

QUALITY OF LIFE PLUS (QL+)

2011 RIDEABLE TOUR

by

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Checked by: _____ Approved by: _____

Executive Summary

Quality of Life Plus (QL+) does important work supporting members of the United States armed forces. Without significant funding, it is unlikely they could continue doing that work. Our goal was to hold a charity bike ride, the 2011 QL+ RideABLE Tour, to help them raise the funds they need. We approached the ride from two different perspectives, event planning and project management, with the hope that the two approaches could work in synergy towards a successful event. The project management approach focused on industrial engineering tools like work breakdown structures (WBS), cost analysis, and risk assessment. The goal was for each of the 50 riders to contribute a total of \$700, with \$300 covering expenses and \$400 going directly to QL+.

In many ways, we succeeded. Unfortunately, not in the ways that count the most. With rising concerns over safety and ride expenses, which had ballooned to nearly \$500 per rider, the event was postponed, likely until Fall 2011 or Spring 2012. The design was generally sound, save for a general lack of time allocated for advertising, community outreach, and rider recruitment. In short, we planned a great event for 50 riders, and then forgot to get the 50 riders. However, with minor adjustments to the design, including an increased window for advertising and registration, I have little doubt the event can be a success for QL+.

Acknowledgements

I'd like to take this opportunity to thank everyone that assisted in this event and in this project, including my IME 303 team back in Fall 2010, my advisor Roya Javadpour, Jon Monett who invited me to participate in the first place, everyone at the QL+ offices, and Kendi Root and her girls in the RPTA department. Regardless of the outcome, I enjoyed my time working with everyone, and I won't ever forget the experiences we shared together.

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Introduction

In March of 2009, the Quality of Life Plus (QL+) Laboratory was founded within the College of Engineering at California Polytechnic State University at San Luis Obispo. The QL+ organization, which fully funds the lab, was established in 2008 by Industrial Engineering (IE) alumnus Jon Monett with a mission of improving the quality of life for those who had been wounded in the line of duty through the sponsorship of multi-disciplinary engineering projects.

In the fall of 2010 I was approached by Jon and his friend Bob Barron, both of whom I had previously met, with a proposition. QL+ was attempting to organize a fundraising bike ride on behalf of the lab, and Jon was looking for IE students to get involved. It would be held in May 2011 and consist of 50 riders cycling down the California coast from the Bay Area to San Luis Obispo, with a goal of each rider raising at least \$700 to go towards the lab. He thought it might make for a good senior project, and I agreed with him.

Over the next few months, I worked closely with a team of QL+ employees, Cal Poly students and faculty, and others to plan and organize the first ever QL+ RideABLE Tour to take place on May 13, 14, and 15.

Unfortunately, on Tuesday, April 12, QL+ leadership announced a decision to postpone the 2011 RideABLE Tour, citing several factors including a lack of participants (both volunteers and riders) and sponsors, and safety concerns over road closures in Big Sur that included portions of the tour route.

This report focuses primarily on evaluating the work we did as well as determining how the QL+ RideABLE tour could be successful in the future. It will determine under what circumstances the tour would be feasible financially through a cost analysis incorporating the expenses of the ride, and fundraising forecasts. The report will not, however, include a specific

marketing plan or proposal addressing sponsorships or the recruitment of riders. It will also develop a timeline of all the tasks and events that must occur for the tour to take place in the form of a work breakdown structure (WBS), including a project network with an explicit critical path. In addition, the report will discuss the risks that go along with planning an event of this magnitude with a detailed risk assessment.

Using these tools, I plan to deliver a comprehensive evaluation, including my own recommendations, to ensure QL+ is as informed as they could possibly be when deciding how to proceed with the RideABLE Tour.

Background

History of the Project

The plan to hold a bike ride as a fundraiser for QL+ began as a spin-off of a small charity ride for diabetes that Bob Barron had been organizing for a couple of years. The diabetes ride, while successful in its own right, only consisted of about a dozen riders each year. The plan was for QL+ was to expand on the foundation provided by Bob, to include 50 riders and increased amenities during the course of the event.

My involvement with the ride began back in IME 303, Project Organization and Management, in Fall 2010. In that course, students are divided into groups to complete a quarter-long project designed to utilize the new project management skills and techniques learned throughout the class. I was a member of the team assigned to the “QL+ bike ride fundraiser”, as of yet unnamed. In that team, we divided into five primary groups, each assigned to a different aspect of the bike ride.

The first group, in charge of accommodations, would work with QL+ to plan the overnight accommodations for the riders. The next group, in assigned to the on-course stations, would be responsible for organizing the refueling stations for the riders along the course. These stations would be stocked with things like Gatorade, water, and energy bars. The third group, the sponsorship group, would attempt to secure sponsorships for things like drinks, snacks, and shirts for the ride. The fourth group would be in charge of the finish line celebration at the end of the ride. It was our idea to have the riders finish on campus in front of Building 192, where a barbeque and reception would await them. The fifth and final group would provide support to the

other four, as well as assist QL+ with any administrative or human resources issues that came up during the preparations. Each of those first four groups was responsible for their own portion of a master WBS, cost analysis, and risk assessment, to be compiled and edited by the fifth. A final report of our work and findings was submitted to Roya Javadpour on December 2, 2010. While suitable for an IME 303 project, that report was far from exhaustive in terms of planning and executing everything necessary for a 3 day event spanning over 200 miles.

By the time I had signed on to the ride for my senior project, it was clear that the IME 303 report would not provide much actual use. Our team of industrial engineering students was just not familiar enough with sheer depth of the tasks, events, and responsibilities that go along with organizing a legitimate event to have understood what was really necessary when attempting to plan for it. Luckily QL+ had arranged for a new team, which included Kendi Root and her students in the Recreation, Parks, and Tourism Administration (RPTA) department. Kendi teaches an advanced event planning course in the RPTA department, which focuses on events just like the QL+ charity bike ride. Other members of the team included Cal Poly faculty members Bill Hendricks of the RPTA department and Kevin Taylor from Kinesiology, and QL+ employees Amanda Dunn and Susanne Seward. With the new team assembled, we were ready to design our approach for making the freshly named 2011 QL+ RideABLE Tour a reality.

Literature Review

When reviewing literature for this project, I focused primarily on five topics: project management best practices, work breakdown structures (WBS), cost control and analysis, risk assessment, and fundraising through sporting events. The first four covered the industrial engineering tools I would employ for this project. As for the fifth, fundraising through sporting events, I felt some background information in the field would be useful since after all, the objective of this event was to raise money for QL+ through a sporting event.

Project Management Best Practices

While they may each say it slightly differently, most people involved in the field of project management agree that there is generally a “best” way to go about a project. Cope, Bradley, and Kerr (2008) break it down into four steps: Setting a baseline plan, measuring progress and performance, comparing the plan against actual project status, and taking necessary action.

In addition to getting the process right, there are other key areas to address to help ensure the success of a project. Georgieva and Allan (2008) discovered seven categories of best practices: managing the customer, managing the project work, managing communications, managing stakeholders, managing awareness, motivating, and knowledge transfer. It is the role of the project manager to ensure the needs of all seven of those fields are met to the best of their ability.

Schmid and Adams (2008) feel that the key to a successful project is the motivation of the team, and that the responsibility of motivating the team falls upon the project manager.

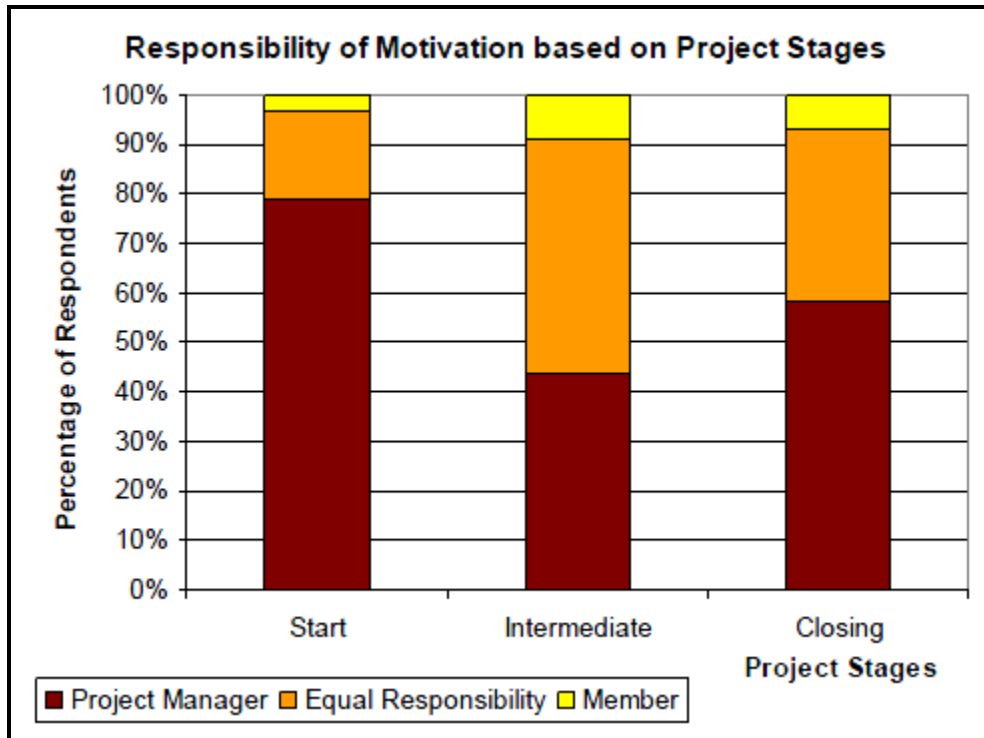


Figure 1. Graph by Schmid and Adams showing the results of a poll regarding the responsibility of motivation based on project stages

The chart shows that the majority of respondents, made up of primarily North American project managers with 5 or more years of experience, feel it is the manager's duty to stir motivation at the start of a project. In the middle stages, that percentage drops to 44%, shifting responsibility to both the individual team member as well as the manager. Near the end of the project, 58% expressed the responsibility lying with the project manager. However, during all three stages, 90% of respondents agree that the project manager is at least equally responsible to the individual team members for providing motivation.

Raymond and Bergeron (2007) determined that the use of project management information systems (PMIS), generally as software packages, is advantageous to project managers. According to their research, PMIS improve cost control and increase the chances of meeting project deadlines. Microsoft Project, used in this project, is an example of a PMIS.

Work Breakdown Structures

Most project management professionals would agree that the work breakdown structure (WBS) is the foundation of planning and measuring activities over the course of a project (Rad, 1999). A work breakdown structure helps integrate project plans for time, resources, and quality and provides a roadmap for planning and monitoring nearly every aspect of a project including cost estimates, time estimates, scheduling, productivity, and performance.

The first step in developing a WBS is to group all of the elements of a project into categories, referred to as level one. Then, each of the level one categories is broken down into several, more specific, level two categories. These level two categories are then broken down again into level three categories and so on, with each level becoming more specific than the last. Depending on the project, there could be any number of possible levels. The goal of this process is to divide the project until it consists of discrete, individual items that are easy to define and relatively simple to complete.

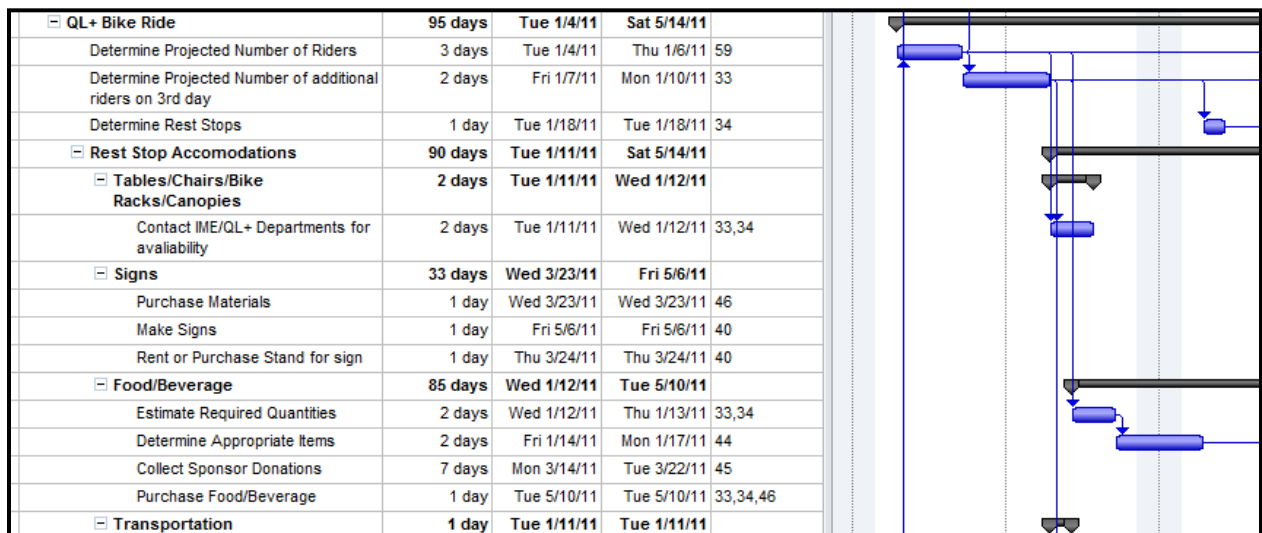


Figure 2. Snapshot of an early draft of the QL+ bike ride WBS

Cost Control and Analysis

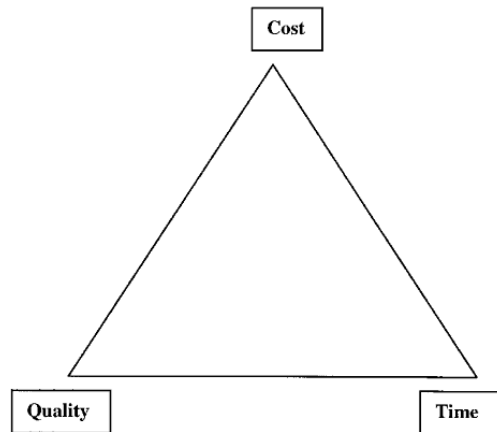


Figure 3. Atkinson's "Iron Triangle"

Atkinson (1999) mentions that there are three primary criteria for project success: cost, quality, and time. However, rising costs can sink a project faster than nearly anything else. To help prevent costs from getting out of control, Stretton (2009) mentions two key checks and balances. One, provide assurances that the project manager will be fully informed of costs at all time and have the opportunity to take corrective action. Two, if costs reach a certain level of variation from the predicted values, report costs to a higher level of management. The goal of these checks would be to prevent costs from climbing without anyone noticing until it's too late.

It is important to note that change itself within a project is not necessarily bad. Things like scope, time, cost, and quality objectives can change regularly for any project. The key is to have effective control systems in place to deal with change. Stretton (2009) recommends dividing changes into four categories: No change in cost, change with new price agreed with client on the spot, change with price not agreed and no work until price agreed, and change with no price agreed but with work to proceed before price is agreed. Having a system for monitoring project changes will help reduce unforeseen cost increases.

Risk Assessment

Glenn Koller (2008) defines a “risk” as “a pertinent event for which there is a textual description.” (p. 1) By that definition, a risk can have a positive or a negative effect on a project, and could be considered a threat or an opportunity. Basically, a risk is any event that might happen and you could tell someone what it is.

Risks have two important parameters: likelihood and severity. It is the goal of the risk assessment (RA) to account for as many of those potential risks as possible before they occur. The RA is also used to implement a system of triggers and contingencies to mitigate the negative effects that could be caused by those risks.

Koller (2008) recommends the following process for implementing RA practices in project teams:

- Hold a risk identification event early in the project
- Record risks and other information in a risk register
- Review existing risks and identify new risks on a regular basis
- Incorporate every possible area in the risk assessment including medical, security, logistic, engineering, financial, and others
- Develop contingency and prevention plans for any risk in the register
- Assign a team member to maintain the shepherd the RA process throughout the life of the project

For an example of a risk assessment matrix, please see appendix G.

Fundraising through Sporting Events

According to Bennett, Mousle, Kitchin, and Ali-Choudhury (2007), there are ten possible motives for participating in a charity-affiliated sporting event:

- Desire to mix socially
- Desire to experience fun and enjoyment
- Desire to pursue a healthy lifestyle
- Desire to experience helper's high
- Feels a duty to participate
- Desire to experience physical and mental stimulation
- Exhibitionism
- Involvement with the sport
- Attracted by the status of the event
- Involvement with a good cause
- Desire to help the charity

From the results of their study, Bennett et al. (2007) found that the two strongest motives for participating in a charity-affiliated sporting event are the individual's level of involvement with the good cause in question, and the desire to pursue a healthy lifestyle. The study also showed that 81% of individuals sampled were willing to pay additional entrance fees for events connected to a charity. In addition, the higher the status of the occasion, the higher the likelihood of individuals willing to devote intense effort to raising funds from friends, family, and coworkers.

Bennet et al. (2007) recommend that when advertising for the event should prominently feature the health credentials of an event. According to their study, 74% of respondents had participated in two or more charity relates sporting events, demonstrating that many utilize these occasions as important parts of their health and fitness routines. LaChausse (2006), in a different study on the motives of competitive and non-competitive cyclists, found that goal achievement, health concerns, and weight concerns were the main reasons why individuals chose to participate in cycling, further demonstrating the potential of the health angle when advertising for this type of an event.

Filo, Funk, and O'Brien (2008) suggest several strategies for promoting the social angle of a sporting event: enabling sociability, creating event-related social events, facilitating informal social opportunities, producing ancillary events, and theming. By building a social culture about an event, organizers can help leverage the community towards social change that can benefit the organization possibly more than fundraising alone. Filo et al. give the example of the events of the Lance Armstrong Foundation and the yellow LIVESTRONG wristbands, which in addition to raising millions of dollars for the foundation, foster a sense of community around the cause.

Design

The QL+ RideABLE Tour was approached from two different angles, engineering project management and advanced event planning.

Advanced Event Planning Approach

The team of RPTA students and faculty, led by faculty member Kendi Root, included students Lindsey Walker as student co-chair, Claire Wilson on food and beverage, Lindsey Wong on volunteers and merchandise, Lauren Fallat on route planning and transportation, Darci Malone on promotions and registration, Tracy Ottey on reception, Nika Jalali as expeditor, Lauren Coleman on accommodations and legal, and faculty member Bill Hendrickson supporting. This approach consisted of a logistical plan divided into 16 main goals, each with several specific tasks under each goal. Please note that the materials in appendices A and B were prepared by RPTA students, and that the registration form in appendix C was created by QL+.

Goal 1 – Bike Route

The first goal was to finalize the bike route. Finalizing the route included identifying lunch and break locations, creating signage and maps, and coordinating the route with the transportation and the support and gear (SAG) vehicle. See figure 4 on the next page for an image of the route from the event flyer. An early draft of the flyer can be seen in appendix A.

Goal 2 – Sponsor Menu/Categories

One of the most important aspects of the event is the acquisition of adequate sponsorship funds. In order to make sponsorship more accessible to potential sponsors, the RPTA team developed a “menu” consisting of different items and levels available to sponsor. These levels

vary from “Official Sponsor” for \$10,000 to “Celebration Tour Finale Bar Sponsor” for \$500. For the complete sponsorship packet, please see appendix B.



Figure 4. An image of the final route along Highway 1

Goals 3 and 4 – Set Budget

Once the sponsorship levels were determined, the next step was to create a budget template and begin forecasting costs. In the future, this would be the stage where the previous year’s budget would be reviewed. However, with this being the first attempt at the ride, those figures do not yet exist. Once the initial forecasts had been made, a breakeven point could be calculated. For more on the budget and financials, please refer to the cost analysis in the project management design section on page 29.

Goals 5 and 6 – Registration

Before people could sign up for the ride, the registration forms and waiver forms had to be prepared. In addition, the on-site registration for the day of the event had to be organized. These preparations included things like signage, rider numbers, and supplies. For drafts of the registration forms, please refer to appendix C.

Goal 7 – Website and Marketing

Since registration would take place online, it was crucial for the website to launch as soon as soon as the registration system and forms were ready. In addition, the marketing plan had to be initiated. This plan consisted of contacting local bike clubs, distributing flyers at cycling shops, posting the event on online cycling message boards, and any other advertising deemed necessary to generate interest sufficient for 50 participants.

Goal 8 – Food and Beverage

With an event that spans three days, there are several meals that had to be accounted for. A menu was developed that meets the needs of an athlete during a strenuous physical undertaking while remaining cost effective. Additional accommodations were made for any special needs or diets riders might possess.

Goal 9 – Celebration Reception

A reception was planned as a celebration for the completion of the three day ride. There were several steps that went in to preparing for this reception, including selecting the facility, reserving the site, securing special guests, seeking approval to serve alcohol, developing a program, and booking entertainment.

Goal 10 – Accommodations

Once again, since the RideABLE Tour was a three day event, overnight accommodations had to be provided for the riders on the course. These had to be both booked and confirmed at the locations determined during the route planning phase.



Figure 5. Cabins at Costanoa, Photo by An Tran for LAist

Goal 11 – Transportation/SAG/Emergency

In the final ride route there was a distance of over 200 miles between the starting and ending locations, raising the need for transportation back to the start once the event was complete. In addition, a SAG vehicle was booked to support the riders on the course, as well as provide any necessary emergency assistance.

Goal 12 – Merchandise

Planned merchandise for the event included official QL+ RideABLE Tour jerseys designed by Lindsey Wong and “goodie bags” for each of the riders containing applicable items to a cycling event as well as promotional products provided by sponsors.



Figure 6. RideABLE Tour jersey design by Lindsey Wong

Goal 13 – Safety and Risk Management

For more on the risk management program, please refer to the risk assessment section of the project management design on page 30.

Goal 14 – Volunteer Coordination

The plan for the QL+ RideABLE tour relied heavily on volunteers, both on the course and at the celebration reception. The QL+ club on campus offered to provide a significant number of volunteers, with the remainder recruited primarily through word of mouth.

Goal 15 – Final Logistics and Legal Checks

The final step before the ride involved checking and confirming things like permits, fees, insurance, emergency locations, contact details, and the daily event schedules. In addition, a tour of the QL+ lab on campus was scheduled for any rider interested in visiting the lab and learning more about the projects the event was helping to sponsor.

Goal 16 – Post-Event

The last stage of the plan included sending “Thank You” cards to riders, sponsors, and volunteers and finalizing the budget to accurately represent the true cost of the event.

Project Management Approach

The project management approach to the RideABLE Tour worked closely alongside the advanced event planning one. The primary components of the project management design were the WBS, based in part on the goals of the sixteen step logistical plan from event planning, a cost analysis detailing projected earnings from the ride, and a risk assessment.

Work Breakdown Structure

The WBS was created using Microsoft Project and based upon the tasks and information outlined in the IME 303 report, the event planning logistics, and the literature review. At the top level, it was divided into five categories: the ride, administration, accommodations, finish line celebration, and marketing. Please note that the start dates shown in the images of the WBS are arbitrary and could be easily adjusted to meet the requirements of any actual event date. “The Ride” incorporates any task that deals directly with the route and the time the riders spend on it. It includes things like the starting and finishing locations of each leg, the intermediate stops and lunch breaks, coordination with the SAG vehicle, and eventually finalizing the route.

An important part of developing a valuable WBS is the input of task predecessors. As shown in figure 7 on next page, nearly every other task within “Route” is a predecessor for “Finalize.” This prevents the software from beginning the “Finalize” task until all of the predecessors are complete. Accurately aligning the predecessors and successors of a project allows the software to generate a network diagram, which is essentially a road map of the project. Within this network diagram one path in particular is highlighted, indicating the “critical path”. Most tasks have “slack” time, or extra time, where delaying them won’t have any effect on the finish date of the overall project. However, there is always, by definition, a critical path of

tasks with no slack which determines the ending date of the project. If any of the tasks on the critical path are delayed, the ending date of the entire project is pushed back with it.


		Task Name	Duration	Start	Finish	Predecess
1		<input type="checkbox"/> QL+ RideABLE Tour	170 days	Fri 6/3/11	Thu 1/26/12	
2		<input type="checkbox"/> The Ride	42 days	Fri 6/3/11	Mon 8/1/11	
3		<input type="checkbox"/> Route	42 days	Fri 6/3/11	Mon 8/1/11	
4		Start location	7 days	Fri 6/3/11	Mon 6/13/11	
5		End location	7 days	Fri 6/3/11	Mon 6/13/11	
6		Overnight stops	14 days	Fri 6/3/11	Wed 6/22/11	
7		Lunch Stops	14 days	Fri 6/3/11	Wed 6/22/11	
8		Intermediate Stops	7 days	Thu 6/23/11	Fri 7/1/11	6,7
9		Risks	14 days	Mon 7/4/11	Thu 7/21/11	4,5,6,7,8
10		Prepare alternate routes	14 days	Mon 7/4/11	Thu 7/21/11	4,5,6,7,8
11		Finalize	7 days	Fri 7/22/11	Mon 8/1/11	9,10
12		<input type="checkbox"/> SAG	21 days	Fri 6/3/11	Fri 7/1/11	
13		Book vehicle	14 days	Fri 6/3/11	Wed 6/22/11	
14		<input type="checkbox"/> Coordinate route	7 days	Thu 6/23/11	Fri 7/1/11	13
15		Follow riders	1 day	Thu 6/23/11	Thu 6/23/11	
16		Transportation back to start	7 days	Thu 6/23/11	Fri 7/1/11	
17		<input type="checkbox"/> Administration	149 days	Fri 6/3/11	Wed 12/28/11	
33		<input type="checkbox"/> Accomodations	21 days	Fri 6/3/11	Fri 7/1/11	
47		<input type="checkbox"/> Finish Line Celebration	170 days	Fri 6/3/11	Thu 1/26/12	
66		<input type="checkbox"/> Marketing	88 days	Fri 6/3/11	Tue 10/4/11	

Figure 7. "The Ride" section of WBS

The second category, “Administration,” contains all of the tasks pertaining to financials, registration, volunteer coordination, and the website. This section of the WBS is shown below in figure 8.


		Task Name	Duration	Start	Finish	Predecessors
1		<input type="checkbox"/> QL+ RideABLE Tour	170 days	Fri 6/3/11	Thu 1/26/12	
2		<input type="checkbox"/> The Ride	42 days	Fri 6/3/11	Mon 8/1/11	
17		<input type="checkbox"/> Administration	149 days	Fri 6/3/11	Wed 12/28/11	
18		<input type="checkbox"/> Budget	42 days	Fri 6/3/11	Mon 8/1/11	
19		Review old budget	14 days	Fri 6/3/11	Wed 6/22/11	
20		<input type="checkbox"/> Cost analysis	28 days	Thu 6/23/11	Mon 8/1/11	
21		Break even point	14 days	Thu 6/23/11	Tue 7/12/11	19
22		Set fundraising goal	14 days	Wed 7/13/11	Mon 8/1/11	21
23		Set registration fees	14 days	Wed 7/13/11	Mon 8/1/11	21
24		<input type="checkbox"/> Registration	149 days	Fri 6/3/11	Wed 12/28/11	
25		Create forms	14 days	Fri 6/3/11	Wed 6/22/11	
26		Open registration	1 day	Wed 10/5/11	Wed 10/5/11	20,31,93,9
27		Registration period	60 days	Thu 10/6/11	Wed 12/28/11	26
28		<input type="checkbox"/> Website	29 days	Fri 6/3/11	Wed 7/13/11	
29		Develop basic functionality	14 days	Fri 6/3/11	Wed 6/22/11	
30		Add complex functionality	14 days	Thu 6/23/11	Tue 7/12/11	29
31		Launch website	1 day	Wed 7/13/11	Wed 7/13/11	30
32		Risk Assessment	28 days	Fri 6/3/11	Tue 7/12/11	
33		<input type="checkbox"/> Accommodations	21 days	Fri 6/3/11	Fri 7/1/11	
47		<input type="checkbox"/> Finish Line Celebration	170 days	Fri 6/3/11	Thu 1/26/12	
66		<input type="checkbox"/> Marketing	88 days	Fri 6/3/11	Tue 10/4/11	

Figure 8. "Administration" section of WBS

The “Accommodations” portion includes overnight lodging and meals as well as transportation. It is shown below in figure 9.


		Task Name	Duration	Start	Finish	Predecessor
1		<input type="checkbox"/> QL+ RideABLE Tour	170 days	Fri 6/3/11	Thu 1/26/12	
2		<input type="checkbox"/> The Ride	42 days	Fri 6/3/11	Mon 8/1/11	
17		<input type="checkbox"/> Administration	149 days	Fri 6/3/11	Wed 12/28/11	
33		<input type="checkbox"/> Accommodations	21 days	Fri 6/3/11	Fri 7/1/11	
34		<input type="checkbox"/> Overnight	21 days	Fri 6/3/11	Fri 7/1/11	
35		<input type="checkbox"/> Research locations	14 days	Fri 6/3/11	Wed 6/22/11	
36		Night 1	14 days	Fri 6/3/11	Wed 6/22/11	
37		Night 2	14 days	Fri 6/3/11	Wed 6/22/11	
38		Night 3	14 days	Fri 6/3/11	Wed 6/22/11	
39		<input type="checkbox"/> Book Locations	7 days	Thu 6/23/11	Fri 7/1/11	
40		Night 1	7 days	Thu 6/23/11	Fri 7/1/11	36
41		Night 2	7 days	Thu 6/23/11	Fri 7/1/11	37
42		Night 3	7 days	Thu 6/23/11	Fri 7/1/11	38
43		<input type="checkbox"/> Food	21 days	Fri 6/3/11	Fri 7/1/11	
44		Set menu	21 days	Fri 6/3/11	Fri 7/1/11	
45		Accommodate special requests	7 days	Fri 6/3/11	Mon 6/13/11	
46		Finalize menu	7 days	Fri 6/3/11	Mon 6/13/11	
47		<input type="checkbox"/> Finish Line Celebration	170 days	Fri 6/3/11	Thu 1/26/12	
66		<input type="checkbox"/> Marketing	88 days	Fri 6/3/11	Tue 10/4/11	

Figure 9. "Accommodations" section of WBS

The “Finish Line Celebration” section includes all tasks pertaining to the reception for the riders after they complete the final leg and arrive at the finish line. It is shown in figure 10 below.

	i	Task Name	Duration	Start	Finish	Predecess
1		<input type="checkbox"/> QL+ RideABLE Tour	170 days	Fri 6/3/11	Thu 1/26/12	
2		<input type="checkbox"/> The Ride	42 days	Fri 6/3/11	Mon 8/1/11	
17		<input type="checkbox"/> Administration	149 days	Fri 6/3/11	Wed 12/28/11	
33		<input type="checkbox"/> Accommodations	21 days	Fri 6/3/11	Fri 7/1/11	
47		<input type="checkbox"/> Finish Line Celebration	170 days	Fri 6/3/11	Thu 1/26/12	
48		<input type="checkbox"/> Food	156 days	Fri 6/3/11	Fri 1/6/12	
49		Plan menu	21 days	Fri 6/3/11	Fri 7/1/11	
50		Accommodate special requests	7 days	Thu 12/29/11	Fri 1/6/12	49,27
51		Storage/prep	7 days	Fri 6/3/11	Mon 6/13/11	
52		<input type="checkbox"/> Beverage	14 days	Fri 6/3/11	Wed 6/22/11	
53		Beverage list	14 days	Fri 6/3/11	Wed 6/22/11	
54		Coordinate with wine sponsor	14 days	Fri 6/3/11	Wed 6/22/11	
55		<input type="checkbox"/> Facility	170 days	Fri 6/3/11	Thu 1/26/12	
56		Research locations	14 days	Fri 6/3/11	Wed 6/22/11	
57		Finalize location	7 days	Thu 6/23/11	Fri 7/1/11	56
58		Prepare guest list	14 days	Thu 12/29/11	Tue 1/17/12	27
59		Equipment	14 days	Mon 7/4/11	Thu 7/21/11	57
60		Décor	14 days	Mon 7/4/11	Thu 7/21/11	57
61		Make program	7 days	Wed 1/18/12	Thu 1/26/12	57,58,59,6
62		<input type="checkbox"/> Entertainment	21 days	Fri 6/3/11	Fri 7/1/11	
63		Special guests	21 days	Fri 6/3/11	Fri 7/1/11	
64		Music	21 days	Fri 6/3/11	Fri 7/1/11	
65		Other	21 days	Fri 6/3/11	Fri 7/1/11	
66		<input type="checkbox"/> Marketing	88 days	Fri 6/3/11	Tue 10/4/11	

Figure 10. "Finish line celebration" section of WBS

The fifth and final division, “Marketing,” includes sponsorships, publicity, and merchandise, shown in figure 11 below. For a complete and compiled WBS, please see appendix D.

	i	Task Name	Duration	Start	Finish	Predecessors
1		<input type="checkbox"/> QL+ RideABLE Tour	170 days	Fri 6/3/11	Thu 1/26/12	
2		<input type="checkbox"/> The Ride	42 days	Fri 6/3/11	Mon 8/1/11	
17		<input type="checkbox"/> Administration	149 days	Fri 6/3/11	Wed 12/28/11	
33		<input type="checkbox"/> Accommodations	21 days	Fri 6/3/11	Fri 7/1/11	
47		<input type="checkbox"/> Finish Line Celebration	170 days	Fri 6/3/11	Thu 1/26/12	
66		<input type="checkbox"/> Marketing	88 days	Fri 6/3/11	Tue 10/4/11	
67		<input type="checkbox"/> Sponsorship	28 days	Fri 6/3/11	Tue 7/12/11	
68		Develop levels	14 days	Fri 6/3/11	Wed 6/22/11	
69		<input type="checkbox"/> Solicit sponsors	28 days	Fri 6/3/11	Tue 7/12/11	
70		Food	28 days	Fri 6/3/11	Tue 7/12/11	
71		Drinks	28 days	Fri 6/3/11	Tue 7/12/11	
72		Merchandise	28 days	Fri 6/3/11	Tue 7/12/11	
73		Money	28 days	Fri 6/3/11	Tue 7/12/11	
74		Equipment	28 days	Fri 6/3/11	Tue 7/12/11	
75		<input type="checkbox"/> Advertising	88 days	Fri 6/3/11	Tue 10/4/11	
76		<input type="checkbox"/> Print	42 days	Fri 6/3/11	Mon 8/1/11	
77		<input type="checkbox"/> Flyers	42 days	Fri 6/3/11	Mon 8/1/11	
78		Design	14 days	Fri 6/3/11	Wed 6/22/11	
79		Distribute	28 days	Thu 6/23/11	Mon 8/1/11	78
80		<input type="checkbox"/> Newspapers	28 days	Fri 6/3/11	Tue 7/12/11	
81		Design	14 days	Fri 6/3/11	Wed 6/22/11	
82		Run ad	14 days	Thu 6/23/11	Tue 7/12/11	81
83		<input type="checkbox"/> Internet	88 days	Fri 6/3/11	Tue 10/4/11	
84		Research	21 days	Fri 6/3/11	Fri 7/1/11	
85		Choose sites	7 days	Mon 7/4/11	Tue 7/12/11	84
86		Run ads	60 days	Wed 7/13/11	Tue 10/4/11	85
87		Coordinate with local bike shops and clubs	14 days	Fri 6/3/11	Wed 6/22/11	
88		<input type="checkbox"/> Publicity	14 days	Fri 6/3/11	Wed 6/22/11	
89		Create press kit	14 days	Fri 6/3/11	Wed 6/22/11	
90		Arrange press coverage for event	14 days	Fri 6/3/11	Wed 6/22/11	
91		<input type="checkbox"/> Cal Poly	28 days	Fri 6/3/11	Tue 7/12/11	
92		Inform faculty and staff	7 days	Fri 6/3/11	Mon 6/13/11	
93		Contact alumni	28 days	Fri 6/3/11	Tue 7/12/11	

Figure 11. “Marketing” section of WBS

Cost Analysis

The primary goal of the initial cost analysis was to determine the rider registration fees and fundraising goals. The plan was for the registration fee to cover all of the costs, with the additional funds raised to all be “profit,” money that goes straight to QL+. Using costs estimated in part by the RPTA team, it was approximated that the expenses for the ride would total near \$19,000. For more detail on this projection, see appendix E. Dividing that \$19,000 by the 50 planned riders gave an estimated cost of \$380 per rider.

With that number in hand, the next step was to decide where to set the fundraising goal for the participants. While some rides set their goals as high as \$10,000 per rider, like the Challenged Athletes Foundation’s Million Dollar Challenge, we elected to go with more modest goals for the first RideABLE Tour. After weeks of deliberation, the final levels were set at a \$300 registration fee and a \$400 fundraising goal, for a total of \$700 per rider.

In addition to the money raised by the riders, we expected extra income from selling tickets to the celebration reception and cash donations. In total, our projected gross earnings from the event totaled approximately \$45,000. Subtracting the expenses projection of \$19,000 left a net gain of around \$26,000 for the RideABLE Tour. Please note that number does not include any large scale corporate sponsorships. Those would be counted as additional “profits” on top of the funds generated directly by the participants.

	Item	Amount	Qty.	Total
Income	Rider fees	\$ 300.00	50	\$ 15,000.00
	Rider fundraising	\$ 400.00	50	+ \$ 20,000.00
	Additional income	\$ 10,000.00		+ \$ 10,000.00
	Subtotal			= \$ 45,000.00
Expenses	Total projected costs			- \$ 19,000.00
Net Gain				= \$ 26,000.00

Figure 12. Summary of initial cost analysis

Risk Assessment

The final stage of the project management design was to develop a risk assessment matrix for the RideABLE Tour. The risk assessment template from IME 303 used and included the following columns: ID#, risk type, description, likelihood, severity, trigger, contingency, and responsible party. This same template was used for the RideABLE Tour risk assessment.

ID#	Risk Type	Description	Likelihood	Severity	Trigger	Contingency	Responsible Party
1							
2							
3							

Figure 13. Risk assessment matrix template

The QL+ RideABLE Tour is a fairly unique project in terms of the sheer variety of risks that pertain to it. It is a three day fundraising event that takes place primarily outdoors and covers over 200 miles of California coastline. That means financial, environmental, operational, health, and safety risks are all in play.

For example, any of a number of financial risks could sink the event before it could even begin. In fact, the key to the success for the entire event was to secure the 50 participants as soon as possible so they would have enough time to meet their fundraising goals. Additionally, the event would be exceptionally vulnerable to the environmental conditions on the route. Inclement weather or a road closure, both distinct possibilities, had to be considered during the assessment. For the complete risk assessment, please see appendix F.

Methods

The team began in the winter with bi-weekly conference calls that were soon increased to weekly. These calls were the primary means of interaction between the different “factions” of the team. Generally, an agenda developed by Amanda Dunn at QL+ headquarters would be distributed the day before a call would take place, and would list the items to be discussed that week. This is where the majority of policy decisions for the ride were made. Towards the end of the call, once the primary discussion was finished, action items for the upcoming week would be discussed. Once the call was complete, it was largely up to the individuals to work on or complete their assigned task(s) before the reporting back on the next conference call. Within 24 hours of the call, Ms. Dunn would distribute minutes from the call highlighting key topics from the discussion and the action items addressed. An example of a call agenda and call minutes can be found in appendix G.

The majority of the goals and tasks from the design stage were completed without cause for concern. These included accommodations, ending celebration, and merchandise planning, among others. There were, however, a few areas where significant problems arose.

For one, the website was launched later than originally planned. Since many of the registration and marketing tasks depended on the website, which was part of the critical path, the team lost a significant amount of the precious little time available for marketing between February when the website launched and May when the ride would actually occur.

The extremely narrow marketing window made it difficult to recruit participants and sponsors for the event. By March, when most of the preparations for the ride were complete, less

than 10 riders had signed up for the RideABLE Tour. By this point, the team had already dropped their goal for riders from 50 to 20, but even that number began to look unachievable.

On March 17th, after an exceptionally rainy winter, a portion of the ride route along Highway 1 near Big Sur crumbled into the ocean below. Soil beneath the elevated highway began to slide, and without the support it provided, the road eventually gave way.



Figure 14. Road closure near Big Sur, picture from KCOY Central Cost News

Results and Discussion

On Tuesday April 12th, 2011, QL+ leadership announced a decision to postpone the RideABLE Tour until Fall 2011 or Spring 2011. The reasons cited included safety issues from the road closures and a shortage of sponsors and riders.

The initial cost estimates had proven to be far below the actual costs, which by that point already exceeded \$20,000 and were likely still incomplete. Appendix H includes an outline of the actual expenses as of the time of postponement. However, in the interest of QL+, the RPTA department, and other invested parties, the specific cost of each item listed has been deleted. The final expense estimation was approximately \$25,000 for 50 riders.

Clearly, these were not the results we had anticipated. We were fully expecting to hold the event in May and for it to be a successful fundraiser. The most obvious culprit behind our failure was the very small timeframe we were operating under for marketing and rider registrations. By the time the website was even open for registration, there was less than 3 months until the event was to actually take place. Most events of this type give riders a much larger window for training and preparation. In addition, our planned advertising methods were not the kinds that could be fully realized in only 1-2 months. Our intentions were to get the ball rolling through selective online ads and flyers, and let word of mouth take over. With only 50 riders, we felt this method would be successful. However, we clearly underestimated the amount of time necessary for a successful word of mouth advertising campaign. After all, by the time the ride was postponed, we had less than a dozen people registered to participate.

It is important to note that the majority of the planning efforts for the event were successful. In general, the design for the project was sound. All of the accommodations and route

planning had taken place, and preparations for the ending celebration were coming along nicely. However, our approach to marketing and community outreach was clearly inadequate. By March, there was a clear sense that our efforts had to increase dramatically, but it came too late to affect the outcome of the event. If we had expanded our advertising and outreach operations sooner, I believe the event would have been a success. In reality, gathering the necessary participants for the event is the single most important part of the planning stage. Without the riders, there is no event, as we so unceremoniously discovered.

In the future, I think the event should proceed with all ride expenses being covered by registration fees and all additional funds raised going straight to QL+ as “profit.” From the data, it can be assumed that approximately \$10,000 of the expenses is fixed and the rest would vary based on the number of riders, with a total of \$25,000 for 50 riders. Shown below is a graph of the registration fee required to cover expenses based on the number of participants. The formula used was $\$10,000 + (X/50)*\$15,000$, where X is the number of ride participants.

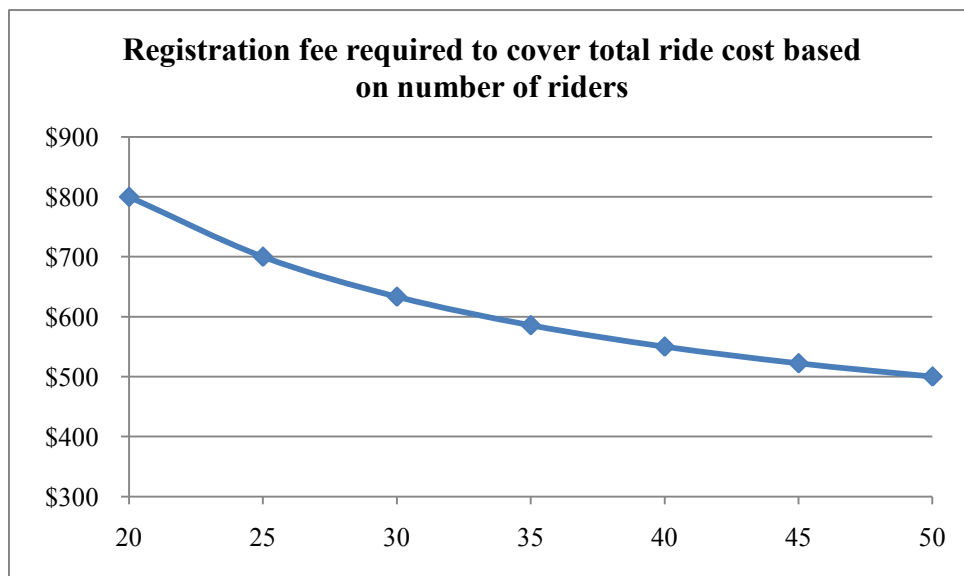


Figure 15. Registration fees based on number of riders

The individual fundraising goal for the riders was originally set at \$400, which is rather low for an event of this type. QL+ can decide how much money they would like to raise from the event, and set the goal accordingly, whether it is \$400, more, or less. Shown below is a graph of total funds raised for QL+ based on different goals for a field of 50 riders.

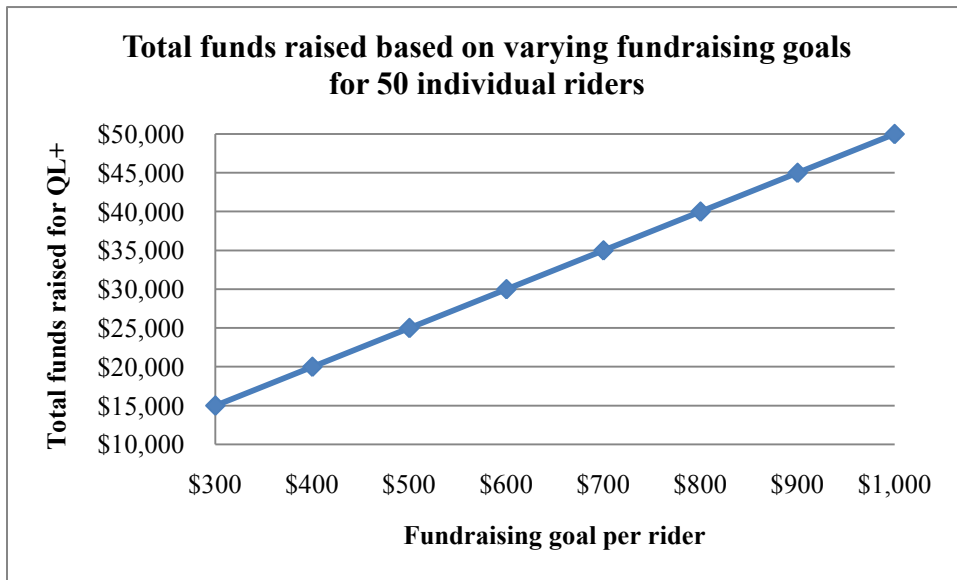


Figure 16. Total funds raised for QL+ based on individual goals for a field of 50 riders

Conclusions

QL+ does fantastic work providing engineering solutions to men and women who have served the United States on America in the armed forces. Their laboratory on campus at Cal Poly requires a constant inflow of funding, and it was our goal to raise the money they need through the 2011 RideABLE Tour, a 3-day, 250 mile charity bike ride down the California coast. The planning approach included engineering project management tools like work breakdown structures and cost analysis, as well as event planning methods contributed by the RPTA department at Cal Poly.

In the end, the ride was postponed due to safety issues and a lack of participants. We planned a great event for the riders, but forgot to get the people to sign up to ride. The most important lesson I'll take away from this project is to make sure and address the most important issues of something before moving on to the minutia. Who cares if there are 12 types of beverages at the celebration reception if there's nobody to celebratorily receive?

Additional conclusions include:

- Not all people are alike. Logic or argumentation that works with one group of people won't necessarily work with another.
- Word of mouth marketing takes a long time. It might take several months before you see the kind of results you were hoping for.
- Communication is good. Team members give each other excellent feedback because they are constantly checking in and making sure nobody is being left behind in the process and that nobody is ignoring their responsibilities, often better than a manager alone can.

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3 DAYS. 236 MILES.

AN INCREDIBLE EXPERIENCE OF A LIFETIME!

The Pescadero to San Luis Obispo Bike Tour

May 12-14, 2011

What: 236 mile scenic bike tour along Route 1 in California, from Pescadero to San Luis Obispo for 3 days and 3 nights.

Where: Costanoa Coastal Lodge and Camp, 2001 Rossi Road at Hwy 1 Pescadero, CA 94060

When: May 12-14, 2011, 8am

Why: To raise funds for QL+. Some of the funds raised will support the QL+ Laboratory at Cal Poly, where students and faculty develop innovative technological solutions that help our nation's injured heroes live, work and play to their full potential.

Who: For experienced riders. Full service, Support and Gear (SAG) vehicle, meals, and 2 nights' accommodation.

How: Register online by 00/00/11 at: www.qlplus.org/rideabletour



Cost: Each 3-day rider is required to meet a fundraising minimum goal of \$500. The QL+ team will provide you with the tools you will need to reach this fundraising goal. For fundraising information go to: www.qlplus.org/rideabletour.

Contact: Kendi Root at: kroot@calpoly.edu or Roya Javadpour at: rjavadpo@calpoly.edu

Register online by 00/00/11 at: www.qlplus.org/rideabletour



Quality of Life Plus

The QL+ RideABLE Tour benefits QL+, a 501(c)(3) not-for-profit organization, by raising vital funds that enable QL+ to develop innovative technological solutions that improve the quality of life of those who were wounded in the service of our country - America's greatest heroes.

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QUALITY OF LIFE PLUS

The Costanoa to San Luis Obispo Bike Tour

May 12-14, 2011

Benefiting Quality of Life Plus (QL+), the QL+ RideABLE Tour 2011 is a scenic bike ride along Route 1 in California. Beginning the morning of May 12th in Costanoa, and ending on the evening of May 14th with a finale celebration at the QL+ Laboratory at California Polytechnic State University (Cal Poly) in San Luis Obispo, cyclists will enjoy 246 miles of one of the most beautiful coastlines in the world, riding alongside famous wineries, majestic lighthouses and unspoiled beaches.

All proceeds from this exhilarating 3 day, 246-mile bike ride will help fund the QL+ Program, a 501(c)(3) not-for-profit organization whose mission is to foster and generate innovations to aid and improve the quality of life of those wounded in the service of our country—America's greatest heroes. QL+ funds the

QL+ Laboratory at Cal Poly, where students and faculty research and develop prosthetics and innovative assistive technological solutions that help our nation's injured heroes live, work and play to their full potential.

Your sponsorship of the QL+ RideABLE Tour 2011 is vital.

Please select the sponsorship level that best meets your budget from the options below, then mail the completed form with your payment – and we will do the rest! Every sponsorship level comes with exclusive benefits. More importantly, your sponsorship of the QL+ RideABLE Tour 2011 represents your tribute to our nation's injured heroes and your commitment to helping QL+ improve the lives of those wounded while protecting our country and our communities.



www.qlplus.org/rideabletour



QUALITY OF LIFE PLUS Sponsorship Levels and Benefits

Official Ride Sponsor (\$10,000)

2 available

- Leading recognition in all printed and web-based materials
- Engraved 'Thank You' plaque
- Podium recognition at Celebration Tour finale event
- Name, logo and company or individual's description (max. 100 words) on QL+ website
- Individual signage at all campsites and at Celebration Tour finale event
- 8 tickets to Celebration Tour finale event at the QL+ Laboratory in San Luis Obispo, California
- Option to provide branded item for rider welcome bags

Meal Sponsor (\$5,000)

1 available

- Podium recognition at Celebration Tour finale event
- Name, logo and company or individual's description (max. 100 words) on QL+ website
- Individual signage at mealtimes throughout QL+ RideABLE Tour
- 6 tickets to Celebration Tour finale event at the QL+ Laboratory in San Luis Obispo, California
- Option to provide branded item for rider welcome bags

Support And Gear (SAG) Vehicle Sponsor (\$5,000)

2 available

- Podium recognition at Celebration Tour finale event
- Name, logo and company or individual's description (max. 100 words) on QL+ website
- Individual signage on vehicle throughout QL+ RideABLE Tour

- 6 tickets to Celebration Tour finale event at the QL+ Laboratory in San Luis Obispo, California
- Option to provide branded item for rider welcome bags

Celebration Tour Finale Event Sponsor (\$5,000)

1 available

- Podium recognition at Celebration Tour finale event
- Name, logo and company or individual's description (max. 100 words) on QL+ website
- Individual signage at Celebration Tour finale event
- 6 tickets to Celebration Tour finale event at the QL+ Laboratory in San Luis Obispo, California
- Option to provide branded item for rider welcome bags

Costanoa Campsite Sponsor (\$2,500)

1 available

- Name, logo and company or individual's description (max. 100 words) on QL+ website
- Individual signage at Costanoa Campsite
- 4 tickets to Celebration Tour finale event at the QL+ Laboratory in San Luis Obispo, California
- Option to provide branded item for rider welcome bags

Sunset Beach Campsite Sponsor (\$2,500)

1 available

- Name, logo and company or individual's description (max. 100 words) on QL+ website
- Individual signage at Sunset Beach Campsite
- 4 tickets to Celebration Tour finale event at the QL+ Laboratory in San Luis Obispo, California
- Option to provide branded item for rider welcome bags

continued





QUALITY OF LIFE PLUS

Sponsorship Levels and Benefits (continued)

Big Sur Campsite Sponsor (\$2,500)

1 available

- Name, logo and company or individual's description (max. 100 words) on QL+ website
- Individual signage at Big Sur Campsite
- 4 tickets to Celebration Tour finale event at the QL+ Laboratory in San Luis Obispo, California
- Option to provide branded item for rider welcome bags

RV Support Vehicle Sponsor (\$1,000)

4 available

- Name and logo on QL+ website
- Signage on vehicles throughout QL+ RideABLE Tour
- 2 tickets to Celebration Tour finale event at the QL+ Laboratory in San Luis Obispo, California

Opening Night Celebration Event Sponsor (\$1,000)

1 available

- Name and logo on QL+ website
- Signage at event
- 2 tickets to Celebration Tour finale event at the QL+ Laboratory in San Luis Obispo, California

Beverage Sponsor (\$1,000)

1 available

- Name and logo on QL+ website
- Signage throughout QL+ RideABLE Tour
- 2 tickets to Celebration Tour finale event at the QL+ Laboratory in San Luis Obispo, California

First Aid Sponsor (\$500)

1 available

- Name on QL+ website
- 1 ticket to Celebration Tour finale event at the QL+ Laboratory in San Luis Obispo, California

Welcome Bag Sponsor (\$500)

1 available

- Name on QL+ website
- 1 ticket to Celebration Tour finale event at the QL+ Laboratory in San Luis Obispo, California

Celebration Tour Finale Event Entertainment Sponsor (\$500)

1 available

- Name on QL+ website
- 1 ticket to Celebration Tour finale event at the QL+ Laboratory in San Luis Obispo, California

Celebration Tour Finale Event Bar Sponsor (\$500)

1 available

- Name on QL+ website
- 1 ticket to Celebration Tour finale event at the QL+ Laboratory in San Luis Obispo, California

Friend of ... Ride Sponsor (\$100)

- Name on QL+ website





QUALITY OF LIFE PLUS Sponsorship Application Form

Yes, I want to support the QL+ RideABLE Tour 2011 at the following level:

- | | |
|---|--|
| <input type="checkbox"/> Official Sponsor (\$10,000) | <input type="checkbox"/> Opening Night Celebration Sponsor (\$1,000) |
| <input type="checkbox"/> Meal Sponsor (\$5,000) | <input type="checkbox"/> Beverage Sponsor (\$1000) |
| <input type="checkbox"/> Support and Gear (SAG) Vehicle Sponsor (\$5,000) | <input type="checkbox"/> First Aid Sponsor (\$500) |
| <input type="checkbox"/> Celebration Tour Finale Event Sponsor (\$5,000) | <input type="checkbox"/> Welcome Bag Sponsor (\$500) |
| <input type="checkbox"/> Costanoa Campsite Sponsor (\$2,500) | <input type="checkbox"/> Celebration Tour Finale Event Bar Sponsor (\$500) |
| <input type="checkbox"/> Sunset Beach Campsite Sponsor (\$2,500) | <input type="checkbox"/> Celebration Tour Finale Event Entertainment Sponsor (\$500) |
| <input type="checkbox"/> Big Sur Campsite Sponsor (\$2,500) | <input type="checkbox"/> Friend of ... Rider Sponsor (\$100) |
| <input type="checkbox"/> RV Vehicle Support Sponsor (\$1,000) | |

Please print clearly.

Name of individual or company (as you would like it to appear in published materials)

Address (for mailing purposes)

Email

Phone

Alternate phone

Please make checks payable to 'Quality of Life Plus Program' and mail, along with this form, to:

Quality of Life Plus • 6748 Old McLean Village Drive • McLean, VA 22101 **Please respond by April 15, 2011.**

QL+ is a 501(c)(3) not-for-profit organization, established in March 2009 and headquartered in McLean, Virginia.
For more information, please call us at 703-442-0038 or email us at info@qlplus.org.



www.qlplus.org/rideabletour

APPENDIX C



The QL+ RideABLE Tour
The Costanoa to San Luis Obispo Bike Tour
May 12-14, 2011



Registration Form

Please register by May 9, 2011

To select an option(s) below, please click the checkbox on the left.

Please Note: If you only wish to register for an event dinner, please check the appropriate box, fill out your information and continue to payment. If you would like to pay the full \$700 pledge amount at this time, please check the \$300 registration box and add an additional donation of \$400 before proceeding.

Remember, proceeds from the QL+ RideABLE Tour 2011 go towards the QL+ Program, providing those injured in the line of duty with prosthetics and other assistive devices that enable them to live, work and play - including cycling!

<input type="checkbox"/> Registration for RideABLE Tour - \$300 (non-refundable)	
Amount: \$	300.00
Includes 3 breakfasts, 3 lunches, 2 dinners, accommodations at Sunset State Beach and Big Sur, event jersey, welcome bag and Celebration Tour Dinner.	
Rider commits to raise a minimum additional amount of \$400 by 5/9/11 (via their homepage donations or other method); otherwise, rider will not be registered, will not participate in ride and the \$300 registration fee will be donated in full to QL+.	
Allergies and special requests	<input type="text"/>

<input type="checkbox"/> Opening Celebration Dinner - \$20 each	
# of Dinners:	<input type="text" value="0"/> x 20.00 = \$0.00


<input type="checkbox"/> Optional Closing Celebration Tour Dinner for Non-Riders - \$50 each	
# of Dinners for Non Riders:	<input type="text" value="0"/> x 50.00 = \$0.00

<input type="checkbox"/> Optional Closing Celebration Tour Dinner for Students - \$25 each	
# of Dinners for Students:	<input type="text" value="0"/> x 25.00 = \$0.00

<input type="checkbox"/> Optional SAG Vehicle for Riders -Leaves 8 am Sunday May 15, traveling back to Costanoa	
Amount: \$	50.00

<input type="checkbox"/> I would like to make an additional donation	
Amount: \$:	<input type="text" value="0.00"/>

APPENDIX D

	 Task Name	Duration	Start	Finish	Predecessors
1	<input type="checkbox"/> QL+ RideABLE Tour	170 days	Thu 9/1/11	Wed 4/25/12	
2	<input type="checkbox"/> The Ride	42 days	Thu 9/1/11	Fri 10/28/11	
3	<input type="checkbox"/> Route	42 days	Thu 9/1/11	Fri 10/28/11	
4	Start location	7 days	Thu 9/1/11	Fri 9/9/11	
5	End location	7 days	Thu 9/1/11	Fri 9/9/11	
6	Overnight stops	14 days	Thu 9/1/11	Tue 9/20/11	
7	Lunch Stops	14 days	Thu 9/1/11	Tue 9/20/11	
8	Intermediate Stops	7 days	Wed 9/21/11	Thu 9/29/11	6,7
9	Risks	14 days	Fri 9/30/11	Wed 10/19/11	4,5,6,7,8
10	Prepare alternate routes	14 days	Fri 9/30/11	Wed 10/19/11	4,5,6,7,8
11	Finalize	7 days	Thu 10/20/11	Fri 10/28/11	9,10
12	<input type="checkbox"/> SAG	21 days	Thu 9/1/11	Thu 9/29/11	
13	Book vehicle	14 days	Thu 9/1/11	Tue 9/20/11	
14	<input type="checkbox"/> Coordinate route	7 days	Wed 9/21/11	Thu 9/29/11	13
15	Follow riders	1 day	Wed 9/21/11	Wed 9/21/11	
16	Transportation back to start	7 days	Wed 9/21/11	Thu 9/29/11	
17	<input type="checkbox"/> Administration	149 days	Thu 9/1/11	Tue 3/27/12	
18	<input type="checkbox"/> Budget	42 days	Thu 9/1/11	Fri 10/28/11	
19	Review old budget	14 days	Thu 9/1/11	Tue 9/20/11	
20	<input type="checkbox"/> Cost analysis	28 days	Wed 9/21/11	Fri 10/28/11	
21	Break even point	14 days	Wed 9/21/11	Mon 10/10/11	19
22	Set fundraising goal	14 days	Tue 10/11/11	Fri 10/28/11	21
23	Set registration fees	14 days	Tue 10/11/11	Fri 10/28/11	21
24	<input type="checkbox"/> Registration	149 days	Thu 9/1/11	Tue 3/27/12	
25	Create forms	14 days	Thu 9/1/11	Tue 9/20/11	
26	Open registration	1 day	Tue 1/3/12	Tue 1/3/12	20,31,93,92,79,8
27	Registration period	60 days	Wed 1/4/12	Tue 3/27/12	26
28	<input type="checkbox"/> Website	29 days	Thu 9/1/11	Tue 10/11/11	
29	Develop basic functionality	14 days	Thu 9/1/11	Tue 9/20/11	
30	Add complex functionality	14 days	Wed 9/21/11	Mon 10/10/11	29
31	Launch website	1 day	Tue 10/11/11	Tue 10/11/11	30
32	Risk Assessment	28 days	Thu 9/1/11	Mon 10/10/11	
33	<input type="checkbox"/> Accommodations	21 days	Thu 9/1/11	Thu 9/29/11	
34	<input type="checkbox"/> Overnight	21 days	Thu 9/1/11	Thu 9/29/11	
35	<input type="checkbox"/> Research locations	14 days	Thu 9/1/11	Tue 9/20/11	
36	Night 1	14 days	Thu 9/1/11	Tue 9/20/11	
37	Night 2	14 days	Thu 9/1/11	Tue 9/20/11	
38	Night 3	14 days	Thu 9/1/11	Tue 9/20/11	
39	<input type="checkbox"/> Book Locations	7 days	Wed 9/21/11	Thu 9/29/11	
40	Night 1	7 days	Wed 9/21/11	Thu 9/29/11	36
41	Night 2	7 days	Wed 9/21/11	Thu 9/29/11	37
42	Night 3	7 days	Wed 9/21/11	Thu 9/29/11	38
43	<input type="checkbox"/> Food	21 days	Thu 9/1/11	Thu 9/29/11	
44	Set menu	21 days	Thu 9/1/11	Thu 9/29/11	
45	Accommodate special requests	7 days	Thu 9/1/11	Fri 9/9/11	
46	Finalize menu	7 days	Thu 9/1/11	Fri 9/9/11	

	 Task Name	Duration	Start	Finish	Predecessors
47	<input type="checkbox"/> Finish Line Celebration	170 days	Thu 9/1/11	Wed 4/25/12	
48	<input type="checkbox"/> Food	156 days	Thu 9/1/11	Thu 4/5/12	
49	Plan menu	21 days	Thu 9/1/11	Thu 9/29/11	
50	Accommodate special requests	7 days	Wed 3/28/12	Thu 4/5/12	49,27
51	Storage/prep	7 days	Thu 9/1/11	Fri 9/9/11	
52	<input type="checkbox"/> Beverage	14 days	Thu 9/1/11	Tue 9/20/11	
53	Beverage list	14 days	Thu 9/1/11	Tue 9/20/11	
54	Coordinate with wine sponsor	14 days	Thu 9/1/11	Tue 9/20/11	
55	<input type="checkbox"/> Facility	170 days	Thu 9/1/11	Wed 4/25/12	
56	Research locations	14 days	Thu 9/1/11	Tue 9/20/11	
57	Finalize location	7 days	Wed 9/21/11	Thu 9/29/11	56
58	Prepare guest list	14 days	Wed 3/28/12	Mon 4/16/12	27
59	Equipment	14 days	Fri 9/30/11	Wed 10/19/11	57
60	Décor	14 days	Fri 9/30/11	Wed 10/19/11	57
61	Make program	7 days	Tue 4/17/12	Wed 4/25/12	57,58,59,60,49,5
62	<input type="checkbox"/> Entertainment	21 days	Thu 9/1/11	Thu 9/29/11	
63	Special guests	21 days	Thu 9/1/11	Thu 9/29/11	
64	Music	21 days	Thu 9/1/11	Thu 9/29/11	
65	Other	21 days	Thu 9/1/11	Thu 9/29/11	
66	<input type="checkbox"/> Marketing	88 days	Thu 9/1/11	Mon 1/2/12	
67	<input type="checkbox"/> Sponsorship	28 days	Thu 9/1/11	Mon 10/10/11	
68	Develop levels	14 days	Thu 9/1/11	Tue 9/20/11	
69	<input type="checkbox"/> Solicit sponsors	28 days	Thu 9/1/11	Mon 10/10/11	
70	Food	28 days	Thu 9/1/11	Mon 10/10/11	
71	Drinks	28 days	Thu 9/1/11	Mon 10/10/11	
72	Merchandise	28 days	Thu 9/1/11	Mon 10/10/11	
73	Money	28 days	Thu 9/1/11	Mon 10/10/11	
74	Equipment	28 days	Thu 9/1/11	Mon 10/10/11	
75	<input type="checkbox"/> Advertising	88 days	Thu 9/1/11	Mon 1/2/12	
76	<input type="checkbox"/> Print	42 days	Thu 9/1/11	Fri 10/28/11	
77	<input type="checkbox"/> Flyers	42 days	Thu 9/1/11	Fri 10/28/11	
78	Design	14 days	Thu 9/1/11	Tue 9/20/11	
79	Distribute	28 days	Wed 9/21/11	Fri 10/28/11	78
80	<input type="checkbox"/> Newspapers	28 days	Thu 9/1/11	Mon 10/10/11	
81	Design	14 days	Thu 9/1/11	Tue 9/20/11	
82	Run ad	14 days	Wed 9/21/11	Mon 10/10/11	81
83	<input type="checkbox"/> Internet	88 days	Thu 9/1/11	Mon 1/2/12	
84	Research	21 days	Thu 9/1/11	Thu 9/29/11	
85	Choose sites	7 days	Fri 9/30/11	Mon 10/10/11	84
86	Run ads	60 days	Tue 10/11/11	Mon 1/2/12	85
87	Coordinate with local bike shops and clubs	14 days	Thu 9/1/11	Tue 9/20/11	
88	<input type="checkbox"/> Publicity	14 days	Thu 9/1/11	Tue 9/20/11	
89	Create press kit	14 days	Thu 9/1/11	Tue 9/20/11	
90	Arrange press coverage for event	14 days	Thu 9/1/11	Tue 9/20/11	
91	<input type="checkbox"/> Cal Poly	28 days	Thu 9/1/11	Mon 10/10/11	
92	Inform faculty and staff	7 days	Thu 9/1/11	Fri 9/9/11	

APPENDIX E

EXPENSES	2011 BUDGET			2010 ACTUAL		
	QTY.	AMOUNT	TOTAL	QTY.	AMOUNT	TOTAL
Administration						
Cal Poly						
Staff/wages						
Insurance			\$ 500			
Subtotal Admin.			\$ 500			
Accommodations						
Sunset \$10 per	50	10	\$ 500			
Big Sur \$15 per	50	15	\$ 750			
Sag Camp Site						
Subtotal Admin.			\$ 1,250			
Printing/Creative						
Maps			\$ 100			
Forms			\$ 100			
Flyers			\$ 100			
Creative/Design			\$ 500			
Letters			\$ 100			
Subtotal Print			\$ 900			
Food & Beverage						
Welcome Dinner	30	20	600			
Breakfast (3)	150	5	\$ 750			
Lunch (3)	150	10	\$ 1,500			
Dinner (2)	100	15	\$ 1,500			
Celebration BBQ	50	20	\$ 1,000			
Supplies			\$ 100			
Staff meals	8	10	\$ 80			
Coffe and dec included			\$ -			
Water and Gatorade		50	\$ 50			
Subtotal F&B			\$ 4,980			
Promotion/Mktg.						
Website Design and Maintenance						
Software			\$ 2,000			
Social Media						
Postage/Delivery						
Subtotal Marketing			\$ 2,000			
Celebration Recept						
Facility			\$ -			
Equipment			\$ -			

200 guests	200	16	\$ 3,200			
Entertainment						
Signage			\$ -			
AV	CP		\$ -			
Volunteers	CP		\$ -			
Bar/wine						
Subtotal Recep.			\$ 3,200			

Transportation						
Sag Vehicle			\$ 1,500			
2 RV's Drivers			\$ 600			
Gas			\$ 250			
Subtotal Transportation			\$ 2,350			

On Site Reg						
Signage			\$ -			
Supplies						
Equipment						
Subtotal Reg.			\$ -			

Merchandise						
Jerseys	50	75	\$ 3,750			
Subtotal Merch.			\$ 3,750			

TOTAL EXPENSES \$ 18,930 \$ -

INCOME						
Registration	50	\$ 700	\$ 35,000			
Sponsorships						
Cash Donations			\$ 5,000			
Celebration guests	100	50	\$ 5,000			

TOTAL INCOME 45,000 \$ -

Expenses \$ 18,930

Profit \$ 26,070

APPENDIX F

ID#	Risk Type	Description	Likelihood	Severity	Trigger	Contingency	Responsible Party
1	Financial	Not enough sponsors	2	4	Sponsorships significantly below projections within 2 months of ride	Increase marketing efforts or postpone event	QL+
2	Financial	Sponsors don't fulfill commitment	1	4	Sponsor informs QL+	Seek new sponsor	QL+
3	Financial	Not enough riders	2	4	Less than 20 riders within 2 months of ride	Increase marketing efforts or postpone event	All
4	Financial	Rider fails to meet fundraising goal	3	3	Rider informs QL+	Rider responsible for remainder of fundraising commitment	QL+
5	Financial	Costs significantly over budget	2	4	Costs are more than 20% over projections	Re-evaluate budget and proceed or postpone event	All
6	Environmental	Minor rain storm	2	2	Light rain forecasted	Proceed or wait for rain to pass	All
		Major rain storm	1	4	Heavy rain forecasted	Proceed, wait for rain to pass, or reschedule event	All
7	Environmental	Rain/Thunder/Lightning	1	5	Storm forecasted	Wait for storm to pass or reschedule event	All
8	Environmental	Excessively hot weather	2	2	90+ degrees forecasted	Provide additional water and hydration resources at stations	On-course team
9	Environmental	Road closure	1	4	Road closure announced on ride route	Determine alternate route or postpone event	All
9	Health and Safety	Rider/volunteer minor injury	4	1	Minor injury	Treat on site with first aid kit	On-course team
10	Health and Safety	Rider/volunteer serious injury	2	5	Serious injury	Find nearest hospital	On-course team
11	Health and Safety	Rider/volunteer sickness	2	2	Sickness	Ask sick person how they would like to proceed	On-course team
12	Operational	Bike requires repair	5	1	Rider informs SAG vehicle	SAG vehicle helps rider with repair	SAG
13	Operational	Rider gets lost	2	4	All riders fail to check in at break/service stations	SAG vehicle tracks down missing rider	All
14	Operational	Rider unable to complete leg	1	3	Rider informs SAG vehicle	SAG vehicle gives rider a ride to next location	SAG
15	Operational	Severe delay on course	1	3	Delay on course	Wait or find alternate route	All
16	Operational	Lack of volunteers	2	3	Fewer volunteer signups than anticipated	Seek additional volunteers using additional channels	All
17	Operational	Issues with SAG vehicle	1	3	SAG driver informs QL+	Consult with SAG vehicle	QL+/SAG
18	Operational	Hotel/Campground overbooked	2	3	Site is overbooked	Seek alternate site	Accommodations team
19	Operational	Lack of food or drinks	3	2	Stations run out of food or drink	Purchase additional provisions	On-course team
20	Operational	Merchandise delays	3	3	Provider informs QL+	Wait, or seek refund and alternate merchant	Marketing/merchandise team

APPENDIX G

Bike Ride Teleconference Call

March 31, 2011

Present:

John

Mandy

Susanne

Whitney

Kendi

Lindsay Walker

Tracey Ottey

Bob Barron

Danny Pelisek

Lauren Fallat

Route:

Mandy: Road collapse at Big Sur once again a potential problem. Original CalTran date of mid-April to re-open road is now quoted as 'late April' at the earliest.

John: Familiar problem at this time of year.

Kendi: Does this happen every year?

John: Yes, when it's late in the rainy season, with heavy storms. Late winter, early spring is key time. May and September – most large bicycle events take place then, to avoid the issue. One road closure took more than a year to fix.

Mandy: For future, would we be less vulnerable were we to reschedule the ride for September?

Kendi: Cal Poly returns mid-September

Lindsay: It's good weather then.

Bob: Heat is equal concern to rain.

Lindsay: We have a **new member Jacob (Jake) West**. He has a group of 50 riders from his hometown on the Central Coast. Emailed him last night. Gave him the link, flyer, sponsorship packet. He is going to distribute those. I will send on the email when he cc's me.

Mandy: Have discussed the detour we may need to take. An option would be to provide vehicles to ship riders around the site of the problem.

John: Affects Day 2 before riders reach Big Sur Campsite for the night, so maybe just ship them to there. But adds 2-3 hours.

Mandy: Where are we with getting the rider maps printed up?

Lauren: Getting price quotes – brochure style.

Mandy: Budgetary constraints.

[Agreed: 8.5 x 11 printouts from Cal Poly]

Outreach:

Tracey: I spoke to a Mom 'n' Pop cycle shop, First Cycles in Santa Cruz. They want to publicize the ride on their website for free.

Mandy: Can **send you the e-blast text, banner ad we're creating**.

Sent sponsorship packet to QL+ Staff, QL+ Board Members and Officers, and QL+ Leadership Council.

E-blasts:

Sent:

to Cal Poly Faculty associated with QL+

to all students on current projects

to everyone registered on the QL+ website

to all QL+ Club members

to all members of Cal Poly Wheelmen – including poster and flyer

to all members of on-campus triathlon group (Lauren was very helpful with providing a contact there)

to all RPTA students – thanks to Bill Hendricks and Kendi

Kendi: That also went to all RPTA faculty.

Mandy: Danny, where are we at with **e-blast to CE students, alumni and faculty**?

Danny: Had busy week. Talked to IE. Can **place ad in their next newsletter**. Will find out publish date.

Mandy: Need to get onto that urgently.

Farmer's Market:

Mandy: Want to try and get coverage for all of April and first week of May. Waiting to hear from QL+ Club regarding their permit but they're scheduled to be there April 13 at minimum. Collaborate with STRIDE to man their booth April 7, and if necessary, with Kevin Taylor's Activity4All booth on April 28.

Lindsay, you're already in touch with Jeremy & Devon, could you please **coordinate volunteers**?

Lindsay: Will do. Jeremy is trying to gather five volunteers to help.

Cycling Clubs/Organizations:

Mandy: Bill Kuhn, our Finance and HR Manager at HQ is an avid cyclist. He reached out to Bike Virginia and they are going to contact their counterparts in California.

We're following a number of groups on Facebook and Twitter. Also promoting ride heavily on QL+ official blog and following various blogs. Have also sent blurb to blogs about RideABLE Tour.

Whitney is researching **Bay area cycling groups** and those in SLO, San Jose and Los Altos. Will distribute when ready. One of this week's bike riders – we now have five participants – is retired/semi-retired and is prepared to approach cycling clubs and bike rides in his area of Menlo Park on our behalf.

Kendi: Dr. Marni Goldenberg from RPTA and her parents are avid cyclists. She may consider riding (especially if we discount it). Her parents are taking flyers to distribute to cycling friends.

Mandy: Thanks to Bill Hendricks, I had a very helpful phone call with Ellen Cohune, the Director of Communications for CAFES. She is reaching out to her senior contacts at Amgen to drum up interest, as well as to Mike Sinyard, CEO of Specialized, a market leader bike component company.

Military Bases:

Mandy: I'm working with our Military and Veteran Liaison Officer, Mark Donald, to make direct approaches to MWR Officers on military bases near our route to publicize the ride to officers.

Chambers of Commerce:

Mandy: Susanne has worked very hard liaising with CoCs here in McLean and SLO to publicize the bike ride. We forwarded info to McLean and hope they might put it up on their website or e-blast members.

Susanne sent the press release to Lindsay Miller at SLO CoC. It's already up on their website. She's also posting/reposting on the SLO Chamber Facebook account (weekly) and has mailed a packet of flyers, posters and sponsorship packets to display in their Visitor Center.

Kendi: I was liaising with them. Can provide more materials if they need them.

Mandy: Lindsay, did you hear back from the Club about any CoC mixers they plan to attend?

Lindsay: They do plan to attend some meetings/mixers and hand out flyers but not set dates.

Susanne: Jon will be at the April 28 breakfast meeting.

Mandy: Lindsay, please see if you can tie them down as to **which events they're going to target**.

Former Riders:

Bob: Lost two to graduations, one injured.

Media:

Cycling Publications:

Mandy: Have event posted on or awaiting approval on several online biking sites, and Whitney is working to negotiate free or reduced-rate banner adverts with others. Susanne has created a banner advert which will be available once it's been approved.

Whitney is working on a **media list for local media in SFO, SLO, San Jose and Los Altos**.

Kendi: **I have a partial list I can send over to incorporate**.

Mandy: How should we handle outreach to media, bike shops and organizations?

Kendi: Students are supposed to work 6 hrs per week, in addition to 2 hr class. Can use my office to make calls or emails. I will coordinate with Darci, who is sick.

Mandy: We can support. We now have a press release, a calendar blurb and an e-blast text available.

Facebook:

Mandy: Have cancelled Facebook ads for SLO area, concentrating on higher population/income area of SFO. Expanded to include runners, mountain bikers and triathletes.

VIP Guests:

Mandy: All of our Challengers will be at the end celebration, along with Scott and Jon.

We need a spreadsheet to show who has already been invited and then we can do follow-up – to see whether they received the invitation, whether they're coming, if they need more information. That's been the best approach with our BBQ event.

Kendi: Tracy can prepare that.

Bill, Tracy and I are meeting next Wednesday (April 6) with Conference Services, Police and Infrastructure to confirm event. It's penciled in. Jill St. John should be at that meeting too.

Jerseys:

Order has been placed for 20 jerseys. Bad news is that they're estimating 5/11 for shipping jerseys. Will try to bump forward delivery but that's very tight, considering Costanoa event is the evening of that day. May be OK with overnight shipping.

Kendi: We can always get them shipped direct to Costanoa.

Celebration Dinner:

Mandy: Where are we with the entertainment?

Tracey: The a cappella group is available. They just need to know how many people we want to perform. Will send them a contract.

Mandy: We need to see that here first.

Tracey: Will send that.

Mandy: Why didn't we go with Jason Jones?

Kendi: Not right vibe?

Tracey: Could just play his guitar and be background music?

[Agreed.]

Opening Night Celebration:

Mandy: Need to consider cancelling this if no-one registers.

ACTION ITEMS	PERSON RESPONSIBLE	DEADLINE
Confirm calendar reservation with Cal Poly	Kendi, Danny, Tracey	In progress
Recruit student bands for end celebration	Courtney, Michaella, Tracey	In progress

Get large version of map for Costanoa	Kendi	In progress
Outreach – Cal Poly cycling team	Darci	In progress
Copy of entertainment contract to HQ	Michaela, Tracey	
Display poster on campus and in local stores – including Central Coast Outdoors	Cal Poly team	
Print day-by-day maps and route instructions	Cal Poly team	
Donor/sponsor details for wine/jerseys/maps to HQ	Kendi	
Put donor/sponsor details on RideABLE website	Susanne	
Follow up about Farmer’s Market with QL+ Club	Susanne	In progress
Follow up with Ellen Cohune	Mandy	
On-campus triathlon contact details	Lauren to Mandy	
Put flyers and posters at SLO bike shops	John Flaherty	In progress
Add Jake West to Contact list	Danny	
Send banner ad to Tracey for First Cycles in Santa Cruz	Susanne	Completed
E-blast to CE students, alumni and faculty	Danny	
Information in IE newsletter	Danny	
Coordinate volunteers for Farmer’s Market	Lindsay Walker, QL+ Club, Susanne	
Distribute cycling organizations spreadsheet	Whitney	
Distribute bike shop spreadsheet	Whitney	
Send media list to HQ	Kendi	
Distribute media list spreadsheet	Whitney	
SLO CoC meetings to be attended by QL+ Club members	Lindsay Walker	
Create VIP Guest spreadsheet	Darci	
Follow up VIP guests	Darci	

APPENDIX H

Expenses and outlay for QL+ RideABLE Tour 2011

Service	Provider	Numbers	Cost
Domain name registration rideabletour.com rideabletour.net rideabletour.org rideabletours.com rideabletours.net rideabletours.org web forwarding - rideabletour.com web forwarding - rideabletour.net web forwarding - rideabletour.org	Network Solutions		
Event planning Kendi Root RPTA Department	Cal Poly		
Website design	Brand Bureau Donor Perfect		
Publicity materials	Melanie Wilkins		
Camp Accommodations	Costanoa Sunset Beach Big Sur		
Opening Event - Costanoa Food Beverages			
End Celebration - Cal Poly Food Beverages Entertainment	Cal Poly Free		
SAG Vehicle	Central Coast Outdoors /John Flaherty		
RV 1 & 2	Bob Barron		
Merchandise Jerseys Goodie bags	Primal		
Ride Meals			
Ride Beverages			
Media/PR costs Facebook Online advertizing			
		TOTAL	<u>≈ 25,000</u>