Cycle campaign toolkit: specification - summary – from CycleStreets, funded by GeoVation

Version 1, 18th July 2011

This document describes our plan to improve the effectiveness of cycling campaign groups by the creation of a user-friendly, web-based toolkit that will enable groups and their members to gather, discuss and make best use of knowledge about the problems faced by cyclists. It will help them to work productively to solve these problems, spreading best practice around the UK, and working where possible with Local Authorities to achieve this.

Comments are warmly welcomed.

Overview

The toolkit will be a dedicated website, free of charge to use.

It will be split into two main sections:

a) Reporting a problem: a section open to anyone

b) Managing and solving problems: for campaigners and groups, requiring a login

Firstly we present an example of how it could come in useful.

Example: Allowing two-way cycling in a one-way street

This example will discuss how a campaign was undertaken in 2007 to allow legal two-way cycling in what was a key one-way street.

Kingston Street, in Cambridge was a one-way, quiet residential street near the railway station. Cambridge Cycling Campaign, like other campaign groups, has a policy of opening up one-way streets to two-way cycling, in order to make cycle journeys quicker (and thereby more attractive, compared to the car) and safer (because this helps avoids busier roads).

It became clear that some local Councillors were against the proposal, pushed by residents who wished to preserve the status quo. In contrast, the cycling campaign took the view that there were objectively no real problems with allowing two-way cycling and that the benefits to cyclists would be very worthwhile.

A campaign was therefore initiated to change the status of the street. This campaign involved the following:

1) Setting up an e-mail list to help campaigners discuss the issue and collaborate

2) Assembling a case for the principle of two-way cycling, making clear the problems one-way streets cause and the benefits that would come from two-way cycling

3) Researching what current national policy exists for two-way cycling

4) Identifying evidence from similar changes elsewhere in Cambridge, including collecting photographs

5) Running an on-street petition and on the campaign's website and asking where people had cycled from on their journey through the street

6) Plotting the origins of each person's journey onto a map, which immediately demonstrated that two-way cycling here was a city-wide issue, rather than just being a purely local issue affecting only residents (and this was key to success of the campaign)

7) Encouraging members of the Cycling Campaign to write to their local councillor

8) Writing a letter to decision-makers in advance of a key public meeting where the decision was taken, presenting the national policy, the map of users of the street, and the overall case.

9) Publicising the whole issue and keeping people informed during and after the change.

The campaign was won. However, it took a lot of work, just for this single street. Four years on, there are many more streets that are still one-way.

Many of the above activities could have been automated or helped by a good toolkit:

1) An e-mail list could be automatically created if we already know who lives in the area (and therefore likely to be interested) or who has said they are interested in 'two-way cycling issues'

2) Researching national policy could be provided 'on a plate' since this is a common issue elsewhere in the UK and there are specific documents about it

3) Setting up an online petition is becoming easier

4) Converting postcode/address locations into a map format could be entirely automated, rather than each having to be plotted on the map manually

5) The process of encouraging people to write to local councillors could be improved by having key points available and identifying who the councillors are, based on where people live, and approaching Councillors only in the areas (and council committee) concerned

6) Publicising the issue could have been made much more easy, ideally avoiding the need for a particular 'webmaster' with special web knowledge to do this task.

We now look at how the toolkit will help with these.

Reporting a problem: a section open to anyone

This section of the website will enable people to report a cycling-related problem (or an example of good practice). This will be made as user-friendly and straightforward as possible. People will:

i. pinpoint the location on a map of the UK

ii. add a photo if they have one (which will be encouraged)

iii. add a quick one-line summary of the issue, any other details, and a category

Anyone (campaigners, members of the public, etc.) can submit problems.

Issues already submitted will be shown on the map, and people can 'thumb up' an issue and add comments. People can request to receive updates.

When a problem has been solved on-street, this will be shown.

Managing and solving problems: for campaigners and groups

This section of the website is intended for people interested in campaigning and working to solve the problems submitted. It is the larger of the two sections and it will contain many different facilities.

Each local campaign group will have its own area, i.e. its own customised toolkit, picking up the submitted problems in their geographical area only. It can be customised in the style of their main website, and have their logo etc. It can be fully-embedded in their site, with their own domain name if wished.

All discussions and so on will be private to their group (unless they decide otherwise) and managed in the way they want. It will be managed by the group's committee, who can control various settings.

The group's toolkit will be available to all its members (campaigners), though they can invite in others (e.g. residents association members etc.) perhaps for specific campaigns.

The sorts of activities that campaigners will do here are:

- Viewing submitted problems, either on a map or listing format
- Categorising and clarifying submitted problems
- Maintaining a gallery of best practice
- Discussing the issues amongst the group
- Adding/removing oneself from individual discussions
- Grouping issues together
- Prioritising the issues in a variety of ways, e.g. by importance, achievability, cost range, date, etc.
- Bringing into the discussion any best practice examples from elsewhere
- Adding in factual information into the discussion, e.g. a likely costing of some infrastructure, national guidance, etc.
- Marking good practice as something that might be of interest to other campaign groups elsewhere in the UK
- Inviting in other people, e.g. local residents, Local Authority officials, if wished. (Often these are external people who have extensive local or technical knowledge.)
- Setting up meetings, petitions
- Drafting letters, blog posts and other resources
- Publishing issues (i.e. informing the public) in a variety of ways

These and more are given in more detail below.

A one-stop-shop for campaigning

Cycle campaigners deal with a whole range of issues, so an aim of the toolkit is to try to bring these together into a ‘one-stop-shop’ for managing them.

So the toolkit will:

- Provide a central way for anyone to submit a problem, as mentioned above

- Provide a central way for campaigners to manage, discuss and campaign on problems.
- Bring in locations of planning applications, and showing these as issues to be looked at, displayed on the toolkit's map automatically
- Let people browse and interact with best practice from around the UK
- If wished, enable the group's public e-mail address to be automatically linked with the system so that incoming e-mails can be turned into problems on the map in the same way
- Provide the ability to replace manually-managed e-mail lists with automatically-created e-mail discussions and online forums that include only people who have expressed an interest in each particular issue
- Import other sources of geographical data (e.g. a group may already have a database of cycle parking locations), again to show on the map
- Provide a way for issues to be published on an existing website easily and flexibly without the need for copying and pasting material

User registration

Campaigners will register a free account and will be attached to the campaign group they are a member of. They have to create a username, which will always visible in all their interactions with the website, but other details like name and e-mail will be kept private unless they want to show these. Groups can invite (effectively auto-register) their members.

When registering, they:

- Specify what kinds of issues they are most interested in campaigning on (e.g. "Cycle parking", "School cycle safety")
- Enter their home postcode and other locations they cycle around regularly
- Plot routes that they cycle through. (The CycleStreets journey planner will help them do this automatically, and they can then drag the line to correct incorrect bits of the route.)

The idea of adding these details is that, if someone proposes that a good-quality cycle lane needs to be added to a street, all the campaigners who cycle through that area will automatically get to know about that proposal. Because they cycle there, these campaigners are the people most likely interested in helping campaign to solve the problem.

Getting an overview of campaigning issues

Upon logging in, the user will be in the campaigning section of the website.

A campaigner will be able to:

- See all the issues of interest to them (other issues are kept out of the way, on another page)
- View issues on a map or in a forum-style text view
- Have their own listings of issues prioritised, in various ways
- Be able to discuss the issues, e.g. add replies and resources

For the map view:

- Locations will have different icons depending on the type of issue, e.g. cycle parking, obstructions, etc.), in a similar way to the current CycleStreets Photomap
- People can filter things, e.g. to show only cycle parking problems.
- Additional layers of information can also be shown if the information is available, e.g. cyclist collision data, cycle theft data, etc.

Every issue becomes a 'thread' – a discussion topic

Every submitted issue becomes a thread (discussion page), into which replies (views and facts) and resources (e.g. more pictures, guidance, best practice examples, even other related issues) can be added.

This is a similar concept to things like:

- An e-mail list, where an issue is raised (with the subject line being the title) and people reply, one-by-one, sometimes quoting previous text, and where people can attach pictures, documents when they reply
- Web forums, where each issue is an entry in the forum and people reply one after another

A thread is created automatically for every submitted issue, planning application, etc. I.e.:

- Every issue submitted (e.g. "Cycle parking needed here on York Street", "Removing the bollard near the entrance to the supermarket", "Creating a new route from Downing Street to York Road", "Changing rubbish cycle lanes on the Mill Street B-road to Dutch-style cycle tracks")
- Every thematic issue (e.g. "20mph zones", "Cycle parking", "Cycle lanes", "Helmets")
- Every non-geographical topic (e.g. "TfL's cycling strategy", "Committee meeting on 2nd July")
- Every planning application ("New school on York Road")
- Every other issue which makes its way into the system (e.g. imported cycle parking locations)

What threads (issues) does a person see when they log in?

People are automatically 'subscribed to' particular threads (issues), as follows:

- The thematic issues they specified when they registered with the website (e.g. "Cycle parking", "School cycle safety")
- Issues on or very near the places they cycle through or where they live/work
- Any other areas of the map they want to know about, e.g. perhaps a set of local streets
- Manually adding themselves into a thread, by 'ticking it'
- Adding a comment to a thread they are not currently subscribed to
- Being invited into a thread by another campaigner (i.e. an 'I think you should see this...' invitation), which they can chose to tick/respond to in order to subscribe
- High-profile issues that the Committee has flagged up

If the person is not interested in an issue that comes up, they can just untick it.

In summary, the result is that:

- People only get subscribed to what they've said they want to hear about, and nothing else
- Issues that get submitted automatically become available in their list of threads
- People can view/monitor other things being discussed without subscribing to them
- People can easily unsubscribe from an issue

How can threads (the issues) be accessed?

Campaigners can read and reply to their threads by either (or both) of these:

- Logging into the website, exactly like a forum
- E-mail, exactly like a normal e-mail list, if they enable this

For instance, if someone replies to a thread on the website, people who prefer to receive things by e-mail will see that reply coming in by e-mail, and vice-versa. People can also choose to do both, i.e. also log into the website.

Summary of information shown at the top of each thread

The top of the thread will have:

- An initial title (which is the summary that was originally submitted by the person reporting the issue).
- Optionally, a description, which is the description originally submitted
- The category, which will have a link to other issues in the same category (e.g. other cycle parking issues)
- A Google Street View display, to help people give context
- A button for subscribing or unsubscribing
- A button showing who else is subscribed to this thread
- The number of public thumbs-up, for information
- Prioritisation controls (see further details below, e.g. 'prioritise by importance to me')

Replying to a thread – advancing the discussion

A thread can have the following types of things added to it:

- Text replies, which will be very commonly done. (Previous text can also be easily quoted.)
- A photo
- An link to a online newspaper article or blog post
- A document (e.g. a link to a policy document). Documents will be encouraged to have structured data added so that they can be found more easily later.
- A general web link, which shall include a field for a description so that people know what they're about to click on

- An e-mail attached into the thread (e.g. a reply from an official that campaigners should be aware of).
- A new Google Street View location
- Information that is marked as 'Strictly private to the group' that should not be forwarded to outsiders. For instance, there could be known issues relating to land ownership or strategic issues with the council which would not be productive to broadcast.
- Additional comments coming in from the public side of the website
- An 'info block' (see fuller description below) which summarises a policy statement, e.g. national policy (e.g. "National policy on pedestrianised areas") with key quotes
- Campaigners can pull in examples of best practice related to the particular issue, from the best practice examples already in the system.For instance, if an issue regarded the need for cycle parking in a tight space, best-practice examples of solutions to that problem from elsewhere could be directly referenced by attaching that to the item, reducing the ability for decision-makers to claim "it can't done".
- An info block which outlines a likely set of costs for a type of infrastructure
- A pre-formatted invitation (e.g. "Someone please agree to draft a letter")
- Integration with an Ensembling document (www.ensembling.com is a system for enabling people to draft a document and enable other people to comment on it, iteratively producing drafts).
- A statement that a letter has been sent, and to whom, and attaching the letter itself.
- A proposed Campaign Objective (e.g. a solution like "Addition of a cycle lane" in response to a submitted problem like "Dangerous traffic here". These are designed to encourage action-orientated discussion. Two levels of objectives can be added: "Objective" and "Acceptable compromise". People can thumb these up or down (one vote per person), with the count shown.
- A deadline, together with a description (e.g. "Consultation deadline"). More than one deadline can be added, but users will be warned about other deadlines that are still forthcoming.
- Successful acheivement of a campaign objective, e.g. that the cycle parking location has been added.
- A photo which officially supersedes the original photo in depicting the new situation on the ground.
- Reference to a 'Case study' entry for the information of other groups.

As noted above, users can ignore the web-based forum-style thread view, and interact with threads via e-mail instead / as well. The intention here is that users who like to manage workload by e-mail can use the system as if it were a standard e-mail list.

Threads can be split into sub-issues.

Threads can also be joined together in a group of related issues (e.g. a set of issues resulting from construction of a new development).

Prioritising issues

An important feature of the toolkit is that issues can be prioritised in various ways. This is because there are often lots of issues to sort out in a city, but campaigners and councils obviously cannot tackle everything at once.

Prioritisation exists as a concept in three ways:

- Individual priority ("Importance to me: __"), not visible to other ordinary members, but which will be visible to Committee members
- Priority to the overall group, set by the Committee
- And additionally, a time-based view of deadlines

Changing the importance level can be set using a drag-and-drop style method.

Priority to the overall group is set by the Committee. In doing this, they will see each person's assessment of priority so that they can judge things, compiled as a score.

Search facility

A search facility, to find threads and information in them, and other things, will be available. It will be flexible, so the search will find matches in the title, comments and elsewhere.

The search will be accessible from the top of any page.

Deadline management

A key issue for an effective campaign group is ensuring that deadlines, both for transport scheme consultations and planning applications, are dealt with in time. Groups will be able to add key dates and schedule reminders to help them focus on important issues that are also urgent.

A time-based deadline view of threads will be available to all users.

Users can tick a deadline entry in a thread, to indicate that they wish to be notified about deadlines approaching. This 'Reminder' will appear as an indicator when they log in (and in the top 'My info' bar of the site) and can be set as an e-mail reminder.

Info blocks

Info blocks are widgets containing structured information which can be pulled into the discussion (literally dragged across the page, so it then appears as a thread reply). The idea of these is that they are reusable whenever an issue needs them. This avoids, every time, people having to re-research things.

Types of info block (each of which has its own template) available will initially be:

- Infrastructure solution
- National guidance
- Local policy document
- Case study outlining best practice on an issue
- An organisation (e.g. DfT, or a part of a council) and information about its structure
- Council officer

Dealing with disputes

Cycle campaigners sometimes deal with very divisive topics (e.g. 'helmets') and so heated disputes can occasionally arise. It is important that unproductive users do not drain enthusiasm of others.

The system will work on the basis of trying to encourage cordial and polite discussion, even where views are divergent.

A variety of means will be available to help the Committee of a group steer discussion back to productive and polite, outcome-focussed discussion.

Linking with a group's public e-mail address

Because an aim of the toolkit is to provide a 'one-stop-shop' for managing all areas of campaigning for a group, irrespective of how the problem has been reported, the toolkit can accept and process incoming e-mail from a group's public e-mail address(es) if a group wishes to enable this. To set this up, the group's e-mail account must allow mail to be forwarded to another address.

Incoming mail gets turned into a thread like any other.

However, these threads are treated as initially available to the Committee or specified members only. The recipients can migrate them to public threads ('Set as normal thread for group discussion') in the same way as managing any other thread, by adding a category and/or geographical location. At this point they also strip out personal data like e-mail addresses.

Planning applications

Dealing with planning applications can often be an important part of cycle campaigning but one easily overlooked. New developments, whether small localised changes, or major new developments, affect travel patterns for decades. In this regard:

- Planning applications will become threads, in the same way as anything else.
- Where deadline information relating to a Planning Application is available, this would automatically be set in the deadline management controls noted above.

Importing data

Groups may have existing datasets of e.g. cycle parking locations or other databases. Tools will be added to enable these to be imported so they become threads like any other.

The importing tool will be a simple webform that requires a spreadsheet to be pasted in (so that the data is then interpreted as tab-separated values).

Sharing best practice between groups

Groups will be able to mark an issue as being of particular interest to other groups elsewhere in the country. For instance, a campaign involving a successful set of tactics (e.g. allowing cycling in a pedestrian zone, as happened in Cambridge for instance) could be shared with other groups.

Engagement with Local Authorities

Engagement with Local Authorities will be crucial for effective campaigning in many cases.

- Groups can choose to invite their LA officer/Councillor contacts into particular discussions.

- Groups will also be able to make compiled data available to Local Authorities (e.g. lists of cycle parking locations needing improvement)
- Councillors could be contacted directly, as noted in the thread contents section.

Publishing

Groups can publish 'What we're working on' pages based on the prioritised issues, using a variety of preset templates.

These will be available as public page components (effectively webpage snippets) that can be easily embedded into their main website, and that change automatically as new issues get worked on.

As issues (threads) are resolved, i.e. campaigns are succesful:

- The campaign group would mark it as resolved.
- These successes will show in the CycleStreets journey planner where a journey goes past the location. A message along the lines of "Cycle infrastructure here has been improved thanks to campaigning work by <groupname>", together with the group's logo, will be shown.
- Markers on the map change colour.
- A variety of attractive views of the resolved locations will be available, so that campaign groups can easily point people to the effect of their work, i.e. the outcomes that result when people join and get involved in their group, thus helping increase membership.

Exporting data

Groups will be able to export sets of data at any time, based on category (e.g. cycle parking locations) by area or search-result based.

Data can be exported as a spreadsheet or for use in a map view elsewhere.

Event management

Arranging campaign meetings and ensuring that people attend Council committee meetings is often an important part of cycle campaigning. The toolkit will therefore include a module for managing events.

Users will be able to create events, set up Doodle-style polls for finding the best time, and show a map where the meeting is, which will have an automatic 'Cycle there' journey planner link available.

Each event also has a thread attached to it, so that it can be discussed in exactly the same way as other threads. For instance, if a Council meeting has been added, campaigners will often want to discuss things on the agenda. These can be branched into multiple issues (threads) in the usual way.

Privacy and security

The system will have high regard to user privacy. Full attention will be paid to data protection issues. No financial data is needed by the system. Passwords will be stored encrypted. Regular backups will be made.