy to use
  - Easy for new profiles to be made
  - Like process of approving riders, training, etc.
  - Like notes feature for rides
    - Need it for instructing pilots where to get riders
- Email
- All cumbersome without ability to link effectively to send newsletters or text
  - Doesn't let contact passengers effectively to reschedule or cancel rides (Book2Go)
- Went paperless this year by implementing electronic liability forms using smart waiver



- Issue smartphone to each facility that has a kiosk app on it to get form signed ahead of ride
- Records name of rider so that is saved as well
- Implemented new op website for volunteers so they can check waiver status, access contact info, ride location info, route maps, and administer satisfaction survey
- Ability to share appt info with others to know if trishaw is available

*Do you think that the offered platforms are too expensive? Explain if possible.*

- Book2Go didn't seem very expensive for the available options
  - Just wished up and fully functioning
- No
  - Would pay more for more development
- Book2Go is about 10 CAD a month which is fine
- Book2Go free so far, love
  - Any platform used has to be affordable
- Don't pay for any
- For the money they're paying, communication to CWA international should be efficient
- Cost is not the problem, functionalities don't match operating model
  - Do not store trishaws at care facilities as they do in EU
  - Separate storage requires transport to ride facility
  - They need more logistics for transport/storage info
- Not paying

*Are there any concerns or changes you would like to bring to our attention regarding your IT use or needs?*

- Would like to draw people to FNRT site for info and scheduling
- Always looking for Book2Go to evolve and appreciate Christian's work in helping
- Need time zone issue resolved
  - IT solution needs to be easy to use
  - Volunteer pilots come with a variety of technological abilities
- Doesn't use much IT, but publicizes trishaws by going to local farmers markets
- For now Signup Genius, Smart Waiver, Google sites, Google sheets, seems to work
  - Would be nice to have integration into one tool (seems like a lot of custom development)
- Biggest issue is pilot retention leading to fewer rides, IT to solve this may be useful
- Most members are computer illiterate or very limited experience

*Regarding your IT needs, what services do you prioritize over others? (ie, website, email, booking, planning, organization)*

- Website presence is 1st
  - Booking is 2nd - if it's easier people will more frequently use it
  - Behind the scenes operations (email/planning/organization/financials) have less priority
- Booking

- own profiles for approved pilots and passengers so they can self schedule and communicate with each other to take burden off of volunteer coordinator making repeated phone calls for 25 rides per week
- Booking, planning, organization
- Booking
- Booking
- Website is great for people to learn about CWA
- Booking, planning, communication
- Booking, Volunteer management, email, website
- Booking/Signup by volunteers
- Shared ride booking system
- Something to help with pilot retention
- Communication with volunteers (email), booking system (Book2Go)

*During the start up process for your chapter, did you come across any notable problems with IT? Explain please.*

- Experiencing a lot of ancillary systems that are all independent of each other
  - Took lots of research to figure out exactly what I was supposed to be doing
  - Would be helpful if CWA provided better, more detailed startup instructions
  - Apprehensive of WordPress
- Wish we were provided digital CWA logo templates or automatically with our chapter name
- Book2Go not designed for our community based chapter
- CWA Australia were using Rosterfy for bookings
  - Too difficult for pilots and management
- No effective volunteer management system
  - No effective booking system
  - Available systems did not grow with our chapter
- Built own website
  - Understand that most people are unable to do this
- Trying to figure out which volunteer/booking management system to use
  - Ended up with Signup Genius because there was enough functionality there with some minimal customizations to fit our initial needs
- Trying to figure out multiple ride locations scheduling and booking seniors not living in facilities. Also need better communication system with volunteers.

*Other relevant information you can provide?*

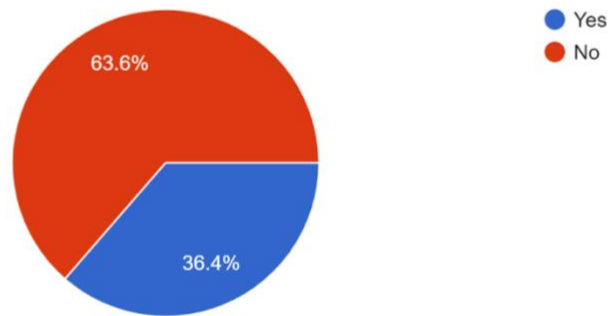
- Willing to help
- Want promotional material that can be easily customized to provide details for local chapter
- Largely depend on senior care facilities to manage riders (can just show up with pilots + trishaws)
  - Public rides, partner with our local conservation district and park districts with existing program registration functions
  - Don't do any rider registration unless it is for a special event we are running ourselves

- Rider registration could be a need if we do more on our own, separate of our partners
- Pilot retention IT tool

*Graphs reflecting answers to survey questions:*

Do you use CWA's shared WordPress installation as your main website?

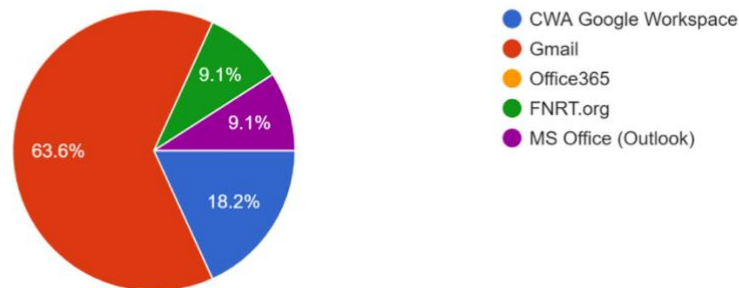
11 responses



*Figure 10: Pie chart demonstrating affiliate use of WordPress*

What email platform do you use?

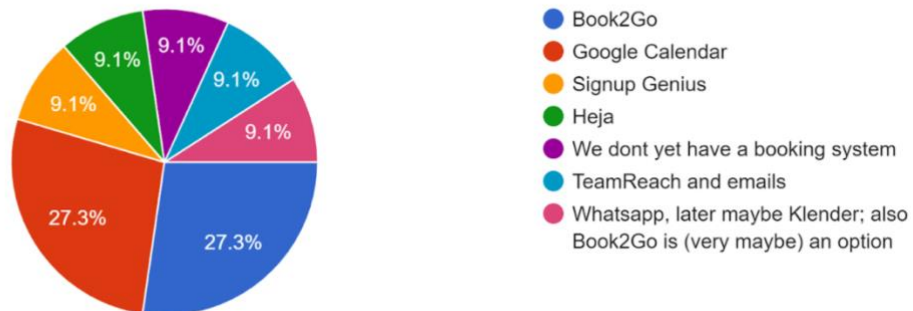
11 responses



*Figure 11: Pie chart demonstrating what email software affiliates use*

What booking system do you use?

11 responses



*Figure 12: Pie chart demonstrating what booking system affiliates use*

If you have a trishaw, how many?

10 responses

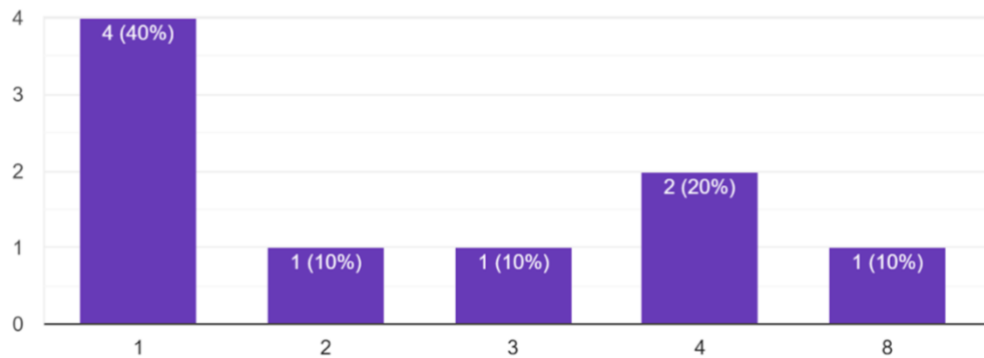


Figure 13: Bar graph demonstrating the count of trishaws for a given chapter

What do you use for organization/member management?

11 responses

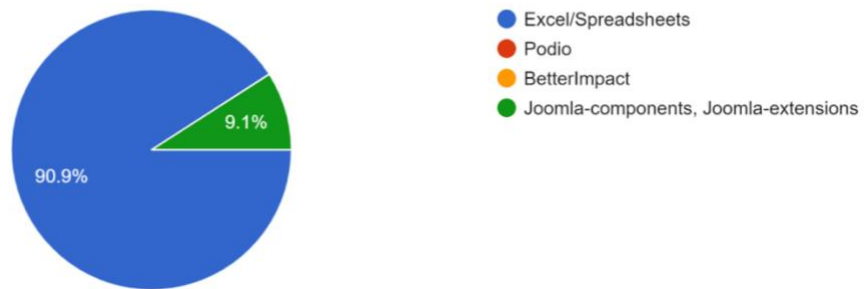


Figure 14: Pie chart showing what is used for organization of chapters

What do you use for newsletters?

10 responses

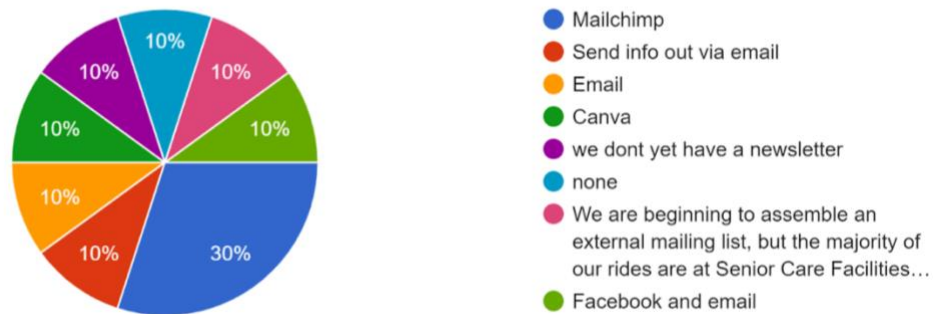


Figure 15: Pie chart showing what system is used for newsletters

What do you use for planning?

11 responses

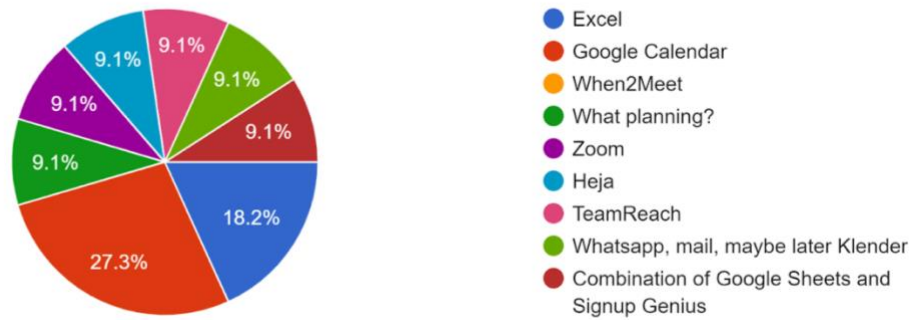


Figure 16: Pie chart showing what system is used for planning

Do you have a trishaw?

11 responses

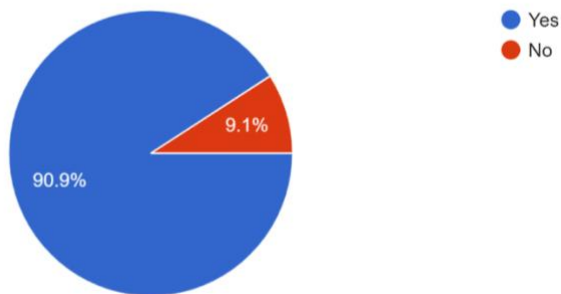


Figure 17: Pie chart demonstrating if a chapter does or does not have a trishaw

Would you be willing to contribute some amount of money monthly/yearly towards your IT needs?

11 responses

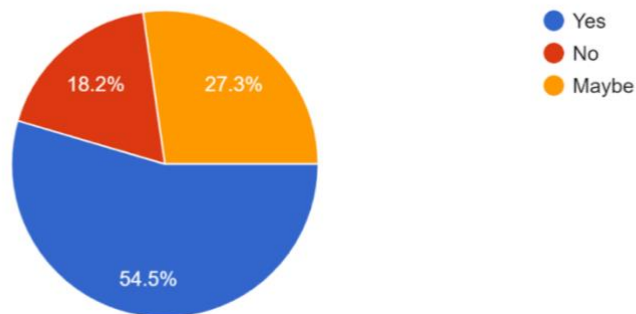


Figure 18: Pie chart demonstrating willingness to contribute money to the technology

Would you be interested in any of the options below?

11 responses

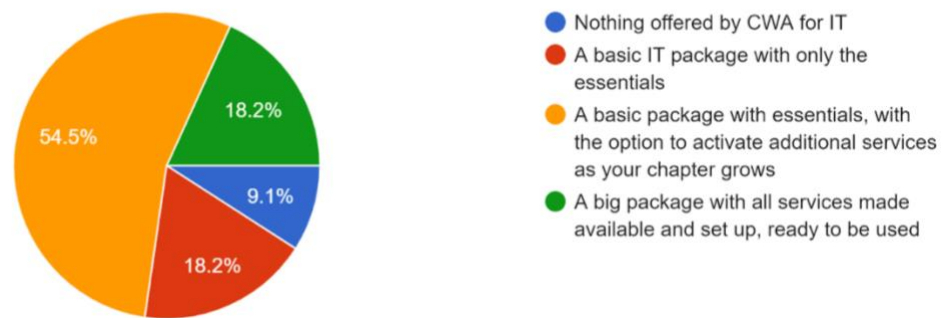


Figure 19: Pie chart showing different packages to offer start ups

---

## C.2 PARTNER RESPONSES TO QUESTIONS

### *Number of Affiliates:*

- 61
- 1
- 105 (trishaws), 49 (fundraising)
- 1
- 62 (trishaws), 50 locations
- 135
- 3
- 47
- 1
- 4

*If you use WordPress, do you think it works well for you? If not, what do you dislike about it, or what other website do you use?*

- Works fine
  - Would likely use it if they had something more robust
  - Finances are an issue
- Works okay
- Works well
- Aesthetic of local website could be improved
- Works okay
  - Struggle with some of the templates
  - Outdated look and feel
  - Limited formatting and layout options
  - Limited add ins (Stipe being the biggest one)
  - Limited accessibility options (Limited micro interactions)
- Too restricted
- Okay
  - No web genius but try to keep it working

- Like to be able to distribute rights to local affiliates to edit pages
- Fits well
- Other person takes care of website
- Works fine
- WordPress is too expensive as we are a nonprofit

*What do you feel your needs are as a partner?*

- Need CWAI and Copenhagen Cycles to direct any inquiries for Scotland to us as we have commitment to the Scottish government to maintain regulations surrounding CWA Scotland
- More grant funding
  - Main grant requires a 20% match
- A website with a different aesthetic
  - Booking system they can use
    - Cannot use Book2Go
  - Any technology to capture, order or automatically store data for each passenger and pilot
    - In order to better obtain KPIs
- Connection and inspiration from chapters across the globe
- Needs are localized since there are government requirements as a registered charity
- Good level of communication between CWA HQ and Copenhagen Cycles
- Some alterations in Book2Go before we can roll it out
- Good functioning systems
  - Easy to handle
- Find local supporters to fund new trishaws
- None
- We need financial means to run activities in real time

*How do you view the needs of the chapters you oversee?*

- Managed with ease
- Helping others to become self sufficient on our booking platform
- Struggles with overseeing affiliates on occasion
  - Offer recommended basics to get started and then rely on peer to peer network
  - Would be nice to continue to have a single source of tools for chapters around the globe
  - Smart decisions in early days to have one database for applications from around the globe
  - One flickr account of digital images that everyone can contribute and be inspired and share
  - There really isn't any differences amongst countries - prioritize simplicity
- Ability to connect with other chapters to share resources and best practices
- Answer all emails and phone inquiries asap
  - All the Irish chapters/trishaw owners know how to contact me
- German language support
  - Booking system
  - Cloud solution

- Some of them don't even understand that they are part of CWA Austria
  - Unfortunately, many are not even aware of the size of the global organization
- I think they need to find ways to finance the project
- Good

*Regarding your IT needs, what services do you prioritize over others? (ie, website, email, booking, planning, organization)*

- Email and zoom
- Websites and emails
- Info sharing and scheduling
- Google, WordPress, Podio
- Website, email, operational systems
- Email, Facebook group, twitter
- Book2Go
- Microsoft Office
- All equally
- CRM
- Home page, Book2Go, Accounting Platform, Zoom
- Excel/Word
- Happy for Book2Go
  - Implementing and translating to native language

*Are there any IT services CWA currently uses that you feel are unnecessary?*

- No (x5)
- No (x4)
- No
  - Impressive services for organization of this size
  - Turnaround time for question responses is expedient
- Do not use general pages/services
- Don't have booking tool and rarely look at Podio
- Used the Hood forum and Book2Go.
  - Don't have any info on other IT systems we can use

*How much of IT services do you currently pay for?*

- Quarterly invoice from CWAI
- Most of it
- 10%
  - Rest is in kind donations
- Crello, Trello, and Padlet
- 960 Euros a year for English and French website
- Active volunteer support - free support
- 480 Euros to CWA HQ for website
  - Pay for software myself
  - Do not pay for advertising
- Website
- Book2Go



- All of them
- Nothing
- Website, Domain for mailing address: 60 Euros/Year

*Any other relevant info?*

- Want to know more about available resources
- Upcharges for current web presence
  - Having bilingual site would be beneficial
- There's free Office 365 and Canva for NGO's and discount for Trello, Zoom and Calendly

## APPENDIX D: FOLLOW UP INTERVIEW RESULTS

### D.1 PARTNER RESPONSES

#### *Partner A*

1. We know you don't have the WordPress website but instead have built up your own site using a different platform. Can you tell us a little more about this choice?
  - Site was created when country became a partner
  - Founder in country made it while talking to Ole, and intended to help with building out the international page, but then had to leave the company
  - This site still links back to the international CWA page
  - The website has a lot of foot traffic
    - Aesthetically pleasing
    - Booking from here
    - News, links, and donations can also be easily found
  - They pay for the WordPress domain, but it is not functional
2. You shared in the survey that something you would prioritize using would be your CRM, is this a system you already have implemented or are you saying you'd want one? If you do use one, what is it?
  - The CRM used is Monday, which has a nonprofit specific plan
  - Works well and plans to develop it further
    - Thinks other chapters could benefit from this platform
  - In it there are tasks, responsible parties, status of task as well as priority, and different pages with different information
  - Operations and tasks are there to coordinate amongst volunteers, and there are separated sections for the different chapters
  - Inside there are details with additional information with links to other sites, filters, etc.
3. In terms of your CWA booking platform, you shared you've used Google Calendar, how does this system work for you?
  - Works well, they have a google form on the site for people to fill out and they are then contacted by a volunteer using an internal site to book it
  - Generally 28 pre scheduled rides per week
  - Volunteers have access to a Google sheet with all the rides for the month, and they can select and sign up to take them from here

- Communication primarily through WhatsApp
- Rides are done using WIKI
  - Volunteers have documents and a place to ask questions here
  - Then select route, and get a sheet with date, location, contact, hours for the ride, the route map, and choosing the trishaw
  - After the ride they can include the notes of the ride
  - Volunteer editor access is restricted
- a. Have you considered using Book2Go as a booking platform for your chapter?
  - No, their platform works well for them and they are better trained to use it, and it's free
- 4. Are there a lot of integration between the platforms you use or do you think more is needed?
  - The way they have it coordinated works with some integration of website and booking
  - It's currently the best way for them to grow
- 5. Where are common IT problems occurring, especially in your chapter's start up process?
  - No problems here
  - Use The Hood for any random questions or to find information they could need
  - They've been a partner for 2 years
  - And they use Ole, Pernille, and Kiera for support
- 6. Is there anything else you would like to talk about or want us to know? (ease of meeting with other chapters to discuss best practices?)
  - Would like to see more sharing between chapters, something like an annual meeting of sorts in order to share practices, ideas, or storytelling

### ***Partner B***

1. You shared that you have your primary web page on WordPress, how was the building of this page and do you like the way it functions and works? Was it difficult starting?
  - Didn't personally start it, but chapter started in 2015
  - Local chapters have a lot to do setting things up on their own when they get their URL
    - Right now everything done by her and volunteer structure wise, only thing they really get is a menu bar, they don't really have support here
    - Website is not on their server so they can't access where the personal data is stored which causes complication with GDPR
    - Want a more administrative view in order to see foot traffic and statistics of those visiting the website
2. In terms of your CWA booking platform, you shared you use something called ROAD. Can you share with us a little about what this looks like, how it works, and why you like it?
  - Made their own system
  - When Book2Go was released this was already made with additional detail, and so it was kept
3. Are there a lot of integration between platforms or do you think more is needed?
  - There could be some, but it's not set up

- There are tools to connect Gmail to Podio and such but they are not currently being used
  - Partially due to a lack of knowledge of how to integrate
4. You shared that you use Podio, how does this service fit into your technological landscape?
- Started using late in 2020 because another NGO taught them how to use it, now they have databases located in Podio with info about many things
    - People interested in joining, people who have joined, weekly report there, etc.
    - There was an issue with deleting a whole database and then it disappeared and they could not get it back, so they had to go back and change those
5. Where are common IT problems occurring, especially in your chapter's start up process?
- Affiliates have very little IT knowledge
  - There is a membership space on the website and people can't really access that
  - The Hood is really difficult to understand
  - Struggle with even setting up a CWA email
  - It would be nice to have someone set up these things to support them because they struggle to get everything together to get started
  - Want a platform where they can do all the accounting work there, many people go through and do this all manually because they don't want to try to learn a new platform
  - \*\*Fundraising platform and IT support would be great
6. What are some improvements/goals you would like to see within the CWA technological landscape?
- Having more clarity about data storage location (not necessarily a new platform, tends to look for solutions within network)
  - Acknowledges diff between CWA having global platforms, could also be national
  - Used to have more control from CPH, now it's more coming from the national chapters, and this will affect IT
7. If CWA International were to hand a new chapter an IT startup guide that outlines detailed instructions on how to set up their IT platforms, do you think it would be well received or face push back?
- Language is often an issue
    - Most of local chapters do not speak English, there would be a need to have it in native language making things difficult
  - The Hood and everything is in English, and so she has to go in and translate for it to be even moderately useful
8. Is there anything else you would like to talk about or want us to know?
- Cost, not that not willing to pay, but if they don't know exactly where the money is going it's hard to rationalize paying more if that was an option

---

## D.2 AFFILIATE RESPONSES

### *Affiliate A*

1. You mentioned you're a newer chapter, and have been nervous/apprehensive about using WordPress, can you talk a little bit about that?
  - Overwhelming to use WordPress

- Used previously on some website design, but site design here gives access to a lot of pages that they feel like they maybe shouldn't have access to
    - Could accidentally mess something up (can see everyone's)
  - Wants to be able to set up an external link on the international page to the site they use
  - Wants presence on the main page but to have their own site elsewhere
  - Funding is difficult so getting the site up and running is imperative
  - Having a template to create own page on the website would definitely make them more incited to use it, and would be very beneficial to encouraging cohesiveness
    - Increase sense of community and belonging
2. You noted that as an alternative to WordPress you plan to use your club's Wix.com site, how do you want to do this/are doing this?
- There is a bike club, and they have CWA sharing this site
  - Here they share who they are and how people can make donations
  - Doesn't have the time to dedicate to building a WordPress presence, and so uses already created site
  - Doesn't have the time to delve into and make WordPress, and so uses their own site for just ease of use and it works
3. You mentioned using Book2Go as a booking system, we've heard that it can be particularly difficult to get started/registered with, what has your experience been?
- Booking and training system with the pilots seems effective
  - Can be a little finicky with user login
  - Lots of back and forth emails which isn't ideal
  - Wants organizer to see everything, currently site is more pilots booking for themselves
    - Higher level of management as the organization grows to hold people accountable
  - UI could be more accessible with pilot name in calendar section for who has a ride for accountability
4. You said there was a lot of research to do to get everything started, do you think there could be some better type of welcome message/starter package that could work better? Do you have any idea of what this could look like?
- Website presence could be done better
    - If someone knew nothing about tech it would be very overwhelming
  - Really likes Book2Go, wants to see it keep developing
  - Having CWA.org and .com is a little confusing (one is the international page and one is the US), makes it feel disconnected
  - Some kind of starter package would be useful
  - It's time consuming to get everything together to start a chapter, found it easy yo get branding but finding things for insurance/liability was difficult with a lot of things just strung together on the Hood, was a lot to sort through
5. For the purposes of this project we are trying to come up with different ways to integrate some of the systems (booking, website, email, communication), and overall find a more efficient solution. Right now, we're thinking about the best ways to improve the book2go system, and looking into a dashboard for users to

login and have access to everything they need in one location. We also are looking into WordPress, to try and have some better solutions there, and having an automatic updating CRM to keep track of volunteers/customers as well. Do you have any ideas or things you'd also like to share about IT improvements you feel could be worthwhile?

- Document maintenance and vetting in the Hood
- Having some type of forms library or directory
- Tying together/integrating apps on the back end would be very useful, as would be having some type of dashboard for booking, communication, website, etc.
- App integration
- Crowdsourcing or fundraising app that's robust/secure

### ***Affiliate B***

1. What systems are being used within your chapter?
  - Website uses the organization web page, part of a Trails Group that started their chapter
    - Fnrt.org
  - From here you can get to the CWA page
  - You cannot access the fnrt page from the international site
    - The only view of them here is on the map and it connects to a personal Gmail
      - Would be more beneficial to have linkage to the website here
2. In terms of your CWA affiliate website, did you create it using WordPress?
  - No, they use the organization site
  - Since the rail trail has been operating, this allows them to have a stronger online presence
    - It's easier to use and has more programming (uses *squarespace*)
    - Prefer to have their own domain name and website, don't want to be confined to restraints
  - Wants their chapter to be a service that fnrt are using for the community
  - Wishes CWA would provide digital images with the specific chapter title as it is hard to create these from scratch and have it look uniform
3. In terms of your CWA booking platform, have you been using Book2Go?
  - Yes
    - a. Is Book2Go an effective platform for your chapter?
      - Want a bit more functionality in the scheduling aspect
      - In order to become a pilot or passenger you have to apply on a site which sends contact info over to a volunteer, transferred to a spreadsheet, and then another form, then they have to reach out to the person and their on a list to be invited, and then transfer over to Book2Go
        - Feels that a lot of this should be automated/it is excessive
      - Wants to be able to do this within their own website (embedded) some type of plug-in, because people are trusting
    - b. Are there changes you would like made or a different platform you believe would work better?
      - Passengers being able to create profiles and schedule own rides would be useful

- Currently pilots post availability, and then manually have to go to a spreadsheet in order to contact passengers for rides, and as a volunteer trying to coordinate these rides is difficult
  - Currently have about 3 rides per day
  - If pilots/passengers could individually coordinate that would be easier
  - Someone also has to coordinate pilots being approved
  - Self service profile creation and scheduling on squarespace is \$15 a month, would be willing to pay \$5-10 a month for something that fits better with role based access (currently hard to delegate functionality without giving people too much power)
4. Are there a lot of integration between platforms or do you think more is needed?
- The CWA page for this chapter is located within the fnrt website
  - Anything people put into the website is then shifted over to MailChimp
  - Want to maintain some level of privacy from CWA international, doesn't believe that all types of information should be shared
  - More scheduling integration would be helpful
    - Having some sort of plugin as opposed to having Book2Go on a WordPress site could be beneficial
  - MailChimp here is currently used as a CRM
  - SquareSpace is emerging with some CRM capabilities (email marketing, storing functions, more breadth)
  - Using own sites allows them to reach a broader audience
  - Would be willing to share some data with CWA
  - More social features/branding would be nice

### *Affiliate C*

1. You noted that you do not use WordPress as your website platform, do you have a website presence somewhere, and where is that located (is it the same place you do donations/fundraising)?
  - Based out of a nonprofit senior services organization that has a variety of amenities and options for citizens aged 60+
  - Uses logos from the international site as branding on a separate CWA page on this organization site nwdss.org
  - Happy to have their own page and have it linked back to the international to follow and connect there
  - Felt restricted on the WordPress site, and found more freedom using their own site and helped with
2. You noted that you use Google Calendar for booking, and that you will be trying to use Book2Go this Spring, have you gotten anywhere with this yet, and could you tell us a little more about it?
  - Originally Book2Go was made with a facility approach in mind, so didn't work well for their organization
  - Now there were some edits made so pilots can book their own rides based on location
  - Some problems with time zones, so when they book rides it goes to the next day and they have to go through to manually change it

- If a rider could book their own rides this would be nice, because then regulars could go in and schedule their own rides
    - Now they have to call and have a faculty member schedule
    - Or a pilot knows someone needs a ride and they schedule it
3. Are there a lot of integration between the platforms you use or do you think more is needed?
    - Currently no integration between the website, Book2Go and operations of budgets
    - Also use Google Grants email through the nonprofit
  4. Where are common IT problems occurring, especially in your chapter's start up process? Are there any particularly outside of booking?
    - Google environment where everything is saved, and pulling things from here works well
    - Start up with Google Workspace was good
  5. If CWA International were to hand a new chapter an IT startup guide that outlines detailed instructions on how to set up their IT platforms, do you think it would be well received in helping start a chapter?
    - "Immensely"
    - The Hood was very useful to get idea of best practices
      - Community very good at responding
    - How to manual coming from CWA at the beginning would be very useful
  6. Is there anything else you would like to talk about or want us to know?
    - More support on marketing end of things
    - National manual on the logo wasn't super helpful
    - Having a template for newsletter/brochure/logo could be useful
    - Ideas for better ways to recruit passengers, pilots, etc.
    - The Hood is a nice implement but needs more organization, should be more structured as the org grows

### ***Affiliate D***

1. In terms of your CWA affiliate website, you shared that you do use WordPress and it is maintained by an outside party, is this something you pay for? How does it work for you?
  - Works under partner org leader, who manages the website for all the affiliates
    - Can update the site, but not often necessary
2. You commented on your Book2Go use in your original survey, could you expand a little about what you like/dislike about this service, and what you may want out of it?
  - Started off using Signup Genius, which worked but wasn't great
  - Wanted to switch to Book2Go to be more aligned with Denmark, but has a list of things that could be improved (appreciate Christian and he's been great with helping)
    - Copious emails coming from app
    - After creating a ride cant go in and edit, have to delete and remake and then everyone gets an email
    - If ride runs less time, can't change in system so has to keep things in a separate database
    - Can't add pilots through the system as a coordinator, pilots have to do it themself
    - Can't book multiple days at once, have to do it one by one

- There's a glitch, where if you click the date you want to book a ride it automatically goes back one day
  - Can't track training sessions for the pilots
    - Created a training schedule off someone's address, difficulty logging training if more people show up than bikes are available
  - Can't add pilots all at once, have to add 1 by 1 for every home they have, and have to type in the full email address every time, it won't autofill for all the pilots in the system
  - Many members confused when booking a ride between the calendar and book a ride, but book a ride is with practice sessions, when they SHOULD be using the calendar
  - Aside from her, the whole group of people working there are seniors. Its intuitive for her, but not necessarily for other seniors
  - Positive feedback from committee
    - They like how you can insert photos of home in system so a new pilot can see where they're going and get details
    - Her details are readily available
    - Like that its aligned with Denmark, hope it improves for their purposes
3. Are there a lot of integration between the platforms you use, or do you think more is needed?
- Uses Google Drive and Book2Go primarily
  - Drive stores files and information and has a database
  - Was hoping Book2Go would keep track of the rides and hours for them but this functionality isn't present yet
4. Where are common IT problems occurring, especially in your chapter's start up process?
- None
5. What are some improvements/goals you would like to see within the CWA technological landscape?
- Book2Go flexibility for the coordinator
    - It's made so the coordinator doesn't have to do a lot of the work and its delegated to pilots, she wishes she could just go in and do it because it's more work to teach 25 odd volunteers how to use it, and then hard when she reaches out to people to sign up for things and they just dont do it
6. If CWA International were to hand a new chapter an IT startup guide that outlines detailed instructions on how to set up their IT platforms, do you think it would be well received or face push back?
- They would LOVE it. Any help for IT would be very beneficial because if you don't know what you're doing it's very frustrating

**APPENDIX E: INTEGRATION DASHBOARD INFORMATION**

| Platform | Pros | Cons |
|----------|------|------|
|----------|------|------|



|                             |   |  |
|-----------------------------|---|--|
| <p>1. Zapier</p>            | <ul style="list-style-type: none"> <li>• Works across the world</li> <li>• SSO Options</li> <li>• Shared workspaces and advanced Admin permissions</li> <li>• Customizable Workflows</li> <li>• Intense Data Security</li> <li>• Supports wide range (2,000+ applications) of applications and allows users to create application integrations</li> <li>• Easy for non-technical users</li> </ul>   | <ul style="list-style-type: none"> <li>• Limitations to what can be customized without coding</li> <li>• Dependent on third-party applications</li> <li>• Zap limits (dependent on pricing plan)</li> <li>• Expensive pricing for larger organizations</li> </ul>                    |
| <p>2. Okta</p>              | <ul style="list-style-type: none"> <li>• Simple SSO</li> <li>• Easy user collaboration</li> <li>• Advanced security</li> <li>• Helps maintain GDPR compliance</li> <li>• User-friendly</li> <li>• Excellent customer support</li> </ul>   | <ul style="list-style-type: none"> <li>• Can be pricey</li> <li>• Difficult to customize</li> <li>• Can be overwhelming when starting out</li> <li>• Can have performance issues</li> <li>• Not as useful for an application dashboard (more useful for security and SSO)</li> </ul> |
| <p>3. Make (Integromat)</p> | <ul style="list-style-type: none"> <li>• Company-wide SSO</li> <li>• Thousands of automation templates</li> <li>• 1500 Applications readily available</li> <li>• Can connect to any service with an API</li> <li>• Multiple hosting options (EU or US)</li> <li>• Secure and safe data encryption</li> <li>• Customization without the need for coding</li> <li>• User-friendly</li> <li>• Generally affordable</li> <li>• Accessible around the world</li> </ul> | <ul style="list-style-type: none"> <li>• Limited customer support</li> <li>• Can be slower with larger databases/complex workflows</li> </ul>  |
| <p>4. NeonCRM</p>           | <ul style="list-style-type: none"> <li>• Designed for NGOs</li> </ul>   | <ul style="list-style-type: none"> <li>• Steep learning curve</li> </ul>   |

|            |   |  |
|------------|---|--|
|            | <ul style="list-style-type: none"> <li>• CRM with attached application dashboard</li> <li>• Highly customizable</li> <li>• Accessible for many regions</li> <li>• Provides a SSO feature</li> <li>• Affordable for NGOs</li> <li>• Lots of integration and comprehensive tools</li> </ul>                             | <ul style="list-style-type: none"> <li>• Not all features available internationally</li> <li>• Reporting limitations</li> </ul>  |
| 5. Kindful | <ul style="list-style-type: none"> <li>• CRM with dashboard created for NGOs</li> <li>• Easy to use and navigate</li> <li>• Wide range of features</li> <li>• Customizable by organizational needs</li> <li>• Easy reporting</li> <li>• Several 3rd party integrations</li> <li>• Usable outside of the US</li> </ul> | <ul style="list-style-type: none"> <li>• Pricier option</li> <li>• Not suitable for complex customization</li> <li>• Limited function outside of the US</li> <li>• Limited event fundraising capabilities</li> </ul> |

Figure 20: Table listing different integration dashboards followed by the pros and cons of particular services

**APPENDIX F: INTEGRATION DASHBOARD PACKAGE BREAKDOWN**

Description of the different packages and the features they entail for each dashboard service.

| Zapier                                 |  |  |
|--|--|--|
| Professional                           | Team                                   | Company                                |
| kr. 341.68 /month, billed annually     | kr. 2,782.22 /month, billed annually   | kr. 5,571.41 /month, billed annually   |
| 2K tasks/month                         | 50K tasks/month                        | 100K tasks/month                       |
| Unlimited Zaps                         | Unlimited Zaps                         | Unlimited Zaps                         |
| 2 min update time                      | 1 min update time                      | 1 min update time                      |
| Multi-step Zaps                        | Multi-step Zaps                        | Multi-step Zaps                        |
| No-code editor                         | No-code editor                         | No-code editor                         |
| Drafts                                 | Drafts                                 | Drafts                                 |
| Copy & paste steps                     | Copy & paste steps                     | Copy & paste steps                     |
| Duplicate & reorder steps              | Duplicate & reorder steps              | Duplicate & reorder steps              |
| Transfer (beta)                        | Transfer (beta)                        | Transfer (beta)                        |
| Subfolders                             | Subfolders                             | Subfolders                             |
| <a href="#">Unlimited premium apps</a> | <a href="#">Unlimited premium apps</a> | <a href="#">Unlimited premium apps</a> |
| Filters                                | Filters                                | Filters                                |
| Formatter steps                        | Formatter steps                        | Formatter steps                        |
| Version History                        | Version History                        | Version History                        |
| Version Rollback                       | Version Rollback                       | Version Rollback                       |
| Connections via Webhooks               | Connections via Webhooks               | Connections via Webhooks               |
| Duplicate & reorder Paths              | Duplicate & reorder Paths              | Duplicate & reorder Paths              |
| Custom logic with paths                | Custom logic with paths                | Custom logic with paths                |
| Autoreplay                             | Autoreplay                             | Autoreplay                             |
| Custom Error Notifications             | Custom Error Notifications             | Custom Error Notifications             |
|  | Export All Zaps                        | Export All Zaps                        |
|  | Unlimited users                        | Unlimited users                        |
|  | Folder permissions                     | Folder permissions                     |
|  | Premier support                        | Premier support                        |
|  | Shared app connections                 | Shared app connections                 |
|  | Shared workspace                       | Shared workspace                       |
|  | Audit Log                              | Audit Log                              |
|  | Owner access                           | Owner access                           |
|  |  | Per-Zap Autoreplay                     |
|  |  | Error Ratio Settings                   |
|  |  | Advanced admin permissions             |
|  |  | User provisioning (SCIM)               |
|  |  | App restrictions                       |
|  |  | SAML single sign-on (SSO)              |
|  |  | Custom data retention                  |
|  |  | Account consolidation                  |
|  |  | Super Admin                            |
|  |  | Live chat                              |

Figure 21: Table demonstrating the different packages and corresponding features for Zapier

| Kindful  |   | Okta   |
|--|---|--|
| 5,001 - 15,000 Contacts  | 15,001-25,000 Contacts  | Auth0 for Nonprofits   |
| \$349 /month   | \$459 /month  | Contact Salesperson for pricing  |
| For organizations with 5,001-15,000 Contacts within the organization | For organizations with 15,001-25,000 Contacts within the organization | Use Auth0 to reduce security and compliance risks, improve your donor and volunteer experience, and enhance your technology investments - all with a simple login box. |
| <a href="#">All Kindful Features</a>                                 | <a href="#">All Kindful Features</a>                                  | Unlimited External Users   |
| Unlimited Users  | Unlimited Users   | Unlimited Employees  |
| Unlimited Donation & Crowdfunding Pages                              | Unlimited Donation & Crowdfunding Pages                               | 5,000 Machine to Machine Authentication  |
| No Additional Transaction Fees                                       | No Additional Transaction Fees  | <a href="#">M2M Add-on</a>   |
| <a href="#">40+ Apps &amp; Integrations</a>                          | <a href="#">40+ Apps &amp; Integrations</a>                           | Unlimited Social Connections   |
| Unlimited Users  | Unlimited Users   | Custom Social Connections  |
| Unlimited Donations and Crowdfunding Pages                           | Unlimited Donations and Crowdfunding Pages                            | <a href="#">Auth0 Database Connection</a>  |
| Other information available upon scheduling a demo                   | Other information available when scheduling a demo                    | <a href="#">External Database</a>  |
|  |   | Cross APP SSO  |
|  |   | <a href="#">Enterprise Connections</a>   |
|  |   | Unlimited Organizations  |
|  |   | Home Realm Discovery   |
|  |   | Long Lived Sessions  |

Figure 22: Table demonstrating the different packages and corresponding features for Kindful and Okta

| NeonCRM  |   |
|--|---|
| Essentials (Revenue < \$1M)  | Impact (Revenue < \$5M)   |
| \$99 /month  | \$199 /month  |
| Essentials provides all the tools you need to efficiently manage your fundraising database so you can continue to grow | Impact includes additional tools to automate operations, manage events & volunteers, and additional integrations and open API options |
| Contact management   | Contact management  |
| Automated receipting   | Automated receipting  |
| Constituent login portal   | Constituent login portal  |
| Household & relationship tracking  | Household & relationship tracking   |
| Task Management  | Task Management   |
| Letter creation  | Letter creation   |
| File storage   | File storage  |
| Academy Access   | Academy Access  |
| Neon One   | Neon One  |
| Unlimited Email Customer Support   | Unlimited Email Customer Support  |
| Daily back-ups   | Daily back-ups  |
| Grant Tracking   | Grant Tracking  |
| Email and Marketing Automation   | Email and Marketing Automation  |
| Moves Management   | Moves Management  |
| Executive Financial Reports  | Executive Financial Reports   |
| Customizable queries   | Customizable queries  |
| Pre-built and Custom Reports   | Pre-built and Custom Reports  |
| Custom SSL   | Custom SSL  |
| Surveys  | Surveys   |
| Tributes   | Tributes  |
| Peer-to-peer fundraising   | Peer-to-peer fundraising  |
|  | QuickBooks integration  |
|  | Volunteer Management  |
|  | Events Management   |
|  | Open API  |
|  | 15 Active Workflows   |

Figure 23: Table demonstrating the different packages and corresponding features for NeonCRM

| Make (Integromat)   |   |   |
|---|---|---|
| Pro   | Teams   | Enterprise  |
| \$16 /month, billed annually                                      | \$29 /month, billed annually                                    | Sales Estimate Dependent  |
| For SMBs, startups, and automation pros who want to scale quickly | For teams and agencies to collaborate and manage workflows      | For organizations seeking enterprise-grade features & support   |
| No-code workflow builder  | No-code workflow builder  | No-code workflow builder  |
| 1000+ apps  | 1000+ apps  | 1000+ apps  |
| Custom apps   | Custom apps   | Custom apps   |
| Unlimited users   | Unlimited users   | Unlimited users   |
| Two-factor authentication   | Two-factor authentication                                       | Two-factor authentication                                       |
| Parallel scenario execution                                       | Parallel scenario execution                                     | Parallel scenario execution                                     |
| Real-time execution monitoring                                    | Real-time execution monitoring                                  | Real-time execution monitoring                                  |
| Unlimited number of active scenarios                              | Unlimited number of active scenarios                            | Unlimited number of active scenarios                            |
| Minimum 1 minute interval between scheduled scenario executions   | Minimum 1 minute interval between scheduled scenario executions | Minimum 1 minute interval between scheduled scenario executions |
| Access to 300+ Make API endpoints                                 | Access to 300+ Make API endpoints                               | Access to 300+ Make API endpoints                               |
| Full-text execution log search                                    | Full-text execution log search                                  | Full-text execution log search                                  |
| Operations usage flexibility                                      | Operations usage flexibility                                    | Operations usage flexibility                                    |
| Custom variables  | Custom variables  | Custom variables  |
| Priority scenario execution                                       | Priority scenario execution                                     | Priority scenario execution                                     |
| Scenario Inputs   | Scenario Inputs   | Scenario Inputs   |
| High priority scenario execution                                  | High priority scenario execution                                | High priority scenario execution                                |
| Teams and team roles  | Teams and team roles  | Teams and team roles  |
| Create and share scenario templates                               | Create and share scenario templates                             | Create and share scenario templates                             |
|   | High priority scenario execution                                | High priority scenario execution                                |
|   | Teams and team roles  | Teams and team roles  |
|   | Create and share scenario templates                             | Create and share scenario templates                             |
|   |   | Access to enterprise apps                                       |
|   |   | Information security compliance support                         |
|   |   | Company single sign-on (SSO) access control                     |
|   |   | Operations overage protection                                   |
|   |   | Two-factor authentication                                       |
|   |   | Custom functions  |
|   |   | Dedicated customer success manager                              |
|   |   | 24/7 Customer support and defined response times                |

Figure 24: Table demonstrating the different packages and corresponding features for Make (Integromat)