

Year in Review: Accomplishments with Bike Walk Connecticut from Apr 2012 – Apr 2013

Overview

In the year that I have been with Bike Walk Connecticut, I hope you will agree that we are making significant strides in building public awareness of our organization, and having impact that is truly statewide. In the last year, we have started to bring considerable focus and discipline to the foundational elements of a high-performing organization, including our strategic planning, governance, budgeting process, and day-to-day administration. Looking back, I see myself as functioning as the organization's business manager, lobbyist, and communications chief, while our highly committed board has been essential in helping to carry out the many other components of our mission.

As I start my second year, I am particularly excited about the possibilities we are exploring for the organization's direction in the membership and revenue development committee, engaging state government in Bike to Work Day, promoting more directly bike friendly businesses, communities and universities; helping a bike/ped advisory group get started in Hartford; being part of the process in helping to frame DOT's transportation vision; and engaging new groups of active transportation proponents beyond the usual suspects.

This review is organized by our new committee structure, with the addition of a separate category on "Administration, Governance and Management." I have prefaced each category with a summary of my initial assessment coming into the position, followed by my accomplishments and recommended next steps.

Administration, Management & Governance

Initial Assessment

A significant number of administrative duties were handled by a highly dedicated volunteer, who upon my hiring, expressed desire to transition out of his role. The allocation of ED's time to administrative work did not consider the resignation of volunteers. Accounts were decentralized and managed by various volunteers and previous board members. No listing of accounts and administrative access information was available. There seemed to be duplication of effort, and inconsistency, between logging all receipts and contact information in Giftworks, Quickbooks and Constant Contact.

Board members and their terms were being tracked well, but those documents were not centrally located or readily available to the ED.

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Strategic plan was incomplete, lacking timeframes, workplans, budget allocations and staff time allocations. Board meetings were not addressing strategic plan progress. No organized board manual was in place or readily available to the ED. Duties of officers and committees were not clearly defined.

Accomplishments

1. Absorbed member management duties from volunteer
2. Absorbed mail and banking duties from volunteer
3. Identified some \$10K in PayPal account that was forgotten, boosting our bottom line nicely
4. Implemented a more defined committee structure to align with our programs
5. Defined scope of work of committees
6. Created board skill profile grid
7. Began centralizing accounts and acquiring administrative access to them. Many important organizational accounts such as email hosting, web hosting, PayPal, various Google accounts, have been managed by various volunteers.
8. Created blog-style Boardroom page on website to function like an intranet and serve as a centralized repository for important organizational documents and information. Set up Feedburner account for this page to ensure that directors received email notices each time an entry was added to the Boardroom page.
9. Track all checks received and deposited and report to Treasurer
10. Track all PayPal receipts and update membership, events, and purchase records as appropriate
11. Completed board resolution adding me as signatory to bank accounts and checks, removing volunteer as signatory, and authorizing me to enter into contracts on behalf of the organization.
12. Assisted with identifying outdated entries and accounts in 2013 budget
13. Track and report time dedicated to various programs and organizational work, to serve as a useful management tool for allocating resources and measuring real costs of our programs.

Recommended Next steps

1. It is critical to the organization's viability that we prioritize our programs and realistically allocate staff time according to its highest and best use, within the constraints of actual work hours available in a year. Time for administrative duties must be realistically allocated. The board's enthusiasm for taking on new projects that haven't been addressed in the strategic plan, have no staff time allocated to them, and have limited or no revenue potential is this organization's most significant threat to its sustainability.
2. Enlist full support of the board for completing and executing strategic plan with measurable goals, timelines, consistent with existing resources. Schedule tasks associated with goals on the calendar to ensure that we address them methodically. Report on progress and obstacles, identify any related issues for the board, at each board meeting.
3. Enlist full support of board to run more disciplined and focused board meetings, reserving detailed discussions for committee meetings.
4. Through the executive committee, conduct annual survey of the board using one of the McKinsey board survey tools.
5. Develop a plan for hiring at least a half-time administrative assistant.

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6. Develop a plan for providing health insurance benefits. As a “socially progressive” organization, it is important to provide health insurance benefits to employees.
7. Build reserve fund of at least 3-6 months operating expenses. Define one month’s operating expenses.
8. Develop board manual.
9. Update board member agreement to reflect the legal duties of board members (3Ds) and current expectations.
10. Develop conflict of interest policy.
11. Ensure that Bike Walk CT has administrative rights to all accounts associated with the organization.
12. Develop operating manual that includes usernames and passwords for all accounts.
13. Reinforce board’s use of boardroom page of website.
14. Consider holding a refresher on legal duties of boards and good governance measures at a future board meeting.

Finance & Budgeting

Initial Assessment

Treasurer was intimately involved in the organization’s finances and bookkeeping, which is often not the case in many nonprofits. Observed that treasurer was asking important questions about financial safeguards on checkwriting and spending approvals. Appreciated that ED was not also expected to manage bookkeeping and bill-paying.

Accomplishments

1. Identified need for budget to align with our strategic plan goals, programs and events.
2. Pared down items in U-Haul storage, downsized storage space to reduce bill by about half, then secured storage area onsite at a rate slightly lower than U-Haul’s rate.
3. Following President’s guidance, accomplished significant reduction in insurance costs.
4. Achieved various cost savings, including:
 - Reduced webhosting costs by changing provider to Weebly; preserving nearly all of the \$1500 that had been budgeted for web services;
 - Saved another \$3000 by minimizing costs for books & subscriptions; postage and mailing; printing & copying; supplies; and travel ;
 - Discontinued use of costly Active.com event registration service, shifting to flat fee of \$15/month (as needed) for Constant Contact event registration system, allowing us to preserve more of our registration fees than before.;
 - Eliminated need for Intuit credit card processing service and associated fees of about \$20/month;
 - Deferred cost of upgrading to new version of GiftWorks while evaluating its utility as a member management system.
5. Online annual appeal yielded in the neighborhood of \$2000-2500.

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6. Handled initial investigation of IRS assessment for underpayment of a prior year's employment tax.
7. Currently exploring DreamHost's free email hosting for nonprofits, possibly saving \$120.
8. Updated PayPal records to remove David Westcott as owner and administrator.
9. Developed system for invoicing and tracking accounts receivable.
10. Added finance documents to the Boardroom page on a regular basis so they are available for easy reference in the future.

Next steps

1. Continue to work with board to regularly evaluate the business case for Bike Walk CT activities and programs.
2. Work with Treasurer to build a small Finance Committee.
3. With Finance and Membership and Revenue Development committees, develop a plan to maintain 3-6 months operating expenses and to build sufficient revenue to support a half-time administrative assistant on an ongoing basis.
4. Be of more help to the Treasurer in categorizing bills expenses to align with budget ledger categories.
5. Refine our invoicing and accounts receivable systems.
6. Further refine appropriate controls for approving expenses; document in operating manual and board manual.

Advocacy

Initial Assessment

A handful of members had been actively and effectively involved in monitoring legislation and offering testimony at legislative hearings. An informal collaboration structure with other advocates remained in place from the prior ED's work. The organization could be more involved at higher levels of administrative agencies. Board members don't share a consistent definition of what "advocacy" entails for our purposes. The organization did not have a process in place for defining legislative priorities or an active advocacy committee. The recommended allocation of 10% of the ED's time to advocacy is inconsistent with our mission.

Accomplishments

1. Initiated regular conferences with other transportation advocates to establish BWCT as a more significant presence on the legislative advocacy front and to help gather valuable insights.
2. Prepared written testimony on: SB 191, the Vulnerable User bill; HB 5126, funding for bike lanes and sidewalks in West Haven; SB 103 and HB 5246, single file riding; 5966, Fees in lieu of sidewalk construction; Distracted Driving Enforcement Bills HB 5248, HB 5545, HB 5550 and SB 637; Letter to Governor on Integrating Bike Commute Facilities with Agency Consolidations in Hartford; Comments on transportation component of DEEP Energy Strategy; Flower Street Closure.
3. Created bill watchlist, tracking, prioritizing and publicizing bills that relate to our mission.

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4. Inserted BWCT in a critical visioning process with DOT after BWCT was initially excluded in a meeting with other leading advocates.
5. Began participating in Bike /Ped Advisory Board, forming alliance with BPAB chair
6. Applied for appointment to BPAB
7. Continued to promote primary legislative priority: VU bill, with testimony and collaboration with other advocates.
8. Promote advocacy work on News page, Advocacy page and in newsletters.
9. Solicited and packaged member testimony to Transportation Committee on VU bill, sidewalk bill, and single file rider bills.
10. Formed advocacy committee.
11. Identified need for more clarity as between advocacy, communications, outreach.
12. At suggestion of DEEP policy director, wrote testimony on transportation section of DEEP comprehensive energy strategy, opening door to strategic alliance w DEEP commissioner & staff
13. Identified need for Hartford to have a bike/ped task force, given plans on the horizon for IQuilt and Intermodal Triangle re-configurations, as well as upcoming Bike/Park connectivity plan.

Recommended Next Steps

1. Continue to refine role of Advocacy Committee, addressing state, federal and municipal level advocacy as they are traditionally defined.
2. Make ourselves “top of mind” and the go-to organization for legislators and top state officials on bike/ped issues.
3. Determine how to address local grassroots efforts; determine our capacity to deliver community organizing assistance.
4. Continue to actively monitor legislative and administrative developments and weigh in publicly on them.
5. Hold one or two initial meetings to help get a Hartford bike/ped task force off the ground while critical decisions and momentum are underway for our capital city. This cannot be a missed opportunity.
6. Ensure that staff time allocated to advocacy is consistent with the way we present ourselves to members and the public.
7. Heavily promote our advocacy efforts and results as a means to build membership.
8. Take a much stronger role in advocating for walkable neighborhoods and safe routes to schools to ensure that the “walk” part of our mission is better addressed.

Annual Dinner & Silent Auction

Initial Assessment

There’s a solid team in place that knows how to run the auction. We would be wise to start some succession planning in this area and have someone work under Bev’s guidance.

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Accomplishments

1. Secured Dan Esty as featured speaker, which has turned into a very promising partnership
2. Provided publicity for dinner; with board's recruiting efforts attendance was at capacity
3. Net revenue from the dinner and silent auction approximated the net revenue from Discover Hartford

Next steps

1. Help Annual Dinner chair start planning early
2. Help brainstorm on ways to make this endeavor even more profitable
3. Review and share notes from what went well and what to change, then publicize and otherwise stay out of the way!

Bike Education

Initial Assessment

It took a while to get a sense of what the bike education program had entailed when there was a part-time staff person dedicated to it. Two board members in particular were dedicated to keeping some semblance of a bike education program going, and did a good job of better pricing those services. The apparent market demand for various forms of bike ed services seems to substantiate continuing that program. There may be a business case for shifting more staff resources to bike education and away from other initiatives.

Accomplishments

1. BWCT has had some achievements in the bike education category, but I cannot take credit for them. Primarily through MaryEllen and Sandy, BWCT has created a framework for TS 101 programs to be delivered at BWCT offices. Sandy and MaryEllen have recruited LCI instructors for each program.
2. My support of this program has included:
 - developing the online registration system and publicity for these classes,
 - integrating an electronic waiver of liability into the online registration system;
 - serving as the intermediary between LCIs and the treasurer on invoices for payment; and
 - collaborating on an updated contract and waivers for loaning out BWCT bikes and trailer.
 - Through the extensive efforts of MaryEllen, Sandy and Tony Cherolis, an LCI training program is being coordinated for May 2013. Increasing our supply of LCIs should make it a little easier to recruit instructors for ad hoc bike ed programs.

Recommended Next Steps

1. As part of the revenue development plan, the market for bike education programs should be given high consideration as there seems to be considerable interest for adult and child bike

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education programs. The obstacle has been our capacity to respond to requests and recruit instructors on an ad hoc basis.

2. As part of the revenue development plan, we should give ample consideration to prospective funders for a multi-year bike education program, along with a mechanism for individual donors to earmark donations specifically for bike education.
3. Set and publicize fees for bike loan program.
4. Recruit a committed successor to MaryEllen as Bike Ed Committee chair.

Bike to Work Day

Initial Assessment

The Bike to Work Committee is the organization's largest committee with many dedicated member and non-member volunteers. Bike to Work day planning was at the forefront of the agenda when I joined the organization last April, so I had a lot to absorb right off the bat.

Accomplishments

1. While I provided publicity for Bike to Work Day, the success of last year's event is largely owed to Sandy and her committee.
2. Public opinion seemed to be that our publicity for Bike to Work Day was better and more widespread than in previous years.
3. Played a pivotal role in engaging state government in Bike to Work day this year, planting the seed for bike commuting in our testimony on DEEP's energy strategy.
4. Leveraged my previous relationships with DEEP commissioner and communications staff to support their efforts to spearhead bike to work day participation throughout state government.

Next steps

1. Continue to leverage DEEP commissioner's commitment to active transportation at every opportunity. Considering the number of people who work in state government, getting state government to support active transportation in a serious way could create a tipping point for active transportation in Connecticut.
2. Continue working with small group to promote 2013 Bike to Work Day, creating registration systems for state government and other employees.
3. Promote Bike to Work Day more strategically to businesses.
4. Use Bike to Work Day registrants as a way to build membership and engage more people in active transportation on a more regular basis.

Communications

Initial Assessment

The website and newsletter communications were actively managed by highly dedicated volunteers who were struggling with a difficult website platform. Website navigation and design needed improvement. Content was sometimes inconsistent across pages. Newsletter design could be cleaner and easier to read. A variety of domain names and email accounts became apparent throughout the year. It was important for administrative, expense, and brand awareness purposes to stick with one domain name.

Accomplishments

1. Redesigned website and moved webhosting to new, user-friendly, inexpensive, account. Annual cost is less than \$50, an extensive savings of the \$1500 that was originally budgeted for website maintenance and design. Current costs are 3% of what the group had previously budgeted.
2. Integrated contact information collected in prior years events into constant contact
3. Absorbed newsletter creation and publishing responsibilities.
4. Created blog-style News page, integrating it with the newsletter. Newsletters now include a short excerpt of and link to the full article on our News page. This maintains consistency between our newsletter and website, makes for shorter, easier to read newsletters.
5. Invited previous communications committee to contribute to website, offered to teach them how to use site
6. Seeking communications intern to help with various functions. Approached Trinity, University of Hartford, UConn so far.
7. To preserve and project a unified, professional image, am working with Communications Committee to establish design standards for other committees to use for BWCT materials and logo so our public image remains consistent and professional.

Recommended Next Steps

1. Develop resource-appropriate communications goals and objectives, with timelines as part of our strategic plan. Monitor and report on progress and constraints at each board meeting.
2. Work with Communications Committee to better define our audience(s) and frame our messaging accordingly, the ultimate goal being to build paid business and individual membership and business sponsors
3. Develop a simple but effective organizational Annual Report as a promotional tool to bolster the case for membership and sponsorships
4. Seek pro bono PR firm assistance
5. Recruit a skilled intern to help with communications functions

Discover Hartford

Initial Assessment

A handful of highly dedicated volunteers invest an extraordinary amount of time into various aspects of the tour. There are many moving parts inherent in running the Discover Hartford Bicycle Tour. Planning it is highly labor intensive. The tour's success is weather-dependent. Having an effective media sponsor is critical. Securing corporate sponsors is difficult in the current economy. Partnering with EnvisionFest is essential; otherwise the risk of losing revenue is too high.

Accomplishments

1. Served as project manager for Discover Hartford Bicycle Tour, resulting in this year's event being regarded as the best run to date. Unfortunately, several days of poor weather leading up to the event, and the absence of a media sponsor, resulted in disappointing participation levels.
2. Instituted collaborative document-sharing. Documented tasks and timelines in shared folder on Google drive. Absence of electronic records or project plan with tasks and timelines was a major obstacle to efficient project management. Hard copy in binders doesn't lend itself to easy or efficient replication.
3. Conducted post-event debriefing, recording what to do (and what not to do) for the next such event
4. Designed and conducted post event survey, getting exceptionally high response rate and positive feedback
5. Provided detailed report of registrations, participants, revenue, expenses and cost of staff project management time
6. Replaced the expensive event registration system previously used (Active.com?) with the flat fee event registration system on Constant Contact (15/month for 2 months) resulting in considerable savings and integrated contact lists

Next Steps

1. We should ask ourselves every year if this event is supported by a solid business case.
2. Recruit a competent volunteer to manage this project.
3. Considering the staff time required to manage this project (260 hours), this project yielded only 5-6K net revenue. Because it is so labor intensive, there are significant opportunity costs to using staff as the project manager for this program. It may be that this is BWCT's signature event, but if there's insufficient return on our investment of time, we need to be realistic about whether we can truly afford to continue this event. Recruiting a highly competent volunteer project manager would strengthen the business case for proceeding with this event.

Membership & Revenue Development

Initial Assessment

Revenue projections built into the budget and revenue goals in the strategic plan had no “home.” There was no work plan or committee charged with accomplishing those goals. Understandably, it wasn’t apparent that many on the board were eager to delve into the business end of organizational development. Forty percent of the ED’s time was intended to be dedicated to fundraising, including fundraising events such as Discover Hartford. However, in practice, project management, administration and other unanticipated duties leave no time to pursue new revenue streams.

Accomplishments

1. Recognized the need for membership and revenue development issues to be addressed and consequently formed this committee as part of the strategic planning process.
2. Developed accurate list of current members, by membership level. The organization lacked this when I came on board.
3. Brought consistency to membership definitions as used in newsletter, on the print membership form, and on the website.
4. Set up auto-renew system for membership payments by credit card; integrated into website.
5. Integrated membership and revenue development into strategic plan; proposed initial goals and measurable objectives for this committee.
6. Currently reviewing member management software solutions
7. Currently discussing options for a business membership structure with committee.
8. Beginning to exploring other revenue development ideas with committee.

Recommended Next Steps

1. Work with committee to quickly resolve business membership structure
2. Work with Communications Committee and pro bono PR advisor to define and expand our “value proposition” – what are the benefits of business and individual membership?
3. **Build a realistic revenue development plan, with measurable goals and timeframes, that assesses the market for our work. Consult good resources like Peter Drucker, McKinsey, Balanced Scorecard in defining: Who is our customer? What does the customer value? What are our results? What is our plan? Does our plan realistically consider our resources?**

Nominating Committee

Initial Assessment

There are more recruiting efforts going on behind the scenes than is immediately apparent. Recruiting from across the state is difficult.

Accomplishments

1. Developed board profile grid

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2. Proposed plan for recruiting based on geography and population centers, focusing on expanding our reach to include public health, schools and walking proponents
3. Arranged an upcoming meeting with DPH

Next steps

1. Collaborate with Nominating Committee on recruiting strategy and new board candidates
2. Pursue public health contacts I hope to get through DPH
3. Arrange meeting with DECD and tourism officials
4. Investigate board recruits from the state's larger businesses

Outreach

Initial Assessment

Outreach requests are quite frequent and varied. Handling the correspondence is labor-intensive, as is the volunteer recruitment process. Time requirements for actually carrying out the requests are substantial, while the benefits are difficult to quantify making for a difficult cost-benefit analysis for outreach work. Admittedly, "outreach" needs more definition. I am thinking of outreach as including tabling requests for fairs and speaking engagements.

Accomplishments

1. Formed Outreach Committee to help vet and organize requests for our presence
2. Developed online forms for volunteers and ambassadors (tabling volunteers)
3. Identified need to reach out to other parts of the state to reduce the impression that Bike Walk CT remains very Hartford-centric
4. Orchestrated bike/ped focused Green Drinks in Fairfield with other area bike/ped groups
5. Provide occasional publicity assistance and advice to Merritt Parkway Trail organizers
6. Provide publicity for public meetings on bike/ped and trails related issues
7. Helped solicit volunteers to weigh in on plan for bike ped access to Putnam Bridge access
8. Assisted CT NEMBA with loan of bikes and trailer for Sporting Day for Youth event in Hartford
9. Addressed Torrington Rotary, UConn Waterbury class, New Haven community housing coalition, participated in a HYPE program at Old State House, Hartford "hospitality" representatives (from arts and culture groups), DEEP Bike Friendly Business award ceremony.
10. Offered website subdomains to Merritt Parkway Trail organizers, New Milford River Trail organizer (Tom)
11. Arranged for surplus helmets to be donated to CMCC for bike safety programs
12. Maintain loose connections with DOT Safe Routes to School program
13. Recently needed to resort to using Outreach Committee members to help vet and respond to incoming tabling requests

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Next steps

1. Significantly boost outreach efforts to businesses, parents, teachers and schools, public health community, tourism community.
2. Work with outreach committee to refine the scope of its work and develop a method for evaluating and measuring the benefit to us of participating in tabling and other outreach requests.
3. For future tabling events, consider collecting names and valid email addresses for our distribution list and entering those names in a drawing for a bike/ped related prize.
4. If appropriate given our current capacity and competing priorities, recruit a volunteer .coordinator and ensure that volunteers get appropriate training and support on how to represent Bike Walk CT.

Summit

Initial Assessment

We did not hold a summit in 2012, and my role in planning our upcoming summit has been minimal to date. This year's summit planning team has been highly effective at quickly pulling together an interesting program and speakers. Registration fees are too low. The people who complain about the rates being too high weren't the ones to take advantage of early bird discounts. As is usually the case with nonprofit conferences, finding a suitable venue for low or no cost is an obstacle. There are time-management challenges inherent in providing publicity and registration support for the summit while the legislature is in session, Bike to Work planning is going on at the same time, and outreach requests are mounting for spring and summer.

Accomplishments

1. Using Constant Contact event module, with PayPal, for registration simplifies the administrative burdens of registration and reduces our costs considerably.
2. Publicized the conference in newsletters and on website.

Next steps

1. Provide increased publicity in next few weeks to ensure that the summit is sold out or nearly so.
2. Work with summit committee to debrief and document what went well, what to change for next time.
3. Explore other venues that would allow for more exhibitors, and thus more revenue, and if feasible, budget for it in the next budget cycle.