



# Business Plan

## Bike Walk Connecticut 2014

### Introduction

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Bike Walk CT developed this business plan to focus its resources and efforts to more effectively promote its mission, which is to “change the culture of transportation through advocacy and education to make bicycling and walking safe, feasible, and attractive for a healthier, cleaner Connecticut.”

Great progress has been made over recent years, but there is a lingering feeling among the Executive Director (ED), board members, volunteers and members, that the staff is stretched thin and the organization’s impact has been broad and shallow rather than focused and dramatic. Bike Walk CT hopes that by executing this business plan, over the next 1-3 years, the organization will become more streamlined and focused on programs which we are uniquely positioned to execute exceptionally well and produce significant mission impact.

While some financial investment is required to implement this plan and move the organization where we think we need to go, a greater focus on fundraising is critical now and in the future. Additionally, Bike Walk CT has significant reserve funds from which to draw for sound investments.

This plan is ambitious and, in some cases, represents a dramatic shift in what we do and how we operate as an organization. This change will require commitment and flexibility from both the board and ED, as the culture, roles, responsibilities, and expectations are likely to change.

### ***Summary of Plan and Vision for Future***

Rather than doing a variety of things fairly well, and in some cases not very well, Bike Walk CT has identified two major programmatic areas that are central to its mission, where we alone can excel in Connecticut: advocacy and education. With that in mind, we are going to operate with a singular focus of developing those offerings and executing them with excellence.

In order to be THE go-to organization representing biking and walking as active transportation and providing relevant education in Connecticut, we are eliminating or drastically scaling back all activities that do not contribute *directly* to advocacy and education so that the staff and board can dedicate their time most effectively. Bike Walk CT will develop and strengthen relationships with policy makers as well as donors throughout the state in pursuit of the organization’s mission.

### ***Organizational Development and Transformation***

In order to successfully implement this plan and improve the effectiveness and scale on which Bike Walk Connecticut achieves its mission, significant organizational changes are required, including, but not limited to:

- **Staff Size and Allocation**



- Additional staff resources are required for fundraising, education, and potentially advocacy, communications, and planning (note that adding staff may require upgrading internal policies, procedures, and systems)
- The Executive Director’s time should be focused much more on program priorities rather than organizational and board management, which should require no more than 20% rather than the current 40% or more<sup>1</sup>
- **Board Role and Function**
  - Board leadership and enthusiastic commitment to the mission and this plan are critical
  - Existing board vacancies should be filled as soon as possible with fundraising and advocacy experts to help advance the mission
  - Board function should be streamlined to decrease the staff time required to organize, prepare for, and facilitate meetings and respond to board requests. Specific ideas to be considered:
    - Setting a calendar for board meetings to promote focus and efficiency
    - Adopting processes to streamline discussion and decision-making
    - Upgrading board member agreement to clarify and document expectations for time commitment, specific roles (e.g., bike shop liaison, stakeholder/donor cultivation, participation on task forces), and fund raising, beginning with \$2,000/board member/year
- **Mission-Vigilance**
  - Bike Walk Connecticut should vigilantly review activities on an ongoing basis to ensure they are driving and not distracting from the mission, and if they are not, figure out ways to stop doing them immediately. Some specific questions:
    - Does Bike Walk Connecticut NEED to produce newsletters twice a month?
    - Does the board NEED to meet in full monthly?

**Resulting Programs**

Program/Initiative	Description
Advocacy	Relationships and presence with state level policymakers, and an active grassroots constituency, to proactively advance biking and walking as transportation options throughout the state. Will require increased focus on relationship building, policy networking, and organizing the bike/ped community.
Education	Provide statewide bicycle and pedestrian safety education, emphasizing Bike Walk CT’s unique offerings. Will require new funding to cover education staff and resources.
Fundraising	Bike Walk CT must develop new and more stable sources of revenue to further professionalize and expand staffing.
Explore Statewide Event	The board and Executive Director will explore the feasibility of a potentially game-changing annual statewide ride to generate significant revenue, build relationships throughout the state, and make CT a more bike-friendly state.



**Resource Allocation**

It is essential that Bike Walk CT have adequate resources firmly in place before taking on any initiative or program. The table below lays out estimates for the future allocation of staff time associated with each of the initiatives in this plan. This is intended to be used as a living document and updated as progress is made and staff requirements are clarified.

<b>Program</b>	<b>Executive Director</b>	<b>Administrative Assistant</b>	<b>Other</b>	<b>Board</b>
<b>Advocacy</b>				
Year 1	35%			15% (engaging bike shops, clubs & their members and customers; responding to calls to action)
Year 2	35%			15%
Year 3	35%			15%
<b>Education</b>				
Year 1	10% to hire and manage staff	5% (registrations)	50% coordinating classes, building new business, securing grants	15% (conference and/or bike ed)
Year 2	10% to manage staff	5% (registrations)	50% coordinating classes, building new business, securing grants	15% (conference and/or bike ed)
Year 3	5% to manage staff	5% (registrations)	50% coordinating classes, building new business, securing grants	15% (conference and/or bike ed)
<b>Fundraising</b>				
Year 1	25% building capacity, hiring fundraiser, cultivating donors		30% dedicated resource	10% fundraising targets and cultivating major donors
Year 2	20% managing fundraiser, engaging major donors		50% dedicated resource	10%
Year 3	15%		75% dedicated resource	5%



Statewide Fundraising Event				
Year 1	10%		n/a	80% assessing feasibility and then running
Year 2	15%		50%	20%
Year 3	10%		75%	5%
Management & Admin				
Year 1	20%	95% (admin, member mgmt, communications)	—	5% (governance, policy)
Year 2	20%	95% (admin, member mgmt, communications)	—	5% (governance, policy)
Year 3	20%	95% (admin, member mgmt, communications)	—	5% (governance, policy)

## Advocacy Program: Promoting bicycling and walking as active transportation

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### Overview:

Advocacy is ongoing and is core to Bike Walk CT’s mission. “Advocacy” means recommending specific policies or taking actions that advance the interests of cyclists, pedestrians and the active transportation movement, building public support for those policies, and influencing policymakers to adopt and enforce them. Whereas local groups are best positioned to do this work at the local level, Bike Walk CT is uniquely positioned to do this work at the state level. With adequate staffing, Bike Walk CT could be well-positioned to help build capacity at the local level.

Bike Walk CT’s advocacy program entails:

- Defining the organization’s concrete advocacy agenda, which may evolve from year to year as conditions and accomplishments merit. Examples include getting the VU bill enacted, promoting Complete Streets implementation via the five-year DPH contract, organizing a statewide Share the Road campaign, and drawing from other measures recommended by the League of American Bicyclists as part of CT’s Bike Friendly State Ranking.
- Government relations, primarily at the state legislative and executive branch levels
- Expanding and organizing the bike/ped community as grassroots advocates for active transportation
- Cultivating relationships to promote Bike Walk CT’s agenda and the organization itself:
  - Policy makers at the state and local levels
  - Colleagues at related advocacy organizations



- Specific local governments or partners who can pursue these relationships
- Bike clubs
- Bike shops
- Potential partners and sponsors

### ***Current Situation:***

Bike Walk CT has been gaining visibility and name recognition with key policymakers, but still not at the level of comparable organizations in states like Delaware. There have been some notable wins, such as the recent passage of Vulnerable User bill, a five-year effort; and passage of the Complete Streets and the 3-foot passing laws in 2009. The board has a network of contacts among state leadership and corporations, but engaging those contacts in our work and translating them to action and policy has had limited traction.

### ***Target State 2017:***

Bike Walk CT will be the organization that key decision makers and constituents contact about bicycling and pedestrian interests. Additionally, Bike Walk CT will have such significant and strong relationships among the policymaking community, that we will be aware of and contributing to any policy that may have implications for our members and constituency. Cyclists, pedestrians, and smart growth advocates around the state will recognize the need for a statewide advocate and become members or donors. It will be the social norm for bike/ped enthusiasts to support Bike Walk CT financially and as grass roots activists.

### ***Ongoing Advocacy Initiatives***

- Launch complete streets advocacy contract with DPH, (conduct statewide survey; create scorecard; host advocacy workshop/s; create online toolbox).
- Promote bike commuting with National Bike to Work Day.
- Set and pursue legislative agenda based on current conditions
- Build grassroots advocacy corps

### ***Annual Advocacy Goals:***

- 2014: Get a vulnerable user law passed. Launch complete streets advocacy campaign through DPH contract. Recruit two new directors with expertise in government affairs or community organizing, or experience as a legislator, mayor or first-selectman.
- 2015: Launch grant-funded Share the Road multimedia campaign. Get DOT to adopt statewide mode share goals. Get dedicated state funding in DOT budget for bike/ped projects and programs. Get subcontract to promote National Bike to School Day and Walk to School Day.
- 2016: Get subcontract to promote National Bike to School Day and Walk to School Day.
- 2017: Compete for three-year Safe Routes to Schools contract.



**Near Term Advocacy Activities:**

Activity	Lead	By
Establish board task force to coordinate relationship cultivation with bike shops, bike clubs and their members (Recruit Task Force; Identify and assign contacts; Train board; Establish tracking mechanism)	ED, Board Chair	5/31/14
Announce, publicize Complete Streets advocacy campaign	ED	5/23/14
Develop, test and publicize statewide public opinion survey.	ED	5/30/14
Hire intern for complete streets campaign.	ED	5/16/14
Take municipal inventory of complete streets policies, bike/ped task forces,	Intern	6/1/14
Develop town by town complete streets scorecard	ED	6/30/14
Publicize online complete streets advocacy toolkit	AA	6/30/14
Hold complete streets leadership forum	ED	6/30/14
Define parameters of Share the Road campaign and funding partnership	ED	7/1/14

**Resources:**

ED 35%; 3-person board task force each spending 3-4 hours initially to organize, then 2 hours/month to keep the effort on track; 4 hours per month from board members as liaisons/ambassadors to bike shops and clubs.

**Assumptions and Dependencies:**

Expanding and more fully engaging bike/ped enthusiasts, such as bike shops and their customers, bike clubs and their members, and bike commuters as citizen activists, while continuing to build relationships and clout among policymakers, will generate more wins and a faster rate of progress for active transportation. It will also enable Bike Walk CT to make a stronger case to donors about the impact of their contributions.

## **Education Program: Educating to support bicycling and walking as active transportation**

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**Overview:**

Education is ongoing and is core to Bike Walk CT’s mission, although it needs to be focused more sharply on areas where the organization is positioned to offer services not offered by others, for example, rigorous programs based on established national standards and curricula.

In addition to bike education, “education” also entails the semi-annual Bike Walk Summit, educating the public through a Share the Road campaign, and providing technical assistance and



specialized expertise to communities, businesses, and schools that want to become bike- and walk-friendly. Taking our education work to the next level will require dedicated staff.

### ***Current Situation:***

Bike education has been among Bike Walk CT's successes, but it has been a challenge to sustain a robust, ongoing program. The 4<sup>th</sup> grade bike education program, which was funded by a grant, was well received and fits squarely within the organization's mission, but it has been dormant since the grant ended. Traffic Safety 101 classes are successful, although it requires some effort to organize instructors, locations, and advertising. There is interest in shorter, less intensive programs like lunch and learn clinics, but the lack of dedicated staff makes it difficult to deliver such programs on any regular basis.

### ***Target State 2017:***

Bike Walk CT provides bike education classes and clinics throughout the state, to 500 adults each year in TS 101, generating \$24,000<sup>1</sup>; to employers and groups in 28 clinics per year (one a week for 7 months), generating \$10,000; to 1000 youth generating \$6250<sup>2</sup>; and via bike fleet rentals for 20 weeks, generating \$5000 per year<sup>3</sup>, being supported by one full-time staff whose position is funded by grants and registration fees, and by contractor instructors. Bike Walk CT is known throughout the state as the main supplier of certified courses. This program may represent a net cost for the first year or two as grant funding is secured and the program is expanded throughout the State, but after it is up and running. Staff resources will provide the entire infrastructure for the program, including maintaining an updated calendar of upcoming courses, promoting the offerings, maintaining grant funding, organizing and coordinating training delivery (facilities, equipment, instructors), and maintaining a database to track all aspects.

### ***Ongoing Education Initiatives***

- TS 101, clinics, school-based programs; bike fleet rental
- Hold workshop(s) as part of DPH complete streets contract
- Hold semi-annual Bike Walk Summit, possibly as part of complete streets work

### ***Annual Education Goals:***

- 2014: Pursue funding for Share the Road campaign. Hold 10 TS101 trainings. Secure initial funding of \$25,000 for education program and staff. Identify and pursue recurring grant funding, with at least some successes. Develop initial education workplan and calendar.

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<sup>1</sup> Based on 4 TS 101s per month from May thru Oct = 24 classes. At 20/class =480 people, x \$50 ea = \$24,000

<sup>2</sup> Based on 25 classes of 40 youth per class, at \$250 per class, guessing at the average cost the public schools and camp markets will bear. Those who were involved with the previous grant-funded bike ed program are needed to advise better on these projections.

<sup>3</sup> Based on current rate of \$250/week, guessing at rentals for 20 weeks /year? No idea. We need to consider market demands and ability to pay, especially as to school systems.



- 2015: Hire part-time bike education coordinator. Launch funded statewide Share the Road campaign. Solicit \$40,000 in funding to hire planner to provide technical assistance for local bike/ped projects.
- 2016: Expand bike education coordinator to full-time position. Hire planner to provide technical assistance for municipal bike/ped projects, bike friendly communities, businesses, schools and universities.
- 2017: Expand fee-for-service offerings; secure recurrent grant or contract funding.

***Near Term Education Activities:***

<b>Activity</b>	<b>Lead</b>	<b>By</b>
Recruit instructors, schedule TS 101s through October	ED	5/31/14
Publicize bike fleet rentals	AA	5/31/14
Arrange for bike maintenance between rentals	ED	5/31/14
Update template for bike fleet rental contracts	ED	5/31/14
Hire part-time fundraiser to solicit funds for education program and overhead	ED	6/30/14
Analyze realistic market demand and ability to pay for a suite of bike ed programs	Task Force, Fundraiser	7/31/14
Develop phased bike ed program plan, budget, and schedule	Task Force	8/31/14
Get ready to hire p/t bike ed – Research, write job description, research salary, advertise job, screen, interview, make offer	Task Force	11/30/14
Hire program manager - screen, interview, make offer	ED	1/31/15
Launch phased bike-ed program; recruit instructors; publicize; start sales calls with schools, camps, clubs	Bike Ed	2/15/15

***Resources:***

ED: 10%; Education Program Manager: 50%; AA: 5%; Board Task Force:

***Assumptions and Dependencies:***

Improving the extent of Bike Walk CT’s impact in this area will be linked to the organization’s ability to increase fundraising to support the hiring of staff to focus on education.

However, if this initiative is successful, it will greatly expand Bike Walk CT’s name recognition and constituent base. If Bike Walk CT is strategic about this exposure and support, it should be able to generate substantial additional funding through course fees, grants, and constituent support.



## Fundraising Program

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### ***Overview:***

Achieving the goals of this business plan will require both additional paid staff and additional, but also more focused, involvement from Bike Walk CT's Board. Even with a narrower focus on advocacy and education, Bike Walk CT will likely need to augment existing staff with a fundraising specialist and additional administrative support. Board participation in fundraising will increase as well, with the fund raising specialist providing training, collateral materials, and support. Initial funding for these additional resources can be made available from Bike Walk CT's reserves until they become self-supporting, targeted for the end of Year 1 of this plan.

### ***Current Situation:***

By undertaking so many varied activities, Bike Walk CT has not focused on or excelled at fundraising in the past, and so the revenue stream has been unpredictable and vulnerable to dramatic swings due to weather or scheduling of competing events. The Board and ED have useful contacts among potential corporate sponsors, grant-making organizations, bike clubs, etc., but need professional expertise to capitalize on those relationships. See analytic tool at end of this document.<sup>2</sup>

### ***Target State 2017:***

By 2017, Bike Walk CT will have a well-established donor cultivation and fundraising program in place, with active Board involvement and support from professional fundraising staff. **We anticipate that executing this initiative effectively could increase revenues to around \$250,000 per year by 2017.**

### ***Ongoing Fundraising Initiatives***

- Annual appeal
- Annual dinner and silent auction
- Bike shop/bike club liaison program
- Business membership campaigns
- Business sponsorship appeals
- Fee for service contracts and programs (e.g. complete streets advocacy; share the road campaign; bike education programs)
- Grant seeking
- Individual membership campaigns

### ***Annual Fundraising Goals:***

Bike Walk CT would like to see aggressive increases in fundraising and budget size, along the lines of the following progression:

2014: Bring in revenue of \$135,000 (current budget). Recruit two directors with significant fundraising experience or significant fundraising connections. Hire part-time, experienced fundraising professional. Make go/no-go decision about a statewide tour.

2015: Increase annual revenue to \$160,000 or more.



2016: Increase annual revenue to \$190,000 or more.

2017: Increase annual revenue to \$230,000 or more.

***Near Term Fundraising Activities:***

<b>Activity</b>	<b>Lead</b>	<b>By</b>
Determine priority areas for revenue expansion	ED	6/30/2014
Hire Fundraising Resource – research compensation levels and job descriptions, advertise, screen, interview, make offer	ED	9/30/2014
Recruit two directors with significant fundraising experience or significant fundraising connections (e.g. strong corporate or health insurance prospect)		
Make go/no-go decision about statewide tour following due diligence research and exploring partnership possibilities with bike clubs, Tourism/DECD		9/1/2014
Develop 2015-17 Fundraising Plan	Fundraiser, ED, Board	11/30/2014
Review Progress To Date	Fundraiser/E D/Board	6/30/2015

***Resources:***

ED: 25% for fundraising generally, plus 10% for statewide event research and planning

Fundraiser: 50%

Board: Set \$2K goal, and an expectation of time devoted to donor cultivation, working with fundraiser

***Assumptions and Dependencies***

This initiative will represent a significant change for the organization – likely requiring a shift in culture and focus and the hiring of additional staff. Bike Walk CT’s ability to evolve into a successful fundraising organization will be critical to expanding mission reach and impact.

## **Fundraising Initiative: Explore Major Statewide Touring Event**

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***Overview:***

This is a new potentially high priority initiative to investigate the feasibility of Bike Walk CT organizing and running an annual statewide touring event as is done in Virginia and Iowa. If successful, the event would be a major fundraiser, raise the profile of Bike Walk CT statewide and promote key mission areas of Bike Walk CT, fostering partnerships with local bike groups, corporate interests, and tourism agencies, while promoting bicycling culture in Connecticut.



**Current Situation:**

This event would replace Discover Hartford with a much larger activity with a more ambitious geographic scope and substantially more revenue. Discover Hartford, while popular with members and board, is local, labor-intensive, and not particularly fruitful from a fundraising perspective. When staff time required is considered, the event often operates at a net loss.

**Target State 2017:**

If determined to be feasible, Bike Walk CT is running an annual major event that attracts participants from across the state and beyond, and is generating substantial revenue in the neighborhood of \$150,000 net by FY 2017.

**Annual Goals:**

- 2014: Decision on whether and how to proceed, and detailed plan, budget, schedule
- 2015: Inaugural event, raising a net of \$25,000
- 2016: Revenues increase from a combination of grants, sponsors, local organizations, and registration fees. Raise a net of \$75,000.
- 2017: Running event is starting to become routine, generating consistent and significant revenues and resulting in robust relationships with new constituencies throughout the state. Raise a net of \$150,000.

It will be critical that this be a profitable event that covers hiring staff or a contractor who will be dedicated to running it, allowing the Executive Director and other staff to focus on growing the organization in the areas of advocacy, education, and fundraising.

**Near Term Activities:**

Activity	Lead	By
Conduct research and formulate a recommendation – Research other state programs; engage DECD, state tourism office, experienced large scale tour organizers. Develop business plan that DECD will invest in.	ED, Board TF	7/31/14
If going forward, develop and execute detailed plan for 2015 event. Consider strategic partners around the State to help with detailed planning and execution	ED, Board TF	8/31/14
Evaluate 2015 event and develop a plan for 2016 and beyond		8/31/15

**Resources:**

Year 1: ED 10%; Board 75% (**3-person board task force**<sup>3</sup> each spending up to 10 hours/month; 2 hours per month from other board members.

**Assumptions and Dependencies**

It is critical that Bike Walk CT frame this initiative so it advances the organization’s mission of promoting biking (and walking?) as active transportation. While it has the potential to raise significant revenue and increase awareness and impact of Bike Walk CT– making it truly a



game-changer for the organization – it is important to recognize that it is a dramatic departure from current operations and will take considerable effort and planning and partnering with other experienced organizations to ensure success. It is critical to do all this while not drawing staff time away from the core mission-critical initiatives of advocacy and education.

## Points of Clarification Needed

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- When we refer to percentages for board time, what do we mean? The board member agreement talks about a commitment of 5 hours per month on average.
- At what point should the possibility of a second education staff person be evaluated?
- Do we want to hire the fundraiser first, then a bike ed person? Could we even afford to hire both simultaneously? We should prepare a cash flow analysis. Responses are expected from the LAB and Alliance about fundraiser recommendations and what salary we should be prepared to offer.
- Can we undertake Discover Hartford at the same time that we are evaluating the feasibility of a statewide event?

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<sup>1</sup> Examples of Management & overflow Admin tasks that can't be done in 15-20 hrs per week by AA (who also handles communications, social media and event planning):

- Prepare materials for outreach
- Strategic/business planning
- Budget development
- Performance evaluation & goal setting
- Develop & maintain membership management system
- Investigate, test, migrate to new member management system
- Monthly board and executive committee meetings – attend, plan for, prepare agendas and board packages, get food, drinks, supplies; clean up
- Committee meetings – schedule, help plan agendas, recruit for tasks
- Develop policies – conflict of interest, document retention,
- Recruit new board members – eg. Leadership Greater Hartford application system
- Board Room page – update with minutes, agendas, reports, important organizational info
- Reports and filings – quarterly and annual lobbying, SOTS
- Obtain & renew GL, D&O, property insurance
- Landlord/lease discussions
- Get new storage facility
- Recruit board reps for various public meetings and outreach events
- Design and write annual report (still in draft)
- Create board manual
- Member management
- Mail, banking, recordkeeping
- Meeting rsvps
- Recruit committee members and chairs
- Grassroots advocacy – getting directors and members to contact legislators
- Collect minutes from secretary
- Collect financials from treasurer
- Get checks issued
- Issue, Collect w9s from contractors



<sup>2</sup> The following table will enable Bike Walk CT to examine its current fundraising streams and evaluate the potential for expansion and the resulting potential impact.

Category	2013	% of total	Effort to Grow	Potential Impact	Comment
Rides & Walks	\$ 26,477	24%			
Corporate Contributions	\$ 21,129	19%			
Dinner/Auction	\$ 18,398	17%			
Memberships	\$ 11,949	11%			
Individual Contributions	\$ 7,346	7%			
Bike Education	\$ 6,247	6%			
Grants	\$ 5,000	5%			
Bike Walk Summit	\$ 4,745	4%			
Bike to Work	\$ 2,575	2%			
<b>Total</b>	<b>\$ 103,866</b>	<b>95%</b>			
<b>Other</b>	<b>\$ 5,541</b>	<b>5%</b>			
<b>Total</b>	<b>\$ 109,407</b>	<b>100%</b>			