

THE BASICS OF BICYCLE ADVOCACY

Establish Goals

What are the issues that you want to address? Do they involve facility accommodations, safety, or ridership? Clearly define goals and then develop a coordinated approach toward realization.

Understand the Process

A successful approach to advocacy is similar to doing a home improvement project in that you should understand the steps necessary for success before you begin work. Well-coordinated efforts will save time and resources. Answer questions like how, when and who is making the decisions affecting your goals. What are the timeframes? Which levels of government have oversight and influence over your priorities? Under what conditions do various levels of government work?

Identify the Decision Makers

Become familiar with the officials who have oversight over projects that affect your locality. It is important to understand that you will have several avenues through which to generate support. While you may find roadblocks in some areas, you will discover opportunities in others. Examine every potential resource and get to know the players.

Organizational Framework

Does an organization already exist that can address your goals, or do you need to establish an organization to focus on relevant issues? There is the advantage of working with an established group because you will not have to spend resources developing an organization. However, some clubs and organizations may not want to address issues you find important. In those cases it is necessary to create a new advocacy organization to work toward realization of these goals.

Build Constituency

It is important to generate a network of individuals who share your goals. Politicians react to constituent interests. If you generate a network of people who lend support to your goals, you will be much more successful than acting as an individual, no matter how worthy your project may be.

Timing

It is important to understand not only how the political process works, but also when it works. You have to know when opportunities will arise, and time your efforts accordingly. Most legislative bodies have established schedules. Know things like when and where your local Metropolitan Planning Organization (MPO) meets and when relevant committees of your local, state and federal governments meet.

Allies and Adversaries

A successful advocate will have a sound understanding of potential allies and adversaries. You should work together, where appropriate, with groups that support your goals. Adversaries must be

recognized. It is important to try to best appreciate the point of view of potential opponents. Work to appease objections where possible.

Get Busy

It is easy to complain about a lack of facilities or a hazardous intersection, but making a difference is the real challenge. Your incentive for change must be harnessed with a well-coordinated effort. Making a difference in your community will not be easy, but your success will be worth the effort.

FORMING, SUSTAINING & GROWING A BICYCLE ADVOCACY ORGANIZATION

Define the Purpose of the Organization

What are the issues the organization wants to tackle?

What do you need to get the job done?

To start a successful bicycle advocacy organization, you need the following:

- o a clear, agreed-upon mission statement
- o a strong, competent executive director
- o a dynamic board of directors
- o an organization-wide commitment to fundraising

Develop Your Board of Directors

What is the role of the Board of Directors?

Duties of the Board of Directors include the following:

- o selecting the Executive Director
- o assessing his or her performance
- o reviewing and authorizing goals and direction
- o ensuring compliance with legal and contract requirements
- o evaluating the organization's work
- o developing resources through fundraising and membership development

Create Bylaws

What is the purpose of bylaws? What should they include?

Bylaws – the operating rule of the organization – should be drafted and approved by the board early in the organization's development. Seek an attorney experienced in non-profit law for help. Key sections should include the following:

- o Membership - its composition, how/when membership meetings occur, special events
- o Board of Directors - election process, meetings, length of term, officers, committees

- o Financial Management - fiscal year, dues
- o Amendments - how to amend Bylaws

Develop a Strategic Plan

What is involved in developing a strategic plan?

Steps to develop a strategic plan should include the following:

- o Formulate the advocacy organization's mission statement considering the short term and long term issues the organization aims to tackle. Do some of those issues include facilities, safety and education, and/or increased government relations? How do you accomplish these goals? Who are the beneficiaries of your work?
- o Develop a strategy to achieve the mission. Make a list of critical issues that demand a response from the organization, prioritizing the most important issues.
- o Create a structure for the organization that will successfully use its resources to carry out this strategy.

Develop Membership and Retention Strategies

How should an organization acquire new members? How does it keep them?

For a successful membership campaign, you need the following elements:

- o a positive attitude toward direct mail, the only way to significantly grow your donor base
- o a compelling recruitment package, including a carrier envelope, a personalized 4-page letter that's easy to read, a reply form, and a return address envelope
- o a source of good mailing lists by asking board members and volunteers to give names and addresses of those whom they think might want to become involved, by trading lists for one-time use with similar organizations, renting/exchanging lists from other organizations in your area, and renting local portions of national lists which support causes similar to what your group does.
- o a systematic way to test what motivates donors to give money to your cause, such as which lists you are mailing and the price you are asking
- o a reasonable budget. Most organizations budget to make no profit from new membership acquisition through direct mail. In fact, most organizations budget to lose money on acquisition.

Answer the following questions to determine how much money you should budget to lose in acquisition:

what does it cost you now to acquire a new member?

how much does the average member give over three years?

what is the average number of gifts per member each year?

how much is the average gift?

what is the average number of total gifts per member's lifetime?

what does it cost to maintain your member?

how many members do you want next year?

is the answer to the first question too low?

For a successful retention campaign, you need the following elements:

- o a 1-page renewal letter that reminds members that their membership is about to expire
- o a 1-page renewal letter that reminds members of their benefits
- o a 1-page renewal letter that reminds members of their previous gifts
- o a mailing schedule of 5-9 mailings that include those letters set 5-8 weeks apart

Don't Be Afraid to Ask for Money

Why do people give money to an organization? What are ways I can use to bring money into this organization?

Some of the reasons people give to organizations consist of the following:

- o feels good
- o 'gives back' to society
- o admires the organization asking for the money
- o believes in the cause
- o gets something in return for the money
- o receives a tax-deduction for a 501(c)(3) organization
- o is generous
- o knows the money will be well used

Some different ways to raise funds consist of the following:

- o direct mail
- o members of the Board of Directors
- o major donor programs
- o planned giving programs
- o grants from foundations
- o corporate sponsorships
- o government grants
- o special bicycling events

- o employer matching gift programs
- o join a friend campaign
- o stocks and mutual funds
- o online

Establish Financial Management

How do I instill sound financial management in my organization?

The following are ways to establish sound financial management within your organization:

- o Keep good records. Establish a record keeping system for the organization's official records including corporate documents, board meeting minutes, financial reports, other official records that must be preserved for the life of the organization.
 - o Find someone with expertise. Hire a CPA with experience in non-profit financial management to establish an accounting system that meets both current and anticipated needs.
 - o Prepare a budget. Important steps in budgeting include the following:
 - reviewing program and management achievements and fiscal performance over the year ending
 - reviewing objectives achieved
 - comparing budget to actual figures
 - looking at the number of people served in each program
 - estimating the costs required to achieve your objectives, including staff, supplies, and other resources.
 - estimating revenues with some degree of accuracy based on past experience
 - comparing and balancing revenue and expense projections
- Perform an audit. Have your CPA test the accuracy and completeness of information presented in an organization's financial statements. Some nonprofits are legally required to obtain audits.
- Charitable Registration Requirements. You should contact the Secretary of State or Office of the Attorney General for regulations in those states where you raise money.

Obtain a Federal ID Number and Get Non-Profit Status

File for an IRS determination of federal tax exempt status, 501(c)(3) or 501(c)(4). To apply for recognition of tax exempt status, obtain form 1023 (application) and publication 557 (detailed instructions) from the local Internal Revenue Services office.

File for state and local tax exemptions in accordance with state, county, and municipal law. Apply for exemption from income, sales, and property taxes.

Obtain a Federal Employer Identification Number (EIN) by filing an "Application for Federal Employer Identification Number," (form SS-4) with the Federal Internal Revenue Service.

File articles of incorporation. Each state has its own regulation and procedures for doing so; your state's Secretary of State Office has all of the necessary documents for this procedure.

Other legal matter you may want to consider doing at this time:

- o Register with the state unemployment insurance bureau
- o Apply for a nonprofit mailing permit from the US Postal Service

Purchase Insurance and Manage Risk

What kind of insurance should I buy? What should I do if an accident occurs during an event?

Typical bicycling advocacy organization policy includes the following coverages:

- o General Liability
- o Participant Accident
- o Non-Owned/Hired Auto Liability
- o Workers' Compensation/Employers' Liability
- o Property/Electronic Data Processing/Crime
- o Directors and Officers Coverage

If/when an accident occurs at one of your bicycling events, you should take the following steps:

- o Seek appropriate medical attention immediately
- o Designate a spokesperson and direct all inquiries to that person
- o Record names and telephone numbers of witnesses
- o Document what occurred including the name, injury, how it happened and the actions taken in response
- o Report the incident to your insurer

Start a Volunteer Program

How can you solicit help from volunteers?

Follow these steps to start a successful volunteer program:

- o Assess all current program needs and create a list of volunteer opportunities
- o Write job descriptions for each of these opportunities, stating the following:
 - dates and time commitment

what needs to be done, as well as what skills, resources, knowledge or abilities that would be helpful

number of volunteers

location and the resources needed for the project

benefits for volunteers who choose to participate

- o Recruit members through newsletter ads, website listings, a hotline, announcements during events and rides, personal requests for member participation from those who have expressed interest in the past, e-mail announcements
- o Show appreciation by regularly recognizing volunteers in public and private ways. This may include a volunteer of the month column in the newsletter, a verbal or written "thank you," a certificate of appreciation, and/or a round of applause. You may consider taking a volunteer out for coffee or throwing an annual banquet that recognizes their efforts.

Note: Should I ever guilt someone into volunteering?

No. While it may be tempting at times, never twist someone's arm into doing a volunteer project. If volunteers feel forced to work on a project in which they are not interested, the chance they will return later is greatly reduced. Accept that people will decline when asked to volunteer for reasons they may not wish to share. Eventually they will participate when they are free to give of their time and talents.

Create a Technology Plan

What is a technology plan and how do I budget for it?

The following are elements to budget and plan for:

- o Hire an information technology (IT) consultant who will plan, implement and support all your IT needs.
- o Work with an Internet Service Provider to establish your domain name, website and email addresses, as well as your Internet connection.
- o Have a volunteer or someone on staff create and reliably maintain your website. If you don't have anyone, seek training for yourself. Frequent maintenance of your website is crucial.
- o Set up a secure server on your website to enable your organization to accept credit card donations over the Internet.
- o Establish a local area network (LAN). Even the smallest two-person office derives benefits from being on a network. Printing is easier, editing documents is easier and viewing and sharing data is greatly simplified.
Invest in your workstations.

- o Establish a back-up system. You never know when your mother board will decide to stop working for no apparent reason.
- o Find quality membership database/fundraising software. You will need to use this software for data entry, coding, indexing, sorting and queries, mail merges, generating reports, etc.
- o Some items to consider when purchasing database software are the following:
 - Total cost including software purchase price, user-licenses, data conversion, technical support, and staff training
 - Options you can use to code a member
 - Processes for importing/exporting data and performing mail merges
 - Search features using single or multiple criteria
 - Processes for indexing and segmenting any group of members
 - Capacities to capture, manage, and report data for special events
 - Ease of data entry
- o Find quality accounting software. The following factors often play an important role in the final selection of accounting software for nonprofits:
 - general ledger, detailing each transaction posted to each account
 - consolidated general ledger, not displaying detail
 - bank reconciliation format, showing monthly
 - receipts and disbursements
 - income and expense statements for each program and a consolidated statement of income and expenses for the year to date
 - balance sheet information for the organization
 - a budget to actual comparison for the organization
 - Ease of exporting data into spreadsheet software for more flexible reporting
 - Cost, noting the higher price you pay the more features you will receive -- the lower the cost, the more limited functions.
 - Capability to easily handle the payroll function, including W-2s and 1099s
 - Security features that prevent unauthorized personnel from accessing and/or manipulating data in the accounting system
 - Availability of technical support

Note: Can we keep the books on spreadsheet software?

This is not a good idea since there are so few controls for spreadsheet software. Numbers can be easily changed, damaging the integrity of financial reports.

CHOOSING ISSUES

Once you have an organization in place, it is important to carefully choose what issues to take on. Advocates must consider several things, including: the needs of bicyclists in your community; potential resources that can be tapped to meet such needs; the feasibility of realizing success; what efforts on the issue have taken place in the past; the political environment in which you will be working; potential pitfalls to pursuing various goals; and the costs of taking on issues.

Community Needs

Make a thorough assessment of what needs to be done in your community. Perhaps you may wish to study a "model community" and then assess what your community would have to do to realize the model's characteristics.

Potential Resources

Find out what has been done in the past in your community and what other communities have done to realize goals. Develop a thorough understanding of how your local, state and federal governmental entities contribute to the environment that you are trying to affect. Treat issues individually, and cater to specific issue needs.

Feasibility

Avoid taking on issues that lack feasibility. Your focus should be on a needs based approach, but keep in mind what is attainable. Taking on issues that are impossible to solve will be hard on group moral. Small, continuous steps in the right direction are more efficient than trying to leap ahead but failing to make progress.

Issue History

Examine prior efforts that have taken place in your community. If you are tackling something new, find out if there have been similar efforts elsewhere and learn from such efforts. While you can learn from examples, you can also adapt new techniques/approaches to your issue and possibly lead the way for others to follow.

Political Environment

Educate yourself as to the type of environment under which you will be working. It is essential to have an appreciation for constraints under which governmental entities operate. What is the budget environment? Is there a surplus or deficit? Is it a zero sum game where for all new spending there must be a cut in existing spending? Are there existing accounts that could be tapped to help solve your problem/issue? If it is a legal issue, is there precedent? Show that you have done your part by answering all the questions you can possible answer before meeting with officials. Exhaust existing opportunities before asking for something new. If existing programs are not working, make suggestions as to how to improve them instead of simply complaining that they do not work.

Potential Pitfalls

Before taking on a new issue, consider all of the possible ramifications. Will there be adverse reactions within the community. Build upon small victories.

Issue Costs

One must fully consider the cost of taking on various issues. How much time will be devoted to a particular issue? What are the costs of running the issue campaign, including hours of work, materials, and contracted work. Will a particular issue lead to other time consuming challenges that you may not want to take on? Consider the potential cost of realizing success on an issue that in the long run is deemed a failure. For instance, if you get a facility built that is underutilized, will your efforts undermine future facility enhancements?

ORGANIZING GROUPS

Establishment

Work within an established group or club where possible.

You can develop a group with no prior structure. This will require effort, but may be useful in that you can work with others to establish a focus on specific issues from the ground up. Begin by reaching out to individuals that you suspect share your vision.

Incentives

Keep your group focused by documenting efforts, successes and setbacks. The success of your group will be based on the incentives that drive participants. Always keep in mind what goals you are pursuing.

Group Structure and Issues

Recruit members that share your vision. Develop concise, reasonable mission statements that are representative of what your group is all about.

- o Develop feasible goals that are in keeping with the vision and mission of your objectives.
- o Focus on how to go about achieving your goals. Study the successes of groups that have had similar goals.
- o Create new approaches to set new standards.
- o Refine your group's vision, mission and goals.
- o Develop a plan that that uses realistic strategies. Be as specific as possible in your planning efforts.
- o Work on making your communication efforts as clear and concise as possible.
- o Set up well structured meetings. Fight against group complacency. Take full advantage of volunteer time.

ACQUIRING RESOURCES

Define Constituency

Any effective advocacy group has a well-defined constituency as its power base. You have to develop a significant group that you will represent. Your constituency will help support your organization both through financial and political support.

Leadership

Finding the right person who has the time, passion and ability to provide leadership is essential to successful advocacy. Employees of public entities like state and local transportation departments can perform leadership roles. However, if the resources are available to hire a professional staff member for your organization, this may well prove to be the most effective route. Employees of public entities are often limited by the confines of their working environment. Hiring someone to represent your organization will eliminate the conflict of interests often incurred by public employees.

Volunteers

Most advocacy organizations have very limited resources, especially during the initial stages after being founded. Finding individuals committed to your cause is essential. Volunteers are normally very committed and do not demand many resources, so finding them is an important step to developing a strong advocacy network.

Resource Efficiency

Take full advantage of whatever resources you have. If you lack office space, work out of home but act as if you have an office. Develop business cards, letterhead and dedicate a phone line for your organization. Print business cards for your key volunteers. Provide job titles for those who contribute to your mission. Look to provide contract work where appropriate. Can you offer expertise on safety related issues for your metropolitan planning organization? Consider things like project evaluation, safety studies, and materials, bike surveys and counts, planning and education materials. These are some areas you may be able to use your expertise to win contracts for work. Also, look to partner with other non-profit organizations where appropriate.

Events

Consider developing well-conceived and well-run cycling events to raise funds for your cause. Such events can also broaden your support network within the cycling community.

Contracts

Transportation agencies often have trouble acquiring necessary information about bicycling called for under the Transportation Equity Act of the 21st Century (TEA-21), providing government contract work for bicycling advocacy organizations. Consider project evaluation, safety studies and materials, bike surveys and counts, planning and education materials. Partnerships with other non-profits and consulting agencies should also be considered.

Maps

Developing bike maps for sale to the public can be a useful advocacy tool and fundraising technique. Free government sponsored maps can produce income if contracted to produce the material.

Future Possibilities

There may be more business consulting opportunities opening up if our mode is "mainstreamed." Bicycling may well have to deal with broader issues involving insurance, parking, employer/employee commuting issues and tax relief.

Coalition Building

Network where possible. It can be very useful to search for and align your organization with other groups that may share your vision. Look for opportunities to gain legal advice, increase your numbers, and get technical advice through partnerships with health or environmental organizations.

Fundraising

Tell businesses and foundations what you can do for them. How does your efforts help with their mission? It is important to sell things that your organization already does well so you can produce immediate results for the organizations providing needed financial support.

MARSHALLING YOUR RESOURCES

Utilize Skills

Understands what capabilities each of the players bring to the team environment and utilize skills accordingly. What members of your organization have law backgrounds? Do you have any politically connected members? If a project involves a safe-routes-to-school initiative, do you have any teachers or PTA representatives amongst membership? Use your committed members is the best way possible - in areas where they have experience and the ability to make a difference. Some other useful skills may include caterers, carpenters, accountants, computers, and writers.

Seek Contributions

It is often the case that members in your organization do not have enough time or financial resources to dedicate to your cause. But, these same members may still want to contribute more, and they can often do so by providing supplies like answering machines or an old computer. You may even be able to get office space through a member or member contact at very little cost. Seek out assistance. It is often out there waiting for you to find it.

Publicize Your Needs

Make a list of the things you need to run your organization and make the list known. Post it in the office and run the list in your newsletter. You may be surprised with how much you can get if you make it known.

Develop Partnerships

Will your cause be helped through a larger constituent base? If so, it is often helpful to seek partnerships with organizations that share your vision for particular goals. Is there a pedestrian rights group that may work with you to increase non-mechanized transportation alternatives?

Fund Raising

Do not underestimate the value that an effective advocacy organization provides its membership. While some members may complain about dues, do not sell your organization's efforts short. If your dues barely cover postage and costs associated for a newsletter, then it is difficult to justify spending resources on advocacy. You must balance dues with costs and services. Often the very people who complain about high dues will frequently be happy to make a special contribution in response to an appeal that relates to a specific interest or problem. Make clear to donors what it is your organization has done, what it is doing and what it will do in the future. This justifies your requests for continued support. Provide flexibility to members for giving various amounts to your organization.

WORKING WITH THE MEDIA

Newsworthiness

An important first step in working with the media is to assess whether or not your story is newsworthy. There may be issues very dear to you that do not resonate in the same way with a reporter. It may be to your advantage to wait for a major issue to come up before contacting a reporter for the first time. If you succeed in selling an issue that turns into a story, the second time around your credibility will help get you the next story.

Be specific

Reporters work from facts. Feed them information that generates the story. Consider counterpoints that might be used to undermine your positions to build your arguments.

Media List

Develop an extensive list of media outlets and personnel in your area.

Press Releases

This is the vehicle through which you sell your story to the press. Press releases should be concise, well written documents that ideally become the basis for articles by reporters. Provide pertinent information including the what, where, why and when of your story. You need to include the names of organizations of people involved with the issue.

Timing

It is essential to have a sense of timing with news releases. You have to get your release out so that the information will be picked up and printed by the media in a timely manner.

Content

Include the most important facts early in your press release. The media has limited space with which to work. Frequently not all of your press release will appear in print, so mention the most important details early in your release.

Photo opportunities

A picture or video clips often resonate well with the public and can be used to compliment your written press releases. A ribbon cutting ceremony, for example, with a supportive lawmaker or government employee is an effective way to recognize your partners in a project.

News Conferences

Use a news conference to convey important information to a group of reporters at once. Because you will take the time of reporters, news conferences must be associated with groundbreaking issues. Working relationships with reporters may be strained if you ask them to come to a press conference that does not live up the newsworthy criteria. When you have a news conference, supply visual and audio effects to project your story to television and radio, and a press release for all media.

WORKING WITH COMMUNITY LEADERS

Preparation

It is essential to make a good first impression when approaching community leaders. Be prepared, be friendly and have a positive attitude. Remember that you are one among many vying for their attention and support. If you do not pay respect to demands on their schedule and position, then they will likely choose to lend support to other causes.

Listening

Listen to what leaders have to say. If you gain understanding of the parameters under which they work, you will likely have a better chance at advancing your agenda to fit within such parameters.

Facilitating Working Relationships

Try to accommodate before getting accommodations. It is always advantageous to provide something before asking for something in return. For instance, instead of setting up a protest to raise the issue of poor facilities in your locality, ask the leaders responsible to take a tour of the facilities in question with your club. You can make a negative situation a positive one for those involved. Instead of bashing leadership, you can incorporate them in the solution and provide political cover for a history of neglect. Plus, if they agree to tour the facilities, you have engaged them in the process and have begun to hold them accountable.

Focus on the Big Picture

Know your issue inside and out, but begin by touting your ideas/plans through a general approach. Leaders are usually generalist types, with a working knowledge of many issues, but true expertise

in perhaps only a few. Prepare for detail, but sell your issue in general terms. If you are asked for detail, give it.

Honesty Is a Must

Never stretch the truth. If you are not sure about a question or issue raised, then admit it and promise to get back in touch with more information. Your credibility is a major part of your reputation. Never put it in jeopardy.

Always be Flexible

Politics is often a game of compromise. If you show the inability to meet halfway on an issue, you may likely get nothing instead of a considerable amount.

Be Aggressive, but Considerate

Ask for allot with the expectation that you wont get everything. If you don't ask, you will hardly ever receive.

Persistence Pays

Advocacy is like sales. Never give up. Don't be discouraged by people who tell you no, just be determined and find the people who share your goals, those that will say yes.

Focus Your Efforts

It is better to achieve small victories than to fight many battles with no beneficial outcomes. There are too many stories of groups who tried to do too much and ended up getting nothing accomplished. Narrow, specific focus is a good way to realize success.

Be Ambitious

While focusing on specifics is essential, it is important nonetheless to aim high. Have an organized strategy, but do not limit capabilities by selling your team short on expectations.