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If only I had known then what I know now: How to create a statewide advocacy group for bicycling, walking, hiking, and trails in Kansas

This presentation was given October 18th, 2007, at the Kansas Built Environment and Trails Summit in Lawrence. The purpose of the presentation was to outline the steps necessary to bring a Kansas bicycling and walking federation into existence over the following year. Many of us who have been involved in bicycle, pedestrian, and trails issues in Kansas saw that the time was ripe for a statewide advocacy organization to be created.

Very little in this presentation is unique to Kansas, however. Almost all of what is outlined here applies to starting any bicycle/pedestrian advocacy organization--in any state or any city.

Our purpose today

Create the much-needed statewide Kansas Bicycle Advocacy organization

How-to: In this session I will talk about what needs to happen over the next year and how to do it

Meeting: Immediately after this session anyone interested in being a part of this effort will meet in an "affinity group" area during the reception.

- Choose **chair** or co-chairs
- Choose **12 organizing committee members**
- Take **contact info of supporters/helpers**
- **Finalize meeting schedule** for 6 meetings over the next year
- First formal organization **Establishment Meeting** and membership meeting at Trails Summit 1 yr from today to formally adopt name, mission, vision, goals, bylaws, board of directors, etc. (perhaps Saturday morning?)

Short history of the Missouri Bicycle Federation

Started in 1994. Issues: ISTEAs; statewide resistance to bike/ped accommodation and spending; lack of statewide bike/ped coordinator; mandatory sidepath law

Repealed sidepath law & improved bicycle regulations in MO traffic law; MoDOT bike/ped coordinator

Small, all-volunteer organization

Health problems of president led to organizational crisis in 2000

Revived 2002; hired lobbyist and passed bicycle safety legislation 2005

Since 2002, gone from \$50 to \$50,000 annual budget; 24 members to currently over 1200 direct members active in the past year and over 15,000 represented through our affiliated clubs and organizations

Missouri is on the "trailing edge" of bicycle/pedestrian accommodation; 50% to 65% of walking and bicycling of national average; lack of proper bike/ped accommodations is costing our economy far more than providing them would; in similar circumstances others have doubled bike/ped transportation in 10 years and increased 4-6-fold in 30 years

The situation in Kansas is probably similar or even a bit worse

Scope of a statewide advocacy group

PRIMARY: Develop relationships and work with key statewide groups/organizations

Legislature

State officials (governor, attorney general, etc.)

KDOT

Federal Highway Admin (KS office)

State parks department

Develop relationships and work with Kansas's national representatives

KS senators, representatives in U.S. Congress (National Bike Summit in March of each year)

Work to develop unity/cooperation/coordination among national/regional/state/local groups

League of American Bicyclists

State bicycle racing association

Similar organizations in neighboring states (MoBikeFed)

Trails groups

Bicycle, running, walking, hiking clubs

Overall goal for 1 year from today

Establish viable advocacy organization with

people/relationships/processes/procedures/plans in place

Funding plan in place based on the advocacy org funding triad:

1. 33% membership/donations
2. 33% grants (mostly gov't grants or other gov't funding; 5% private foundation grants)
3. 33% events

For financial stability, keep a balance among the three.

First year we will concentrate on large private donations of \$500-\$1000 or more (easiest/quickest of the 3; gets org off to good start and also sustainable in the long term)

Thinking long-term we will set up procedures/processes/groundwork to bring all 3 funding sources online as quickly as possible after the Establishment Meeting

Full time executive director position (hire by meeting or by end of year 2008)

Statewide advocacy organizations without full-time staff do not exist after 5 years

- a state is too large geographically

- there is too much work to be done to handle it all via volunteers

- in MoBikeFed right now we find about half the work done by staff/half by volunteers (40 hours/wk staff; 40 hours/wk board)

- paid staff gives stability and a center of focus to the organization

- staff's first item on job description is "raise own salary"

The two vital and irreplaceable pieces of advice:

Join the Thunderhead Alliance (thunderheadalliance.org); USE their advice and models
Make small, bite-sized, very well-defined jobs for your board members & other volunteers

WHO is needed as part of organizing committee and WHAT will they need to do?

Chair and Vice-Chair: Organize meetings

Budget: \$600 (meeting place rental; snacks etc for meetings; occasional expenses; can be partly or mostly in-kind or donated spaces)

Finalize meeting locations, dates, times

Publicize meetings/remind committee members about meetings (email)

Create agenda for meetings

Run meetings; keep on schedule & on topic

Most work will be done by subcommittees

Most of general meeting then consists of

Report of subcommittee 5-10 minutes

Discussion of the FEW topics/questions from that subcommittee where general input or decision is needed

Ideally chair will serve for one or two years; vice-chair then move to chair position
(depending on by-laws decision!)

Secretary

Take meeting minutes, including action items

Send minutes to committee members (email) within a week

Make any corrections

Keep permanent record of all minutes (institutional memory)

Keep track of action items complete/incomplete

Remind committee members periodically of un-finished action items (email)

Treasurer & treasury subcommittee

Budget: \$250 (quickbooks software; establishing bank acc; purchasing checks; incidentals)

For Treasurer: Accounting or treasurer experience recommended

Establish bank account

Take & track donations; make any needed payments

Establish system/protocols/approvals needed for making payments

Establish system for tracking funds (income, payments, etc.; Quickbooks or similar recommended)

Create & maintain budget

Fund raising chair & subcommittee (including membership chair)

Budget: \$250 (assuming 2 mailings to 200 people)

Strongly suggest "Founding donor campaign" model

100 "Founding Donors" at \$88/month or \$45/month (\$1000 or \$500 per year)
Mainly recruited through person contact or personal phone calls, perhaps supplemented with a direct mailing or two, which is then followed up with phone call/personal visit
Will raise about \$70,000 for first year operations/hiring Executive Director
These will almost all be personal friends/contacts of organizing committee members
These people become part of prestigious "Statewide Advisory Board"
Clubs/organizations/businesses also
Other special/exclusive benefit/gift for donating at this level--special jersey, signed poster, etc.

\$60 per \$1000 donor & \$30 per \$5000 donor is built into budget to purchase these items

Work with webmaster to develop online payment system to accept online monthly payments (PayPal)

Overall goal is raise necessary operating funds with minimum of work/time

Rule of thumb: 20% of contributors will contribute 80% of funds

The 80% of contributors who contribute 20% of funds will take 80% of your work/time

Membership chair (working in cooperation with Fund Raising chair/subcommittee)

General membership (\$25 level with goal of hundreds/thousands of members)

Having large membership/supporter base is vitally necessary to an advocacy organization

Large membership takes tremendous time/work/organization

Subtracting out major donors, and counting time needed to recruit/service/retain members, membership is a break-even proposition

Therefore no memberships will be accepted during initial year; will launch at Establishment Meeting

Will *prepare* for membership drive starting after Establishment Meeting; will not accept memberships for now

Develop contact list/membership database; start adding all contacts to it

Encourage people to sign on as supporters via the web site

Develop relationships with clubs/groups to be able to send membership invitations to their members after Establishment Meeting (national, state, local groups--Adventure Cycling, BikeLeague, etc. You will need your own supporter list to leverage this.)

Recruit contacts to join supporter email list/monthly email newsletter list (these contacts become membership base starting Nov 2008)

Develop membership pricing model

Prepare membership brochure & other needed recruitment materials (Thunderhead & MoBikeFed models)

With webmaster, prepare online membership recruitment page & payment system for launch at Establishment Meeting

With Fund Raising Chair & Treasurer, develop system for membership acknowledgement & receipts

Mission chair & subcommittee: Develop a unified vision

Participatory process with subcommittee, organizing committee, supporters/citizens to develop

Organization Name

Mission statement

Vision

Goals

Potential project list

As important as the work product is the development of a *unified vision* among committee members, supporting organizations, and individual supporters of what this advocacy group is all about (advocacy is about *human relationships*)

Incorporation chair & subcommittee

Budget: \$400 (KS incorporation fee; 501c3 application cost;)

Establish as KS nonprofit corporation (or transfer KANBike registration & amend as necessary)

Apply for & establish 501c3 designation (with "H election) with IRS

Write/edit proposed bylaws

MoBikeFed & Thunderhead have model paperwork

501c3 status is *necessary* for fund raising, grant applications, etc.

501c3 application is routine & process can be complete within 3-4 months

Bylaws will be formally adopted at Establishment meeting but can be used as provisional operating procedures in the meanwhile

Website Chair & subcommittee (including Email Chair)

Budget: \$150 (website registration & hosting)

Simple website for now:

What's going on this year

Organizing & board & contact info

Email list info & sign-up

Sign-up and contact info collection for supporters (name, address, phone, email, etc.)

(may be part of sign-up process for montly email-newsletter-"check here to join our monthly email newsletter list")

(be sure to include opt-out for contact info sharing--ask Brent for details)

Founding donor campaign contribution form

Easily updateable blog-style "news" page for organization: upcoming meetings, developments, announcements, etc.

More complete web site to launch at Establishment Meeting:

Membership info/donation page

News, advocacy info, laws, contact info, or other as decided by subcommittee (see models like MoBikeFed.org & other statewide advocacy org web pages)

Strongly suggest "blog" or "article" type interface like blogger, WordPress, Joomla, so that ordinary people/board members can be recruited to submit regularly updated content/news/announcements/etc.

Email Chair

Suggest creating 4 email lists:

1. Organizing committee (board) (goal: 14 subscribers) (suggest creating "kanbike-board@yahoo.com")
2. General membership/supporter "chat" for discussion, debate, & announcements (goal: 100-200 subscribers) (suggest using existing kanbike@yahoo.com)

3. Monthly email newsletter & advocacy alerts (goal: thousands of subscribers)
4. Political/staff/elected official contact list (goal: hundreds of subscribers)

Put people on #1

Recruit/encourage people to join #2, #3

Put people on #4 (they will get monthly email newsletter as appropriate)

Write & send monthly email newsletter (can be very simple, especially at first)

Join all known bicycling, walking, running, hiking, trails email discussion groups across the state

Disseminate the monthly email news to these groups (with an invitation to join the distribution list & get your own personal copy)

Work with website chair about how to establish/run email lists. MoBikeFed has ideas/resources/software.

Event Planning chair & subcommittee

Your first event will be the Establishment Meeting

Work with chair/committee to make this a real "event" and possibly fund raiser, beyond just a simple membership meeting

Beyond the Establishment Meeting

Brainstorm possible events to help support the organization

Later in the year, decide whether the organization is ready to go forward with an event.

If so, choose an event and start planning it.

Typical event requires one year lead/planning time

Typical advocacy org events: bike ride, run, trail event, fund raising/awards dinner

See MoBikeFed & Thunderhead.org for further info/help

Executive Director Search chair & subcommittee

Develop procedures to advertise & hire executive director

Conduct search

Interview candidates (email/phone/in person)

Make hiring recommendation & take to board

Research contracts & personnel policies needed

suggest hiring as independent contractor at first; then move towards staff/with benefits if the relationship works out

Thunderheadalliance.org and MoBikeFed are resources