Encouraging Place-Based Giving in Merton

An Interactive Qualifying Project
Submitted to the Faculty of
WORCESTER POLYTECHNIC INSTITUTE
in partial fulfillment of the requirements for the degree of Bachelor of Science

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1.0 Introduction

The London borough of Merton is characterized by the stark socio-economic divide between its deprived eastern half and affluent western half. Compared to the western half of the borough, eastern Merton faces significantly higher percentages of workers in insecure occupations and children living in poverty (The Merton Story, 2021). In response to the income inequality within the borough, the Merton Council has delivered essential services to address the needs of the diverse Merton community. However, council governments across London have slashed social programs due to budget cuts. Specifically, the most recent budget for borough councils will create a £500 million budget shortfall compared to the cost of necessary government services *(London Councils, 2024, pg.1)*. These budget cuts have increased the gap between government services and community needs. Consequently, there has been greater reliance on placed-based giving schemes (PBGS) to address local issues by leveraging community assets (Walker, 2018).

Merton Connected is a charitable organization in the London Borough of Merton, that seeks to improve the community by providing a range of support and services to over 1000 local Voluntary, Community Social Enterprise (VCSE) organizations. One of Merton Connected's initiatives is Merton Giving, a PBGS in Merton that provides grant funding to numerous VCSEs. Merton Giving is a part of a larger organization, London's Giving which helps to promote PBGS in the city of London. The combination of recent government funding cuts and Merton's socio-economic divide has applied pressure on Merton Giving to garner enough resources to provide support to the community. As a result, the optimization of current fundraising strategies and potential implementation of new fundraising strategies are necessary, as donations play a major role in securing these resources, which are growing in demand. Merton Connected partnered with Worcester Polytechnic Institute (WPI) to identify how they can encourage donations to PBGSs.

The goal of this project is to understand the factors that influence and hinder donations to PBGSs in Merton and the measures that can be taken to increase donations to PBGSs. We will achieve this goal by accomplishing the tasks associated with the five main objectives that we identified:

Objective 1: Determine current and best practices in the development and implementation of Placed-Based Giving schemes in Merton and other boroughs in London.

Objective 2: Assess stakeholders' awareness, perceptions, and attitudes regarding the PBG schemes in Merton.

Objective 3: Identify what drives members of the local community and businesses to support or not support PBG in Merton.

Objective 4: Create a communication framework outlining the most effective messages, channels, and engagement strategies to encourage PBG.

Objective 5: Recommend strategies Merton Connected might use to promote donor engagement, enhance community awareness, and optimize fundraising approaches.

We will conduct interviews with members of Merton Connected, Merton Giving, London's Giving, various PBGSs, the Merton Borough Council, VCSE organizations, and corporate partners. These interviews will allow us to further understand how these organizations operate as well as how they impact their respective communities. We will also administer surveys and conduct follow-up interviews with current and previous donors to Merton Connected and Merton Giving to identify the different motivations for donating.

2.0 Background

This section provides background information to contextualize the objectives of this project. We discuss: the London Borough of Merton; the Merton Borough Council; Voluntary, Community Social Enterprise (VCSE) Organizations; Merton Connected; and Place-Based Giving Schemes (PBGSs).

2.1 The Borough of Merton

In 1965, the previous boroughs of Mitchem, Wimbledon, Merton, and Morden merged to create the current borough of Merton. Today, Merton extends over 14.7 square miles in southwest London (Figure 1), has a population of over 215,000 people, and includes 80,000 households and 7,000 businesses (About Merton, n.d.). Merton's population growth rate of 7.8% between 2011 and 2021 is similar to London's overall growth of 7.7% during this time and marginally higher than the 6.6% population growth in England during this decade (*Statistics and Census Information*, n.d.).

Figure 1: London Borough of Merton (highlighted in dark purple) (About Merton, n.d.)

There are five town centers located within Merton: Wimbledon, Mitcham, Morden, Raynes Park, and Collier Wood. Throughout these centers, Merton hosts a diverse range of

businesses, ranging from small storefronts to prominent establishments such as the All England Lawn Tennis Club, which draws 500,000 visitors annually for the Wimbledon Championships.

While Merton has a rich history, continued population growth, and a thriving business sector, there is a stark socio-economic divide between the deprived eastern and affluent western half of the borough (About Merton, n.d.). This socio-economic divide is visible in the income, education, and occupations of the residents in each half of the borough. For example, figure 2 shows that west Merton has higher percentages of workers in insecure occupations and children living in poverty (The Merton Story, 2021).
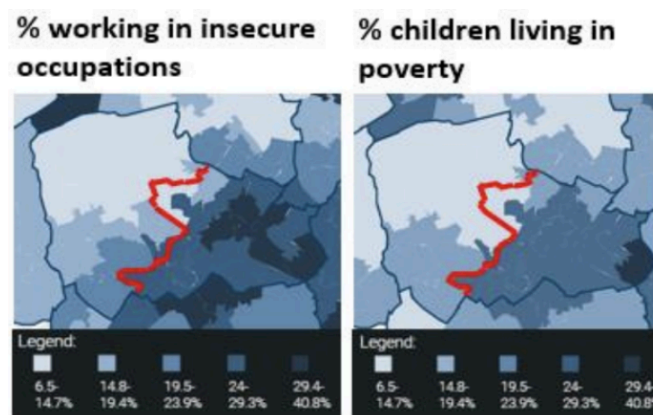
Figure 2: Discrepancies in Wealth within Merton (The Merton Story, 2021)

In addition to the socio-economic divide in Merton, there is a stark geographical divide between the western and eastern half of the borough in terms of ethnicity, nationality, language, and religion. A significantly higher percentage of Black, Asian, and Minority Ethnic (BAME) groups live in the eastern half of the borough, whereas a much larger proportion of White ethnic groups live in the western half (Figure 3). According to the Office of National Statistics (ONS) census, Merton's racial makeup is 60.2% White, 18.6% Asian, 10.6% Black, and 10.5% other or mixed ethnic groups (*Office of National Statistics, 2023*).
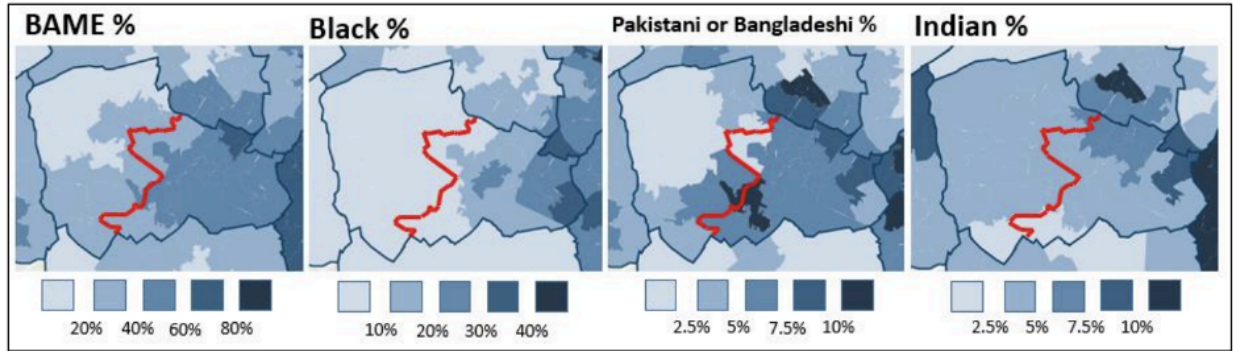
Figure 3: Minority Groups within Merton (The Merton Story, 2021)

The population of Merton is also religiously diverse. Approximately 47% of the population identifies as Christian and 10.1% as Muslim (*Statistics and Census Information*, n.d.). Merton is also home to the Baitul Futuh Mosque, which is one of the largest mosques in Europe and the largest in the United Kingdom. Notwithstanding this religious diversity, the percentage of the population not affiliated with any religion increased from 20.6% in 2011 to 28% in 2021.

2.2 The Merton London Borough Council

The Merton Council plays a pivotal role in shaping Merton's public policy and delivers essential services to address the needs of the diverse Merton community. The Merton Council functions as the borough's governing body and is elected every four years. The borough is divided into 20 electoral wards, represented by 57 council members from various political parties, including the Labour Party, Liberal Democratic Party, Conservative Party, Merton Park Independent Residents Party, and Independent Party. The election results reflect the socio-economic divide in the borough. Currently, the Labour Party holds a substantial majority within the council and controls 30 of the 57 available seats *(Services, 2025b)*. The Labour Party dominates in the eastern half of the borough, while the western half of Merton voted disproportionately for the Conservative Party and the Liberal Democratic Party (Figure 4) (London Borough Merton, n.d.).
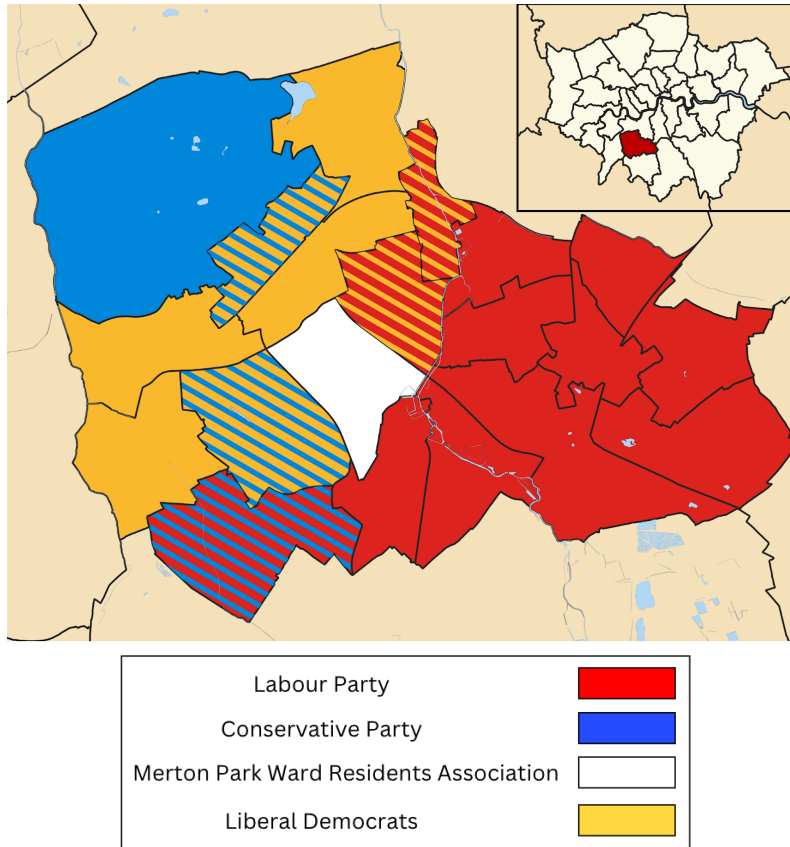
Figure 4: Merton Election Results by Party. (London Borough of Merton, 2025)

Merton's municipal government is led by a mayor and a cabinet. In May of each calendar year, the council elects one of the councilors to serve as the mayor. The role of the mayor focuses on overseeing the council members. One of the first responsibilities of the Mayor of Merton is selecting who will serve in the ten cabinet positions (Table 1) (*Mayor of Merton : About the Mayor | Merton Council*, n.d.). These positions comprise nine councilors and an executive leader, each responsible for overseeing a major service within the borough *(Services, 2025a)*. Each position helps to improve the lives of the residents of Merton residents with no regard to economic standing, ethnicity, nationality, language, or religion.

Table 1: Merton Cabinet Members and Cabinet Positions (Services, 2025a)

Cabinet Member	Cabinet Position
Ross Garrod	Leader of Council
Usaama Kaweesa	Children's Services
Edith Macauley, MBE	Enforcement and Community Safety
Billy Christie	Finance and Corporate Services
Peter McCabe	Health and Social Care
Andrew Judge	Housing and Sustainable Development
Caroline Cooper-Marbiah	Sport and Heritage
Sally Kenny	Jobs, Skills, and Education
Stephen Alambritis, MBE	Transport and Cleaner Streets
Eleanor Stringer	Civic Pride and Climate Change

Council members in Merton play a crucial role in shaping public policy for the borough. Elected councilors develop policies to support residents, focusing on key areas such as public transportation, roadwork, waste management, health and social care, elderly programs, community safety, public education, and housing. Once policies are approved through a council vote, they are implemented and overseen by designated cabinet members. The borough's day-to-day services are then carried out by over 2,000 council employees and officers, who address community concerns and ensure smooth operations.

Alongside the day-to-day services that the council oversees for the borough, the Merton London Borough Council implements a long-term plan focusing on policy goals and strategies for the future. The most recent plan, "2023-2026 Council Plan: Building A Better Merton Together", emphasizes the important initiatives the council wishes to support (Figure 5). One of the major causes that the council plan hopes to strengthen is the sustainable future for the residents of the borough. Many of the efforts to create a sustainable future in Merton focus on improving the standards of living for all the residents of the community. The initiatives that hope to achieve the goals of their plan, both those already enacted and those planned for the future,

include the development of more affordable housing, higher quality of housing, improved air quality across the borough, and equal access to local health services (*Building a Better Merton Together*, n.d.). These initiatives aim to decrease the socio-economic discrepancies between the eastern and western half of the borough.

Figure 5: Objectives of "2023-2026 Council Plan: Building A Better Merton Together" Project
(Building a Better Merton Together, n.d.)

One of the primary ways the Merton Council serves the community is through the Local Welfare Support Scheme (LWSS). The purpose of LWSS is to support the residents who are in severe financial difficulties. The groups that LWSS typically supports are residents who have serious physical or mental illness, children with major health concerns, people at risk of homelessness, pension-age residents with support needs, and those fleeing domestic violence. The objective of this scheme is to provide short-term support for the residents who find themselves in these situations. The justification for the strict requirements necessary for the Merton Council to help its residents is due to the limited available funding. This is a problem that is not just confined to Merton with many boroughs throughout London and all of England feeling the impacts of continued cuts to government funding for these services. The limitations of government support for the people emphasize the vital role that Voluntary, Community, and

Social Enterprise (VCSE) organizations and Merton Connected play in supporting and serving the community, ensuring that essential services continue to reach those in need.

2.3 VCSE Organizations

Voluntary, Community, and Social Enterprise (VCSE) organizations are non-profit groups focused on inspiring social impact. These organizations, which are often independent of governmental bodies, include small local community groups, local charities, foundations, trusts, social enterprises, and cooperatives, all driven by social, environmental, or cultural objectives. There are currently 658 VCSE organizations in Merton *(Merton Council, n.d.)*.

In Merton, VCSEs work closely with the local council to provide key services to residents. One aspect of this partnership is the Merton Compact, which is a formal agreement between the Merton Council and VCSEs. The Merton Compact is designed to ensure that the public sector and non-profit organizations can work together effectively to deliver high-quality services to residents *(Merton Council n.d.)*. Through this partnership, Merton Council provides VCSEs with financial aid, strategic guidance, and access to facilities. Additionally, the council supports VCSEs by offering training and resources to help these organizations improve their fundraising capabilities and business operations. The effectiveness of this collaboration depends on public funding, which has fluctuated over time. Many voluntary and community organizations relied heavily on grants and funding from central and local governments. However, since 2010, austerity measures have resulted in budget reductions. Between 2010 and 2020, local authorities across the UK experienced a significant decline in spending power. Central government's primary funding fell by more than 50% which forced many local councils to make budget cuts *(House of Lords Library, 2024)*. Although some funding gaps have been partially closed by increases in council tax revenue, these measures have often not been enough to fully compensate for the financial shortfalls. As a result, many local governments, including Merton Council, have had to cut funding for certain VCSE services, leaving these organizations to seek alternative sources of revenue *(Local Government Association 2023)*.

Budget cuts have impacted VCSEs in a variety of ways. Many VCSEs have sought alternative sources of income, including corporate partnerships, crowdfunding, community funding, and social investment *(House of Lords Library 2024)*. Some organizations have also expanded their services to attract private-sector funding or launched social enterprises to

generate comparable revenue. Furthermore, budget cutbacks have led VCSEs to digitize their processes, particularly by utilizing online fundraising platforms, virtual service delivery, and digital marketing *(Merton Council n.d.)*. These measures have helped organizations reach wider audiences at a lower cost. Additionally, many organizations have become more dependent on unpaid volunteers as well as collaborating with other organizations to reduce overall costs as a result of these budget reductions.

2.4 Merton Connected

Launched in 1984, Merton Connected is a charitable organization that supports local VCSE organizations that provide social services to benefit the borough's residents *(Merton Connected, 2021)*.

Merton Connected's mission is driven by three key objectives, across seven areas of engagement (Figure 6). Their first objective is to promote charitable causes that benefit the public in Merton, focusing on the "... advancement of education, the promotion of health, and the relief of poverty, distress, and sickness" *(MVSC, n.d.)*. Merton Connected has made progress towards this objective by directly providing services to support the health and well-being of residents by delivering social prescribing and hosting Healthwatch Merton *(Merton Connected, 2021)*, an organization that gathers feedback from residents' experiences with local health and social care services to better meet community needs *(Healthwatch Merton, 2023)*. Additionally, Merton Connected coordinates the Home Library Service program, which provides books and audio material to residents who are unable to access a library *(Merton Connected, 2021)*. Lastly, Merton Connected helps operate the Merton Community Hub connecting residents to the support they need within the community.

Figure 6: Areas Engaged (Merton Connected, 2021)

Another objective of Merton Connected aims to "promote, organize, and facilitate cooperation and working partnership between third-sector, statutory, and other relevant bodies" *(MVSC, n.d.)*. For example, Merton Connected helps VCSE organizations register with regulatory bodies, ensuring legal recognition, which allows access to more funding opportunities, an amplified voice in influencing local policies, and an enhanced credibility for these VCSEs *(MVSC FS22, n.d.)*.

Lastly, Merton Connected aims to strengthen local third-sector organizations by providing them with the "necessary support, information, and services to enable them to pursue or contribute to any charitable purpose" *(MVSC, n.d.)*. To accomplish this goal Merton Connected has provided grant funding to numerous VCSEs through their Merton Giving Fund. Besides financial support, Merton Connected also promotes and matches volunteer opportunities from VCSE organizations with residents interested in meaningful work that gives back to the community. A diverse set of volunteering opportunities are offered that range from safeguarding to employee, and youth volunteering, ensuring that every resident can contribute some time to make a positive difference *(Merton Connected, 2021)*.

2.5 Place-Based Giving Schemes (PBGSs)

This section provides a general overview of PBGSs and the strategies they use to encourage donations. Case studies of other boroughs' PBGSs reveal that strategies vary across boroughs, as they intend to target different types of donors and address issues important to the

local community. Lastly, we highlight some of the PBG strategies that Merton Giving implements and compare Merton Giving to PBGSs in other boroughs.

2.5.1 Defining and Characterizing PBGSs

While the term "Placed-Based Giving Schemes" can describe a variety of charitable endeavors, our project will define PBGSs as programs that leverage the assets of a community to address issues that pertain to the constituents of that community *(Walker, 2018)*. The focus on a particular community is significantly different from globalized charitable foundations, which collect resources from around the world to benefit a particular cause *(Kruger, 2017 p.47)*. Since PBGSs operate within the context of a specific community, there is not a single issue on which all PBGSs are focused. Instead, PBGSs use local knowledge to target problems based on evidence drawn from the community *(London Funders, 2017 p. 11)*.

The necessity for PBGSs lies in the gap between the need for services within communities, and those provided by the government. In 2013, the gap between the services demanded by constituents but not provided by local governments in the U.K. was estimated to be worth £14.4 billion *(Randle et. al., pg. 63)*. Furthermore, this discrepancy has increased since this initial report due to massive cuts to borough council governments since this date. According to London Councils, a collective organization representing the borough councils of London, the Local Government Finance Settlement for 2025-2026 is estimated to create a £500 million budget shortfall compared to the cost of necessary government services *(London Councils, 2024, pg.1)*. Making matters worse, the small number of social programs that are in effect in London often exclude those communities facing the highest level of deprivation *(Walker, 2018 pg. 7)*. The widening gap between services needed by communities in London and those provided by borough councils, combined with the massive budget cuts boroughs are facing, highlights the necessity for PBGSs.

While most PBGSs collect financial donations, a defining characteristic of PBGSs is their use of non-financial contributions, including volunteers and in-kind contributions (*Walker, 2018 pg. 12)*. According to London Giving, an organization that supports PBGSs in London, PBGSs seek to harness "... time, money, skills, or connections" from residents of the city (London Giving, n.d., p.2). Volunteerism is at the heart of PBGSs. While schemes use volunteers in a variety of ways, the impact of volunteerism on PBGSs was estimated to be £808,000 between 2018 and 2019 *(London's Giving. n.d.-a)*. The financial impact of volunteers highlights their

necessity within PBGSs, and that non-financial contributions are a defining characteristic of PBGSs.

PBGSs have had a tremendous impact on the communities that they serve. According to London's Giving, PBGSs raised £4.49 million between 2017 and 2019, distributed £4.81 million in grants, and collected £387,466 in in-kind support *(London Giving, n.d.)*. Notably, PBGSs were instrumental in supplying relief to constituents during the COVID-19 pandemic. According to London's Giving, during the height of the pandemic and the ensuing recovery, PBGSs raised £11 million and issued £7.9 in grants, with 57% of those grants being related to pandemic relief, along with thousands of volunteering hours *(London's Giving, n.d.-a)*. The contributions from PBGSs to the community, especially during the coronavirus pandemic, highlight the efficacy of PBGSs in supplementing government service and fulfilling the needs of the community.

2.5.2 Strategies Employed by PBGSs to Encouraging Donations

To effectively address issues facing the local community, PBGSs need to accumulate resources to allocate to local charitable organizations, so they can fill in these gaps left by government services. One of the primary ways PBGS collects these resources is through donations. Strategies utilized by PBGS to encourage financial and in-kind donations vary widely across the boroughs of London. This variation stems from different boroughs' PBGs tailoring their fundraising strategies to their specific setting.

"Multiple asset boroughs", typically located in inner London, possess a great number of resources. They are located in high-wealth areas and include at least one local funder, an active Council for Voluntary Services (CVS) - infrastructure organizations that support local charities and community groups - and they have access to larger businesses and corporations *(Londonsgiving, 2020, p.14)*. These boroughs' PBGS can be more ambitious and center their strategies around targeting sizable donations from high-net-worth individuals and larger businesses. According to the London's Giving article, *City Givers Like the Personal Touch,* high-net-worth individuals in charge of large businesses have stated that a key motivation for them to donate is having this "personal touch", in which they can see the impact of their donation at a grassroots level and build relationships with beneficiaries, staff at PBGS, and other donors *(Londonsgiving, n.d.-c)*. This approach is seen with Islington Giving (Islington's PBGS), which has been able to form a sustained partnership with the Macquarie Group, a global financial

institution, that has played an integral role in the borough. This sustained partnership is the result of Islington Giving's transparency regarding where the donors' money goes and how it is making a difference in the community. The Macquarie Group has provided Islington Giving with expertise, staff engagement, and more than £750,000 in funding since 2012 *(Londonsgiving, 2020, p.14)*.

In contrast, "boroughs with greater potential", usually located in outer London, lack the kinds of resources typical in multiple-asset boroughs. Despite possessing fewer resources, a study of over 18,000 donations to London children's charities conducted by The Big Give, an online platform that enables people to donate to charitable causes, reveals that "some of London's most deprived boroughs demonstrate the highest levels of generosity" (Lake, 2021), where generosity was calculated as the proportion of mean donations to mean incomes for each borough (Lake, 2021). Boroughs with greater potential are more dependent on receiving larger numbers of smaller donations from businesses and individuals, so their strategies must be tailored to these audiences. For example, the borough of Lewisham "lacks large businesses and has few small to medium size enterprises (SMEs). However, it boasts a high proportion of micro-businesses with skills, knowledge and expertise" *(Londonsgiving, 2020, p.37)*. Lewisham Local (Lewisham's PBGS) appeals to these micro businesses through incentives, where instead of just asking businesses for donations, Lewisham Local offers rewards for donating, like access to skills-sharing workshops where businesses can learn from each other, or a discount network that gives businesses access to deals and savings they can use *(Londonsgiving, 2020, p.37)*. These micro businesses might not have extra resources to contribute to PBGS, so these incentives play a large role in encouraging them to donate. Furthermore, the London's Giving article *The Funding Network - Live Crowdfunding Tips* revealed that Hackney Giving (Hackney's PBGS) has been successful in targeting donations from individuals with crowdfunding events - gatherings where organizations pitch projects through quick-fire presentations to the general public, who then can make donations to support these initiatives in real time - with "charitable projects regularly exceeding their £6,000 funding target" *(London's Giving, n.d.-b)*.

2.5.3 Merton Giving

Merton Giving is a PBGS based in the London borough of Merton and was established as a partnership between Merton Connected and the Merton Chamber of Commerce *(Merton Chamber of Commerce, 2024)*. Merton Giving seeks to connect businesses and residents within the borough with opportunities to support local charitable causes. One way in which Merton Giving accomplishes this goal is with the Merton Giving Fund – a fundraising program that provides grants to organizations within the borough *(Merton Connected, 2021)*. Since its inception, the Merton Giving Fund has provided funding to organizations in the borough by awarding grants relating to a variety of causes including civic pride, economic resilience, and social prescribing *(Merton Giving, n.d.)*. Additionally, Merton Giving furthers its impact by recruiting volunteers and fostering community within Merton *(Merton Connected, 2021)*.

Merton Giving's approach to PBG is unique compared with other PBGSs due to the borough's divide between the affluent western side and the more deprived eastern side. This western side of Merton possesses the resources of a multiple-asset borough, as it is a high-wealth area, consisting of numerous large businesses including the All England Lawn Tennis Club, Tesco, Canon, and others. Furthermore, Merton Giving has an active CVS, namely Merton Connected, which is the trade name of the Merton Voluntary Service Council (MVSC). Merton Giving also has multiple local funders including the Wimbledon Foundation and Clarion Housing *(Londonsgiving, 2020, p.20)*. In contrast, the eastern side of Merton has characteristics of a borough with greater potential, lacking high-wealth areas and access to larger businesses. This divide indicates that Merton Giving can target donations from larger businesses and high-net-worth individuals in the West and smaller businesses and local residents in the East. This balance creates a diverse, sustainable funding base, maximizing donor support and ensuring strong community involvement across different areas of Merton.

Detailed information on Merton Giving's fundraising strategies is limited, but their website showcases some of the simple strategies they implement to connect with the local community and encourage donations. Currently, Merton Giving promotes their events, funding progress, and grant recipients on social media platforms including Instagram, X, and Facebook, receiving moderate levels of engagement. Merton Giving also recognizes individuals who have donated on their website and allows them to write an inspirational message. Furthermore, individuals who run fundraising campaigns and businesses that donate can receive separate posts

on their website, where they can tell their story and motivation to donate. Lastly, they share various fundraising ideas for people to engage in and also highlight how different donation amounts could provide support to local issues.

As mentioned previously, there have been recent government funding cuts to the borough councils, increasing the gap between government services and community needs. Consequently, there is more pressure on Merton Giving to garner enough resources to provide support to Merton's charitable organizations that can fill this widening gap. As a result, the optimization of current fundraising strategies and potential implementation of new fundraising strategies are necessary, as donations play a major role in securing these resources, which are growing in demand. To address this issue, the proposed project aims to help Merton Connected and Merton Giving identify effective strategies to enhance their fundraising efforts. The specific methods for achieving this will be outlined in the methodology section below.

3.0 Methodology

The overall goal of this project is to understand what factors influence and hinder donations to PBGSs in Merton, and what can be done to increase donations to PBGSs. We will achieve this goal by accomplishing the tasks associated with the five main objectives (Figure 1).

Objective 1: Determine current and best practices in the development and implementation of Placed-Based Giving schemes in Merton and other boroughs in London.

Objective 2: Assess stakeholders' awareness, perceptions, and attitudes regarding the PBG schemes in Merton.

Objective 3: Identify what drives members of the local community and businesses to support or not support PBG in Merton.

Objective 4: Create a communication framework outlining the most effective messages, channels, and engagement strategies to encourage PBG.

Objective 5: Recommend strategies Merton Connected might use to promote donor engagement, enhance community awareness, and optimize fundraising approaches.

Figure 1 highlights the tasks associated with each of our project objectives. Additionally, figure 2 highlights the timeline of our data collection, which will occur in London from March to May 2025. Following our data collection, we will identify the stakeholders in PBGSs, and present a cohesive report with our findings along with a series of recommendations that can optimize fundraising efforts for PBGSs in Merton.
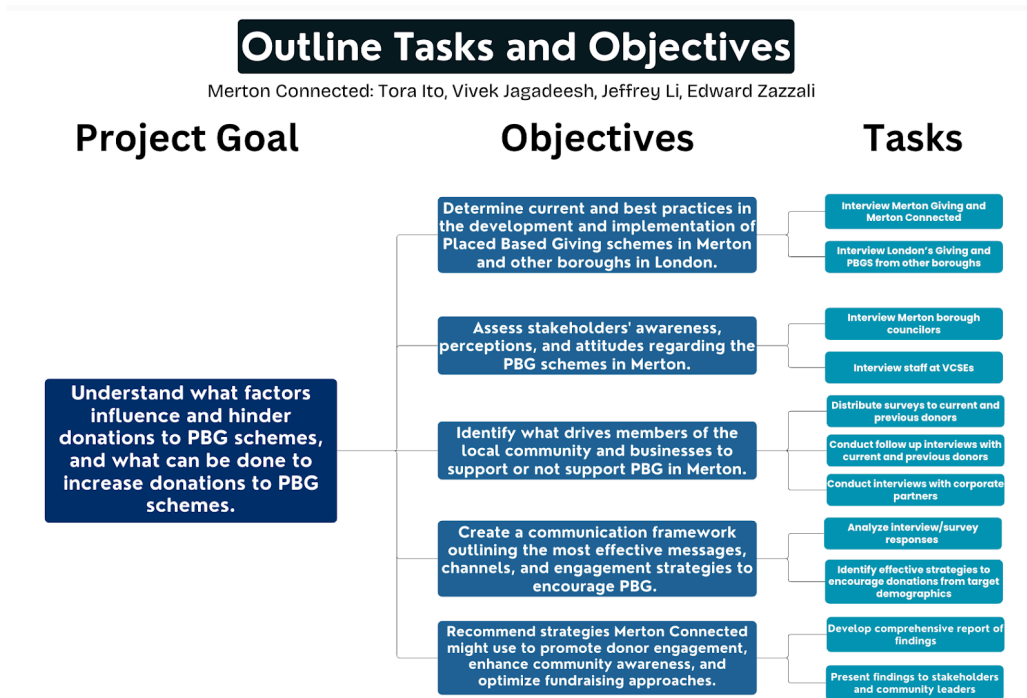

Outline Tasks and Objectives

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Project Goal

Understand what factors influence and hinder donations to PBG schemes, and what can be done to increase donations to PBG schemes.

Objectives

- Determine current and best practices in the development and implementation of Placed Based Giving schemes in Merton and other boroughs in London.
- Assess stakeholders' awareness, perceptions, and attitudes regarding the PBG schemes in Merton.
- Identify what drives members of the local community and businesses to support or not support PBG in Merton.
- Create a communication framework outlining the most effective messages, channels, and engagement strategies to encourage PBG.
- Recommend strategies Merton Connected might use to promote donor engagement, enhance community awareness, and optimize fundraising approaches.

Tasks

- Interview Merton Giving and Merton Connected
- Interview London's Giving and PBGS from other boroughs
- Interview Merton borough councilors
- Interview staff at VCSEs
- Distribute surveys to current and previous donors
- Conduct follow up interviews with current and previous donors
- Conduct interviews with corporate partners
- Analyze interview/survey responses
- Identify effective strategies to encourage donations from target demographics
- Develop comprehensive report of findings
- Present findings to stakeholders and community leaders

Figure 7: Project Goal, Objectives, and Tasks

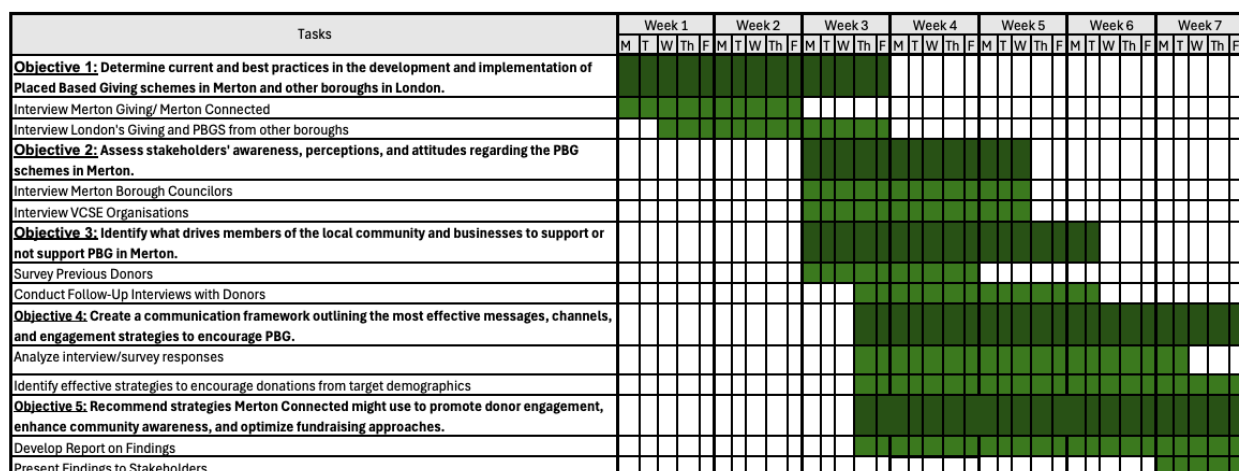| Tasks	Week 1				Week 2				Week 3				Week 4				Week 5				Week 6				Week 7			
	M	T	W	Th	F	M	T	W	Th	F	M	T	W	Th	F	M	T	W	Th	F	M	T	W	Th	F	M	T	W	Th	F
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Develop Report on Findings																														
Present Findings to Stakeholders																														

Figure 8: Gantt Chart with Preliminary Timeline in London

3.1 Objective 1: Determine Current and Best Practices in the Development and Implementation of PBGSs in Merton and Other Boroughs in London

The first objective of this project is to understand how Place-Based Giving Schemes (PBGS) are developed, refined, and sustained to serve their communities. This objective will be accomplished by (1) interviewing Merton Giving and Merton Connected and (2) interviewing staff members of London's Giving and other PBGSs in London.

3.1.1 Interview Merton Giving and Merton Connected

To better understand the current state of successful PBGSs in and outside Merton, we will conduct interviews with our project sponsor, Merton Connected. We will begin by interviewing Tony Molloy, the C.E.O. of Merton Connected, and Beau Fadahunsi, the Head of Development and Volunteering at Merton Connected. Ideally, these interviews will last approximately 30 minutes and will be in person at a location convenient for our project host. If we can not conduct these interviews in person, we will utilize Microsoft Teams or Zoom to conduct remote interviews, depending on the preferred platform of our project host. Before conducting interviews, we will develop and pre-test interview scripts in consultation with our project sponsors and advisors (Appendix B).

Through these interviews, we will learn more about the origins, development, and ongoing activities and strategies of Merton Connected and Merton Giving. Additionally, we will identify which boroughs in London have the most innovative, effective, and well-developed PBGSs and which employees of those PBGSs would be the most appropriate representatives for us to speak to. Finally, we will identify other employees that we may interview at Merton Connected, Merton Giving, London's Giving, and VCSEs in Merton to further our understanding of the current and best practices that PBGSs employ.

When conducting interviews, we aim to foster a respectful and diplomatic environment that encourages open communication. Interviews will typically be conducted in pairs to avoid overwhelming the interviewee. One team member will act as the lead interviewer, while the other will serve as the scribe, capturing key points discussed during the interview. Prior to the beginning of the interview, we will seek consent to record and provide a brief overview of our

project's purpose. When appropriate, we will use visual aids such as figures or graphics to clarify complex topics and facilitate discussion.

Following the interviews, we will review the interview notes and the recording of the interview. We will analyze the data to identify recurring themes and assess their relevance to our project objectives. Specifically, we will seek to recognize insights overlooked in our initial research. The findings from these interviews, combined with our background research, will help to create a set of guidelines for implementing best practices from PBGS to Merton Giving.

3.1.2 Interview London's Giving and PBGS from other Boroughs

Once our group finishes interviewing employees at Merton Connected and Merton Giving, we will conduct interviews with employees from London's giving and other PBGSs in London using the format outlined in section 1.1.1. Interview subjects will be selected using the results from our interviews with our project hosts. We will also consider the candidate's position, level of involvement, expertise in PBGS, and recommendations from Merton Connected, Merton Giving, and London's Giving when selecting interview subjects. Initial contact will be made via email to schedule and discuss interviews.

The key topics that we will explore in these interviews include strategies for targeting diverse communities, engaging a wide audience in PBGSs, and the challenges that PBGSs face. To optimize our limited time, we will develop tailored interview scripts for employees of London's Giving (Appendix C) and other PBGSs (Appendix D), containing both open-ended and yes/no questions to guide the conversation based on the interviewee's expertise.

3.2 Objective 2: Assess Stakeholders' Awareness, Perceptions, and Attitudes Regarding the PBGS in Merton

In this objective, we will conduct interviews with members of the Merton Borough Council, with a focus on those who influence policy relating to PBGSs and fundraising schemes in Merton (Appendix E). The Merton Council plays a pivotal role in providing services that impact the well-being of its residents. In the past, the council has started initiatives to improve access to housing and address economic disparities. Through these interviews, we will gain perspectives from those who have the financial and political means to bring about these changes in the borough.

Following our interviews with the Merton Council, we will interview VCSEs to understand how decisions made by the council impact these organizations. By interviewing employees at select VCSEs across Merton and the UK as a whole, we can further understand how these organizations operate and how they impact their respective communities (Appendix F). Additionally, we will use these interviews to bolster our understanding of the relationship between VCSE organizations, the Merton Council, and Merton Connected/Giving. These interviews will follow the format in section 1.1.1.

3.3 Objective 3: Identifying What Drives Members of the Local Community and Businesses to Support or Not Support PBG in Merton

The third objective of this project is to identify the factors that drive or deter businesses and other members of the local community from donating to Merton Giving. We will accomplish this objective by distributing surveys to known donors to Merton Giving and conducting follow-up interviews with donors willing to participate.

3.3.1 Survey Current and Previous Donors to Merton Giving

Our project will define current donors as those who have made a contribution of any amount to Merton Giving within the last year, and previous donors as those who have contributed to PBGSs in Merton more than one year ago. We plan to distribute online surveys, created using the Qualtrics platform, to current and previous donors to Merton Giving through email. Assuming Merton Giving maintains a list of current and previous donors, we will negotiate with our project hosts to have Merton Giving send out an email to the donors with a link to this online survey. In these emails, we will be transparent and emphasize the purpose of our research, guarantee anonymity, and give participants the option to not answer questions or withdraw at any point. We believe surveys are appropriate here because they will allow us to efficiently reach a large number of donors with responses automatically stored in Qualtrics' database.

The survey will consist of structured questions pertaining to motivations and potential barriers to donating to PBGSs. We will use a branching system (Appendix G) to separate current and previous donors to highlight the factors that cause current donors to continue supporting

PBGSs in Merton and previous donors to stop giving. In addition, we will ask donors to provide their contact information only if they are willing to participate in a follow-up interview, which will be in a separate section of the survey to maintain anonymity. Pretesting this survey will be challenging, as we do not want to inconvenience donors and give them a draft survey to provide feedback on. As an alternative, we will review the survey as a team and have our project hosts and advisors review the survey. Then, we will revise the survey based on the given feedback before distributing it to the donors.

We will analyze the results by examining common responses and connections to responses from the previous interviews with Merton Connected/Giving, other PBGS, Merton Borough Councilors, and VCSEs. This analysis will provide a diverse set of perspectives that will guide us in developing and strengthening strategies that encourage donations to Merton Giving.

3.3.2 Follow-Up Interviews with Current and Previous Donors

We will also conduct follow-up interviews, following the same format from section 1.1.1, with donors who completed the survey and are willing to participate. These interviews will preferably be in person but will be moved online (via Zoom, Teams, or phone call) if necessary. These interviews will allow us to gain a deeper understanding of donor perspectives, uncovering complexities that may not be present in the surveys. The interview will consist of open-ended questions tailored to each donor's survey responses, and they will be designed to expand upon and create discussion about donors' past experiences with Merton Giving, motivations for donating, and recommendations for improvement (Appendix H). To analyze these responses, we will identify recurring themes relating to motivators and barriers to donating, as well as any points of contradiction between responses from different donors. Analysis of these in-depth responses will allow us to create a more detailed framework to encourage donations to Merton Giving.

3.3.3 Interviews with Corporate Partners

Our next task is to interview representatives of businesses who have donated to Merton Giving, following the same format from section 1.1.1, either in person or online. We will identify and reach out to these businesses via email using information from our project sponsor. These interviews will introduce donor perspectives from the corporate field, helping us understand the value businesses place on local philanthropy, their motivations for donating, and the benefits

they seek from supporting Merton Giving. Similar to the interview conducted in section 1.3.2, this interview will consist of open-ended questions designed to create discussion about past experiences with Merton Giving, motivations for donating, and recommendations for improvement (Appendix H). To analyze these responses, we will identify recurring themes relating to the motivators and barriers businesses face when donating, as well as any key insight into their decision-making process. Analysis of these in-depth responses will allow us to create targeted strategies to encourage donations from businesses to Merton Giving.

3.4 Objective 4: Create a Communication Framework Outlining the Most Effective Messages, Channels, and Engagement Strategies to Encourage PBG

The fourth objective is to develop a communication framework that identifies the most effective messages, channels, and engagement strategies that Merton Connected can use to optimize fundraising efforts for PBGS. We will accomplish this objective by analyzing the results of the surveys and interviews conducted as a part of previous objectives. Specifically, our report will identify the messages that resonate with supporters of PBGS in Merton, outreach strategies that inspire a positive response in the community, and messaging that is successful in increasing the community's understanding of PBGS. In doing so, our project will identify how communication frameworks can be measured and tested for efficacy. Accomplishing this objective will enable Merton Connected to optimize its fundraising by utilizing messages that resonate with the community.

3.5 Objective 5: Recommend Strategies to Merton Connected to Promote Donor Engagement, Enhance Community Awareness, and Optimize Fundraising Approaches

The final objective is to develop a robust series of recommendations that Merton Connected can implement to promote donor engagement, enhance community awareness of PBGSs, and optimize fundraising operations. We will accomplish this goal using the responses from surveys and interviews with stakeholders in PBGS, examining our background research on

Merton and its socio-economic divide, conducting a review of literature into fundraising strategies for charitable organizations in the U.K., and reviewing the current strategies being employed by Merton Connected to solicit donations to PBGS. Additionally, we will incorporate feedback from stakeholders on our proposals to further develop our recommendations. Finally, we will present a series of action items to Merton Connected and community leaders. Our conclusions and findings are detailed in the following sections.

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Appendix

Appendix A: Sponsor Description for Merton Connected

The borough of Merton extends over 14.7 square miles in southwest London and has a population of 215,000 people. Merton can be broken down into an affluent western half, and a significantly more deprived eastern half. Compared to the western half of Merton, the eastern half faces a greater concentration of children living in poverty and individuals working in insecure occupations, along with a greater number of lower-layer super output areas (LSOAs) by percentage in most deprived decile (The Merton Story, 2021). Additionally, east Merton's population has a larger Black, Asian, and Minority Ethnic (BAME) population than the western half. BAME groups account for a large percentage of the population with nearly 80,000 residents, 37% of the total Merton population (The Merton Story, 2021).

The divide between the affluent and impoverished citizens of Merton is evident in recent election results. In the 2022 elections, the eastern half of Merton overwhelmingly supported the Labour Party, while the more affluent western half favored Liberal Democrats and Conservatives (Figure 1). Today, the Labour Party controls 30 of the 57 Merton Council seats and the Mayor and Deputy Mayor positions (Merton Council, 2024). The political split between the two halves of Merton further highlights the geographic barrier between the working class and affluent citizens.
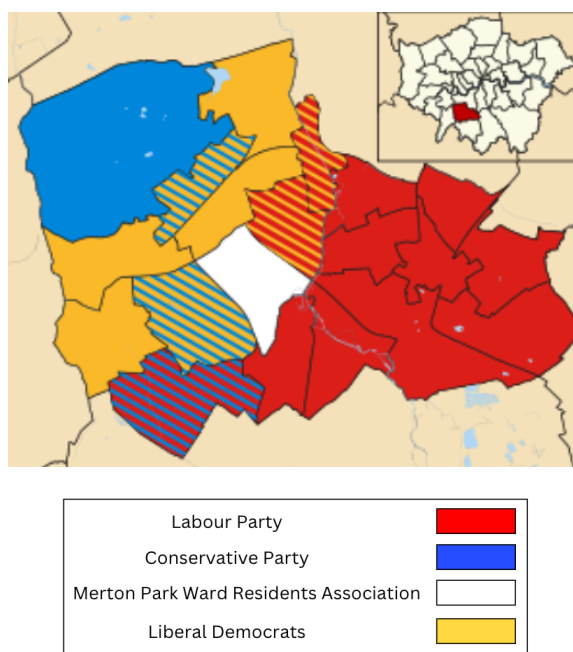

Figure 9: Merton Election Results by Party. (London Borough of Merton, 2025)

Launched in 1984, Merton Connected is a charitable organization that supports local Voluntary, Community, and Social Enterprise (VCSE) organizations that provide social services to benefit the borough's residents. (Merton Connected, 2021).

Merton Connected's mission is driven by three key objectives, and they are actively involved in seven distinct areas (Figure 2), with each area contributing to reaching their objectives. Their first objective is to promote charitable causes that benefit the public in Merton, focusing on the "advancement of education, the promotion of health, and the relief of poverty, distress, and sickness" (MVSC, n.d.-b). Merton Connected has focused on this objective by directly providing services to support the health and well-being of residents by delivering social prescribing and hosting Healthwatch Merton (Merton Connected, 2021), an organization that gathers feedback from residents' experiences with local health and social care services to better meet community needs (Healthwatch Merton, 2023). Additionally, Merton Connected coordinates the Home Library Service program, which provides books and audio material to residents who are unable to access a library (Merton Connected, 2021). Lastly, Merton Connected helps operate the Merton Community Hub connecting residents to the support they need within the community. This community hub was especially beneficial during the 2020 Coronavirus pandemic, which brought many challenges to daily life.

Figure 10: Areas Engaged (Merton Connected, 2021)

Another objective of Merton Connected is to strengthen local third-sector organizations by providing them with the "necessary support, information, and services to enable them to pursue or contribute to any charitable purpose" (MVSC, n.d.-b). To accomplish this goal, Merton

Connected and the Merton Chamber of Commerce established the Merton Giving Fund, a Place Based Giving (PBG) scheme that collects funds from local businesses and residents to support charitable organizations in the Borough (Merton Chamber of Commerce, 2024). In 2022, Merton Giving awarded £387,023 in grants to 70 charitable organizations, reaching 23,079 residents (Merton Connected, n.d.). Previously, the Merton Giving Fund has supported causes including loneliness, poverty, and mental health (Merton Giving, n.d.). The Merton Giving Fund is part of London Giving, which organizes and supports PBG schemes in the boroughs of London. Besides financial support, Merton Connected also promotes and matches volunteer opportunities from VCSE organizations with residents interested in meaningful work that gives back to the community. A diverse set of volunteering opportunities are offered that range from safeguarding, employee, and youth volunteering, ensuring that every resident can contribute some time to make a positive difference (Merton Connected, 2021). Volunteering is thriving in Merton, as it was estimated in 2021 that 19% of Merton's population of over 200,000 people participate in volunteering (Merton Connected, 2021).

Lastly, Merton Connected aims to "promote, organize, and facilitate cooperation and working partnership between third-sector, statutory, and other relevant bodies" to achieve the previous objectives mentioned above (MVSC, n.d.-b). For example, Merton Connected helps VCSE organizations register with regulatory bodies, including the Charities Commission and Companies House, ensuring legal recognition, which allows access to more funding opportunities, an amplified voice in influencing local policies, and an enhanced credibility for these VCSEs (MVSC FS22, n.d.).

Merton Connected consists of 22 employees who manage programs, secure funding, and engage with local communities; 6 trustees who provide policy and strategic leadership and guidance to the organization; and 11 volunteers who assist with various activities and initiatives (MVSC, n.d.-c). Financially, Merton Connected generates income primarily through government contracts and grants. Almost all of this income is passed on to "charitable activities" (Figure 3), which refers to any of Merton Connected's programs, services, or initiatives that give back to the community. In the most recent financial year (2023), Merton Connected generated approximately £1.7 million in income with around £500,000 from three government contracts and around £1 million from government grants, while around £1.4 million was allocated to "charitable activities" (MVSC, n.d.-a).
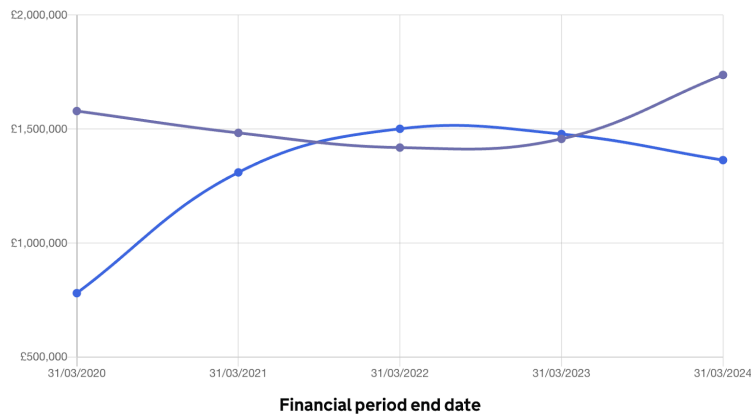
Figure 11: Merton Connected Income (Purple) and Expenditure - Charitable Activities (Blue) from 2020-2024 (MVSC, n.d.-a)

Appendix B: Interview Script for Staff at Merton Giving and Merton Connected

Consent and Preamble:

We are a group of students from Worcester Polytechnic Institute (WPI) conducting a research project in collaboration with Merton Connected to investigate factors that drive or hinder donations to Place-Based Giving Schemes (PBGS) from businesses and individuals.

We would be delighted if you would take 30 minutes to answer some questions about the history of Merton Giving and current practices employed by PBGS to encourage donations.

Your participation in this interview is completely voluntary and you may stop at any time. We will be taking notes during our conversation and may wish to quote you in our final report. Do you mind if we quote you by name, or would you prefer we anonymize your responses? Should you choose to remain anonymous, we will utilize pseudonyms to prevent disclosing your identity. We will, of course, give you an opportunity to review any quotations prior to publication. We will also be happy to provide you with a copy of our report when it is completed. Thank you for your support in this research.

Do you have any questions before we begin? If you have any concerns or questions after the interview, you can contact us at gr-lon.d25.merton@wpi.edu or our faculty

advisors, Laura Roberts, at lroberts@wpi.edu, and Farnoush Reshadi, at freshadi@wpi.edu.

Section 1: History of PBGS in Merton and London

1. What necessitates the need for PBGSs in Merton specifically?
2. What have been the challenges that PBGSs within Merton have faced in the past?
3. How do you think PBG schemes will need to adapt in the future based on current and future challenges?
4. What aspects of other PBGSs would Merton Connected/Giving like to emulate?

Section 2: Demographics of PBGS

5. What demographic has Merton Giving/Merton Connected focused on reaching through PBGS?
6. Which demographics have been the most receptive to PBGS used in the past?
7. Has the target audience for PBGS changed/evolved over time?

Section 3: Challenges within PBGS

8. Have you noticed any challenges/setbacks in reaching certain demographics through PBGS?
9. Have changes in government funding affected the reception of PBGS within Merton?
10. Are there any PBGS that you have wanted to implement in the past but did not have the necessary resources to create a successful model?

Section 4: Improvements to PBGS

11. Do you believe any methods that haven't been used in the past can be used to improve PBGS?
12. How can London's Giving and the Council continue to support and improve PBGSs in Merton?

Closing:

- *Is there anything else you think we should know about PBGS that we haven't covered?*
- *Do you mind if we come back to you for clarifications and follow-up questions?*

- *Who else would you recommend we talk to about PBGS?*
- *Thank you so much for your insights and time. We truly appreciate your contributions to this research.*

Appendix C: Interview Script for London's Giving

Preamble and Consent:

We are a group of students from Worcester Polytechnic Institute (WPI) conducting a research project in collaboration with Merton Connected to investigate factors that drive or hinder donations to Place-Based Giving Schemes (PBGS) from businesses and individuals.

We would be delighted if you would take 30 minutes to answer some questions about how PBGS are developed, sustained, and refined to better serve local communities.

Your participation in this interview is completely voluntary and you may stop at any time. We will be taking notes during our conversation and may wish to quote you in our final report. Do you mind if we quote you by name, or would you prefer we anonymize your responses? Should you choose to remain anonymous, we will utilize pseudonyms to prevent disclosing your identity. We will, of course, give you an opportunity to review any quotations prior to publication. We will also be happy to provide you with a copy of our report when it is completed. Thank you for your support
in this research.

Do you have any questions before we begin? If you have any concerns or questions after the interview, you can contact us at gr-lon.d25.merton@wpi.edu or our faculty advisors, Laura Roberts, at lroberts@wpi.edu, and Farnoush Reshadi, at freshadi@wpi.edu.

Section 1: Development of PBGS

1. How was the PBGS you are involved with initially established?
2. What factors contributed to its successful launch?
3. How do you identify and engage key stakeholders, such as donors and community partners?

Section 2: Refinement of Strategies

4. How have your strategies evolved since the scheme was launched?
5. What challenges did you encounter in refining your approach?
6. Can you share any specific practices that proved especially effective or ineffective?

Section 3: Sustaining PBGS

7. What strategies have you implemented to maintain donor engagement and financial sustainability?

8. How do you measure the impact of your PBGS initiatives on the community?

9. Are there any partnerships or collaborations that have been essential to the scheme's long-term success?

Section 4: Demographics and Donor Engagement

10. How do you identify the demographic groups your PBGS targets?

11. Have you noticed differences in how various demographics respond to PBGS initiatives?

12. What communication strategies have worked best for engaging different donor pools?

Section 5: Insights and Recommendations

13. What lessons have you learned from running this PBGS that could be useful for other schemes?

14. Is there any advice you would give to new PBGS initiatives starting in different boroughs?

15. Are there key trends or future challenges that you think PBGS will face moving forward?

Closing:

- *Is there anything else you think we should know about PBGS that we haven't covered?*
- *Do you mind if we come back to you for clarifications and follow-up questions?*
- *Who else would you recommend we talk to about PBGS?*
- *Thank you so much for your insights and time. We truly appreciate your contributions to this research.*

Appendix D: Interview Script for Other PBGS

Preamble and Consent:

We are a group of students from Worcester Polytechnic Institute (WPI) conducting a research project in collaboration with Merton Connected to investigate factors that drive or hinder donations to Place-Based Giving Schemes (PBGS) from businesses and individuals.

We would be delighted if you would take 30 minutes to answer some questions about how your PBGS has been developed, sustained, and refined to better serve your local community.

Your participation in this interview is completely voluntary and you may stop at any time. We will be taking notes during our conversation and may wish to quote you in our final report. Do you mind if we quote you by name, or would you prefer we anonymize your responses? Should you choose to remain anonymous, we will utilize pseudonyms to prevent disclosing your identity. We will, of course, give you an opportunity to review any quotations prior to publication. We will also be happy to provide you with a copy of our report when it is completed. Thank you for your support in this research.

Do you have any questions before we begin? If you have any concerns or questions after the interview, you can contact us at gr-lon.d25.merton@wpi.edu or our faculty advisors, Laura Roberts, at lroberts@wpi.edu, and Farnoush Reshadi, at freshadi@wpi.edu.

Section 1: Development of PBGS

4. How was the PBGS you are involved with initially established?
5. What factors contributed to its successful launch?
6. How do you identify and engage key stakeholders, such as donors and community partners?

Section 2: Refinement of Strategies

7. How have your strategies evolved since the scheme was launched?
8. What challenges did you encounter in refining your approach?
9. Can you share any specific practices that proved especially effective or ineffective?

Section 3: Sustaining PBGS

10. What strategies have you implemented to maintain donor engagement and financial sustainability?

11. How do you measure the impact of your PBGS initiatives on the community?

12. Are there any partnerships or collaborations that have been essential to the scheme's long-term success?

Section 4: Demographics and Donor Engagement

13. How do you identify the demographic groups your PBGS targets?

14. Have you noticed differences in how various demographics respond to PBGS initiatives?

15. What communication strategies have worked best for engaging different donor pools?

Section 5: Insights and Recommendations

16. What lessons have you learned from running this PBGS that could be useful for other schemes?

17. Is there any advice you would give to new PBGS initiatives starting in different boroughs?

18. Are there key trends or future challenges that you think PBGS will face moving forward?

Closing:

- *Is there anything else you think we should know about PBGS that we haven't covered?*
- *Do you mind if we come back to you for clarifications and follow-up questions?*
- *Who else would you recommend we talk to about PBGS?*
- *Thank you so much for your insights and time. We truly appreciate your contributions to this research.*

Appendix F: Interview Script for Merton Borough Councilors

Preamble and Consent:

We are a group of students from Worcester Polytechnic Institute (WPI) conducting a research project in collaboration with Merton Connected to investigate factors that drive or hinder donations to Place-Based Giving Schemes (PBGS) from businesses and individuals.

We would be delighted if you would take 30 minutes to answer some questions about your experiences working with Merton Connected and Merton Giving, as well as other Place Based Giving Schemes.

Your participation in this interview is completely voluntary and you may stop at any time. We will be taking notes during our conversation and may wish to quote you in our final report. Do you mind if we quote you by name, or would you prefer we anonymize your responses? Should you choose to remain anonymous, we will utilize pseudonyms to prevent disclosing your identity. We will, of course, give you an opportunity to review any quotations prior to publication. We will also be happy to provide you with a copy of our report when it is completed. Thank you for your support in this research.

Do you have any questions before we begin? If you have any concerns or questions after the interview, you can contact us at gr-lon.d25.merton@wpi.edu or our faculty advisors, Laura Roberts, at lroberts@wpi.edu, and Farnoush Reshadi, at freshadi@wpi.edu.

Section 1: Understanding of Merton Giving

1. What do you know about the origins and development of Merton Giving?
2. What do you know about Merton Giving's mission?

Section 2: Experience working with Merton Giving/Connected

3. Have you worked with Merton Giving in the past?
   a. *If yes:* What initiatives have you worked on which support Merton Giving?
   b. *If no:* Is there a barrier to working with Merton Giving?
4. Have you previously worked with other PBGSs?
   a. *If yes:*How does your experience working with Merton Giving compare to your experience working with other PBGSs?
   b. *If no:* What would make you consider working with other PBGSS in the future?
5. What is the primary method through which the Merton Council supports Merton Giving?

6. Does Merton Giving have a role in shaping the policies put forth by the Merton Council?

7. Which kinds of local issues are addressed by the council, and which are addressed by Merton Giving?

Section 3: Insights and Recommendations

8. Do you think the current political climate has affected/will affect residents' willingness to participate in PBGS?

9. Do you think any future government policies may inspire contributions to Merton Council or other PBGSs?

Closing:

- *Is there anything else you think we should know about Merton Council that we haven't covered?*

- *Do you mind if we come back to you for clarifications and follow-up questions?*

- *Thank you so much for your insights and time. We truly appreciate your contributions to this research.*

Appendix G: Interview Script for Staff at VCSEs

Preamble and Consent:

We are a group of students from Worcester Polytechnic Institute (WPI) conducting a research project in collaboration with Merton Connected to investigate factors that drive or hinder donations to Place-Based Giving Schemes (PBGS) from businesses and individuals.

We would be delighted if you would take 30 minutes to answer some questions about your experiences with Merton Connected and Merton Giving. The topics that will be included in this interview will include how your VCSE operates, views on PBGS, your relationship with Merton Giving, Merton Connected, and the Merton Council.

Your participation in this interview is completely voluntary and you may stop at any time. We will be taking notes during our conversation and may wish to quote you in our final report. Do you mind if we quote you by name, or would you prefer we anonymize your responses? Should you choose to remain anonymous, we will utilize pseudonyms to prevent disclosing your identity. We will, of course, give you an opportunity to review any quotations prior to publication. We will also be happy to provide you with a copy of our report when it is completed. Thank you for your support in this research.

Do you have any questions before we begin? If you have any concerns or questions after the interview, you can contact us at gr-lon.d25.merton@wpi.edu or our faculty advisors, Laura Roberts, at lroberts@wpi.edu, and Farnoush Reshadi, at freshadi@wpi.edu.

Section 1: Viewpoint on PBGS and Relationship with Merton Giving/Merton Connected

1. How long has your organization worked with Merton Giving?
2. In what ways has your organization worked with Merton Giving?
   a. What has been the overall sentiment of the relationship with Merton Giving/Merton Connected?
3. Does your organization understand how and when to collaborate with PBGS?
4. Are there any barriers to working with Merton Giving/Merton Connected?

Section 2: Relationship with Merton Council

5. To your knowledge, has your organization experienced any budget reductions?

a. *If yes:* How has Merton Connected supported your organization through these budget reductions?

b. How have these changes affected your daily operations?

Closing:

- *Is there anything else you think we should know about VCSEs that we haven't covered?*
- *Do you mind if we come back to you for clarifications and follow-up questions?*
- *Thank you so much for your insights and time. We truly appreciate your contributions to this research.*

Appendix H: Survey for Current and Previous Donors - Individuals

Preamble and Consent:

Thank you for taking the time to participate in our survey. This survey aims to help identify factors that lead people to donate to Merton Giving/Connected.

- The results of this survey will be kept confidential and will not be attributed to you in any way.
- Results of this survey will only be released in aggregate and with no personal identifying information.
- There will be an optional section at the end of the survey to leave an email address if you are willing to be contacted further on this topic.
- Your email address will not be shared with any outside group, individual, or organization and will not be used in any capacity other than contacting you further about this study
- Participation in the research is voluntary
- Participants may end their participation at any time
- Participants need not answer every question in the survey

Survey questions

Optional Follow-Up Interview: This section is separate from the survey responses to maintain your anonymity. Your contact information will only be used for follow-up purposes if you opt to participate in the follow-up interview.

    If you are interested in participating in an in-person interview to share your more specific experiences with Merton Giving/Merton Connected, please provide your contact information below. Participation is entirely optional. If you do not wish to participate, you can simply leave this section blank.

        Email : [Text Box]

        Phone Number: [Text Box]

1. Gender:
   a. Male
   b. Female
   c. Non-binary/other

       d. Prefer not to answer

2. Age:
       a. Under 25
       b. 25-34
       c. 35-44
       d. 45-54
       e. 55-64
       f. Over 65
       g. Prefer not to Answer

3. What ward of Merton do you live in?
       a. Abbey Ward
       b. Colliers Wood Ward
       c. Cannon Hill Ward
       d. Figge's Marsh Ward
       e. Cricket Green Ward
       f. Graveney Ward
       g. Hillside Ward
       h. Longthornton Ward
       i. Lavender Fields Ward
       j. Lower Morden Ward
       k. Merton Park Ward
       l. Pollards Hill Ward
       m. Raynes Park Ward
       n. Ravensbury Ward
       o. St Helier Ward
       p. Village Ward
       q. West Barnes Ward
       r. Wimbledon Park Ward
       s. Wandle Ward
       t. Wimbledon Town and Dundonald Ward
       u. Prefer not to answer

4. When did you first hear about Merton Giving/Merton Connected?

    a. Within the last 6 months

    b. 7-11 months ago

    c. 1-4 years ago

    d. More than 5 years ago

    e. Prefer not to answer

5. How did you first hear about Merton Giving/Merton Connected? (Check all that apply)

    a. Social media (Facebook, Instagram, etc.)

    b. Through a friend, family member, or colleague

    c. Email or newsletter

    d. At a local event

    e. Other - Please Specify - [Text Box]

6. How many donations have you made to Merton Giving/Merton Connected?

    a. 1 or 2 donations

    b. 3 or 4 donations

    c. 5+ donations

    d. Prefer not to answer

7. What led you to donate to Merton Giving/Merton Connected? (Check all that apply)

    a. Belief in the mission to support local initiatives and organizations

    b. A personal connection to a specific event or campaign

    c. Recommendation from a friend, family member, or colleague

    d. Desire to make a positive impact in my community

    e. Other - Please Specify - [Text Box]

8. What, if any, barriers have you faced in donating to Merton Giving/Merton Connected? (Check all that apply)

    a. Lack of transparency regarding how donations are used

    b. Difficulty accessing donation platforms or information

    c. Uncertainty about the effectiveness or impact of donations

    d. Other - Please Specify - [Text Box]

9. How would you describe your overall experience/perspective with Merton Giving/ Merton Connected?

  a. Very Positive

  b. Generally Positive

  c. Neutral

  d. Generally Negative

  e. Very Negative

10. Was your donation to Merton Connected due to an experience you've had with a VCSE or similar organization?

  a. Yes

  b. No

  c. Prefer not to answer

11. When was the last time you donated to Merton Giving/Merton Connected?

  a. Within the last 6 months

  b. 7-11 months ago

  c. 1-4 years ago

  d. More than 5 years ago

  e. Prefer not to answer

 If the survey respondent chooses (a) OR (b) then go to question 12

 If the survey respondent chooses (c) OR (d) then go to question 15

 If the survey respondent chooses (e) then go to question 18

12. Do you plan on supporting Merton Giving in the future?

  a. Yes

  b. No

  c. Prefer not to answer

13. Do you feel that Merton Connected/ Merton Giving properly acknowledges and recognizes their donors?

  a. Yes

  b. No

  c. Prefer not to answer

14. Do you feel a sense of community with other supporters of Merton Giving/Connected?

  a. Yes

  b. No

    c.   Prefer not to answer

15. What led you to stop donating to Merton Giving? (Check all that apply)

    a.   Barriers to contributing

    b.   Lack of recognition or acknowledgment

    c.   Lack of transparency

    d.   Fatigued by appeals to support charitable endeavors

    e.   Lack of a community among supporters of Merton Giving

    f.   Other - Please Specify - [Text Box]

16. Has Merton Connected/ Merton Giving stopped supporting initiatives that you want to see addressed?

    a.   Yes

    b.   No

    c.   Prefer not to answer

17. Was your donation the response to a recent cultural or political event?

    a.   Yes

    b.   No

    c.   Prefer not to answer

18. Do you have any other information about Merton Giving/Merton Connected that you wish to share?

[Text Box]

Appendix H: Follow-Up Interview Script for Current and Previous Donors

Preamble and Consent:

We are a group of students from Worcester Polytechnic Institute (WPI) conducting a research project in collaboration with Merton Connected to investigate factors that drive or hinder donations to Place-Based Giving schemes (PBGS) and develop targeted local strategies to enhance contribution from the corporate community, as well as local residents and individuals.

We would be delighted if you would take 30 minutes to answer some questions about your experiences with Merton Connected/ Merton Giving. The topics that will be included in this interview will include motivations for donating, the donation process, and recommendations for improvement.

Your participation in this interview is completely voluntary and you may stop at any time. We shall be taking notes during our conversation and may wish to quote you in our final report. Do you mind if we quote you by name, or would you prefer we anonymize your responses? Should you choose to remain anonymous, we will utilize pseudonyms to prevent disclosing your identity. We will, of course, give you an opportunity to review any quotations prior to publication. We will also be happy to provide you with a copy of our report when it is completed. Thank you for your support in this research.

Do you have any questions before we begin? If you have any concerns or questions after the interview, you can contact us at gr-lon.d25.merton@wpi.edu or our faculty advisors, Laura Roberts, at lroberts@wpi.edu, and Farnoush Reshadi, at freshadi@wpi.edu.

Different questions are provided for different survey responses, so universal topics relevant to all participants are provided below.

Section 1: Motivation for Donating to Merton Giving (More detailed for current donors)

1. What inspired you to contribute to Merton Giving?
2. How has Merton Giving's mission resonated with you?
3. What do you believe to be the impact of your contribution?
4. Is there anything you would like to see Merton Giving do before contributing again?

Section 2: Donation Process

5. Did you face any challenges or inconveniences while donating?

6. Are there any ways that would have been more convenient for you to donate?

7. Do you feel a sense of community with the other donors to Merton Giving?

Section 3: Recommendations for Improvement (More detailed for previous donors)

8. Do you think that Merton Giving could simplify the donation process any further?

    a. *If yes:* What do you think could be improved about the donation process?

    b. *If no:* What works well about the current donation process?

9. Would a tiered donation system that includes incentives for higher contributions motivate you to contribute further?

10. Do you think Merton Giving effectively communicates how your donation has made an impact in the community?

    a. *If yes:* What has Merton Connected done well in this regard?

    b. *If no:* What could be improved so that you better understand the impact of your contribution

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Section 4: Recurring Donors

11. Why have you continued to support Merton Connected/ Merton Giving?

12. How has Merton Connected/ Merton Giving changed since you started supporting them?

13. Are there any programs that Merton Giving/ Merton Connected has stopped supporting that you want to see brought back?

14. Are there any programs you would like to see Merton Giving/ Merton Connected support?

Closing:

- *Is there anything else you think we should know about anything we have talked about that we haven't covered?*

- *Do you mind if we come back to you for clarifications and follow-up questions?*

- *Thank you so much for your insights and time. We truly appreciate your contributions to this research.*

Appendix I: Interview Script for Corporate Partners

Consent and Preamble:

We are a group of students from Worcester Polytechnic Institute (WPI) conducting a research project in collaboration with Merton Connected to investigate factors that drive or hinder donations to Place-Based Giving schemes (PBGS) and develop targeted local strategies to enhance contribution from the corporate community, as well as local residents and individuals.

We would be delighted if you would take 30 minutes to answer some questions about your experiences with Merton Connected/ Merton Giving. The topics that will be included in this interview will include motivations for donating, the donation process, potential barriers to donating, and recommendations for improvement.

Your participation in this interview is completely voluntary and you may stop at any time. We shall be taking notes during our conversation and may wish to quote you in our final report. Do you mind if we quote you by name, or would you prefer we anonymize your responses? Should you choose to remain anonymous, we will utilize pseudonyms to prevent disclosing your identity. We will, of course, give you an opportunity to review any quotations prior to publication. We will also be happy to provide you with a copy of our report when it is completed. Thank you for your support in this research.

Do you have any questions before we begin? If you have any concerns or questions after the interview, you can contact us at gr-lon.d25.merton@wpi.edu or our faculty advisors, Laura Roberts, at lroberts@wpi.edu, and Farnoush Reshadi, at freshadi@wpi.edu.

Section 1: Motivation for Donating to Merton Giving

1. Can you share any previous experiences with Merton Giving that influenced your decision to donate?

2. How does Merton Giving's mission align with your company's values and goals?

    a. Are there any specific areas where you see a strong connection between your business and Merton Giving?

    b. Is there an area of Merton Giving's work that stands out most to your business?

3. Why does your business feel it's important to donate to causes like Merton Giving?

Section 2: Donation Process

4. Are there any donation methods or platforms your business prefers?

5. Do you feel Merton Giving has properly acknowledged your business's support? (Please elaborate)

Section 3: Potential Barriers to Donating to Merton Giving

6. Did you ever feel unsure about how your donation was used? (Please elaborate)

7. Would more updates about the cause or initiative you're supporting help you stay more engaged?

Section 4: Recommendations for Improvement

8. Any suggestions on how Merton Giving could make it easier for businesses like yours to donate based on your past experiences?

9. Would incentives, like recognition or special programs for businesses, encourage you to donate more? (Please elaborate)

10. Would more detailed reports about how donations are used help your business feel more confident? (Please elaborate)

Closing:

- *Is there anything else you think we should know about anything we have talked about that we haven't covered?*
- *Do you mind if we come back to you for clarifications and follow-up questions?*
- *Thank you so much for your insights and time. We truly appreciate your contributions to this research.*