STUDY TOURS: CATALYSTS FOR CHANGE

Cities are fundamentally about humans and their senses. More than a collection of buildings, streets and public spaces, they are experiences, fueled by sights, sounds, smells, memories and emotions.

From big-picture policy to the micro details of infrastructure, cities are complex entities. It takes skill, experience and courage to imagine how a city could look, feel and function differently tomorrow than it does today.

Local leaders who have a clear vision for better neighborhoods and streets often struggle to articulate their vision in a way that convinces colleagues, constituents and stakeholders to embrace change. Even the best videos and presentations can’t compare to a live, personal experience.

As Steve Jobs once said, “People don’t know what they want until you show it to them.”

Since 2009, PeopleForBikes has led more than 300 diverse city leaders on 25+ tours totaling more than 2,000 hours. Over the past seven years, PeopleForBikes has organized study tours to high-performing European cities to inspire leaders to imagine new visions, then channel that energy into championing change back home. While many of our study tours take place overseas, domestic study tours can also be catalytic events that help build momentum and shared vision among groups of city influencers. Regardless of location, this report is intended to be both a resource and a conversation starter for cities, non-profit
organizations, academics, companies and other civic-minded groups looking to host a professional study tour that inspires bold thinking about what is possible back home.

This report is designed to help people organize and lead effective study tours, and serves as a primer for those interested in the study tour experience. It begins with a short summary of the academic theory that underlies study tours, then shares examples of specific outcomes from the study tours. Finally, it describes the various best practices for creating a study tour, leading it and helping participants draw value from it.

Generally, study tours that focus on catalyzing local change are organized by national non-profits like PeopleForBikes, fee-for-service providers, educational institutions, by local business or community groups, or by city staff themselves.

PeopleForBikes tours have focused on bicycles as a tool for better cities, with an emphasis on Denmark and the Netherlands. Delegations are made up of “citybuilders” — our term for multidisciplinary, cross-sector cohorts of change agents, visionaries, and urban influencers — who travel together to a peer city or region. The intensive tours combine multi-modal travel (train, bus, bike, foot), professional networking and knowledge exchange, hands-on site visits, and facilitated debrief sessions to frame a rolling conversation about how to make and manage change in cities at home.

While most of PeopleForBikes’ study tour experience is in northern European bike infrastructure, the same lessons and techniques described in this report can be applied to study tours with a different location or content focus. Elements of livability and governance such as public transportation, architecture/urbanism, green infrastructure, sustainability, change management, or social justice are all timely topics to study through the lens of international best practices. Regardless of the topic or destination, study tours are powerful tools for galvanizing leadership and courage to take action for better cities.

LEARNING BY DOING: KNOWLEDGE EXCHANGE AND POLICY TRANSFER

BY: MEREDITH GLASER

Research demonstrates that policies are borrowed, translated, and customized by various leaders from around the globe. Although policy transfer on both a domestic and international scale is not a new concept, its application generates debate and critique.1 Academics and practitioners are dedicated to gaining a better understanding of how policies and programs (and even ideas) are transferred from one context to another — and urban transport policy is a particular focus.2 Western European countries have a long history of transferring and diffusing policies, possibly due to geographic, political, and philosophical similarities — and the legislative ease for which it can be done.3

Compared to Europe, the United States can seem to be a completely different world. Though transfer within the United States is common, American politics tend to be “insular and introspective,” hesitant to borrow from others and apply in the US context.4 Nevertheless, there have been several attempts to transfer education, urban planning, and resource management policies — with some success.5

So policy transfer happens on an international scale. Yet there is little evidence that tells us exactly how the transfer happens, in what social or emotional context, or the conditions that influence the learning and transfer process.6 In any case, city leaders often salute the benefits of seeking lessons from elsewhere and continue to do it.2

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Unlike energy and environmental policies, transportation policy transfers more effectively because it is immediately seen, used, and felt by the learners. In the case of PeopleForBikes study tours, when a delegation travels to Amsterdam to learn about multi-modal transportation two important processes happen simultaneously. One is the embedded learning process: the individual learns about the Dutch transportation model from Dutch experts and also applies that information collectively with peers. The second process is the embodied learning process where he or she literally “learns by doing,” that is, gaining context-specific knowledge by biking or taking public transit in Amsterdam. Both of these processes are complex and emerge from high-quality social interaction and shared group experience.6

This report demonstrates exactly that: the quality of the individual and shared social and emotional journey that delegations experience appears to be just as important (if not more so) than the presentations. Something happens when people are taken out of their comfort zone, placed in situations where they are challenged, and dropped into a new, completely different, safe environment in which to take risks, build trusting relationships with peers and enjoy themselves. Riding bicycles all the while is just the icing on the cake.

CHANGES IN KNOWLEDGE, PERSPECTIVE, VISION AND APPLIED LEADERSHIP

It is evident from the actions taken in the delegations’ home cities that these tours catalyze and magnify ambition. Simply put, study tours are inspiring. Measuring the results of that inspiration is difficult. Inevitably, delegates return home from study tours ready to take action.

Ascribing any personal action to a single source, in this case a trip to Europe, would be an oversimplification. In the absence of a larger program of change, a study tour will accomplish nothing; and even without a study tour, a good idea will still exist. The primary purpose of the tour is to elevate the perceived importance of adopting good ideas and to accelerate the speed in which these ideas are shared.

With that in mind, we collected information from almost 100 delegates through interviews, email or phone correspondence. About a half of the sample joined the 2015 World Class Cities study tours, while the other half represented a compilation of alumni from 2011–2014 study tours. We explored how they shared their study tour experience with other colleagues, their key lessons, and how the trip impacted their work after they returned home.

Here are a few of the outcomes from our research that we found inspiring.

TECHNICAL AND PROCEDURAL KNOW-HOW

Fast, effective professional education for practitioners

Simply having a chance to see new designs in use on city streets is a powerful and useful experience for engineers and designers selected as study tour delegates. Similarly, professional planners, coalition-builders and managers learn directly from peers in model cities who have tackled difficult projects there.

» In November 2015, San Francisco’s first raised bikeway was constructed, an idea shaped by SF senior engineer Mike Sallaberry’s observation of similar infrastructure in Copenhagen just
months before. The City is using the bikeway as a demonstration project to test designs and provide a tangible example for community outreach and discussion. “Going on this trip has helped me improve those projects so that they are as sound as possible,” said Sallaberry, who also used design elements from the trip on a parking-protected lane that fall. In 2016, San Francisco is breaking ground on five complete-street projects that include separated bikeways.

» Before its fall 2015 tour in Denmark, the City of Boston was in the process of hiring a new manager for their bike program. Inspired by a more holistic view of transportation in Copenhagen, city leaders discussed the need to redefine and broaden the job not only to oversee the bike program and bike-share program, Boston Bikes, but to also focus on mobility, access, and most importantly, providing transportation choices. The new version of the job would be more integrated with other departments and less subject to “silo-ization.” Upon returning, the city integrated the “active transportation director” into its planning division. “Seeing how it works in Copenhagen informed our approach,” said Gina Fiandaca, Boston’s commissioner of transportation. “It’s not just about bikes — it’s about mobility, access, and offering choices.”

A PEOPLE-FOCUSED VIEW OF THE CITY

A new appreciation for people-centered, life-size urban design

Many delegates reported realizing that bikes are just means to an end. Improving biking is not about bikes, but how bikes are a tool for achieving other city goals. The underlying outcomes are stronger neighborhoods, improved local economies, higher quality places for people, fine-grained community development, and a larger vision for how cities can be better.

» The region of Atlanta was in the middle of preparing its Bicycle/Pedestrian Master Plan when Byron Rushing, transportation planner for the Atlanta Regional Commission, left for the one-week Denmark study tour in summer 2015. Rushing, usually a dyed-in-the-wool logician, became enthralled by a project where the group examined how people were using public space and the emotions they conveyed. “Happiness is such a better lens to look at performance measures,” he said. “Now my three metrics for evaluating a street are: Are there people there? Are they using it? And are they happy? Happiness may seem like a frivolous way to evaluate a city, but people enjoying themselves on the street should be a serious metric.” With happiness in mind after he returned, Rushing and his colleagues “reworded portions of the plans to incorporate a more personal and people-oriented language.”

» Gina Fiandaca, Commissioner of Transportation for the City of Boston, took part in a Denmark study tour in 2015. She recounted how the trip influenced her work: “We’re seeing a shift in how we approach transportation projects. We’re looking more holistically as a city and asking questions like, what kind of lifestyles are our projects promoting? We’re trying to connect transportation to other aspects of urban fabric like public spaces. Copenhagen has helped us get there.” The shift is already seen in the systematic changes that have taken place post-trip, as mentioned in the Investment section of this report: hiring an active transportation director to focus on mobility, access, and transportation choices and physically integrating the mobility program into the planning department.

» Increasing affordable, active transportation options within the city’s neighborhoods is a major goal of the Portland Development Commission and a key part of its 2020 Strategic Plan. Lisa Abuaf, central city manager at the PDC, also participated in a Denmark study tour in 2015. “We too often focus on infrastructure and where we’re going to locate it,” said Abuaf, summarizing her takeaways from Copenhagen. “It’s really about moving people from one place to another.” Focusing on places and destinations rather than infrastructure and raw number of miles of bikes lanes was a main topic of content on the Denmark study trip.
“If we’re really going to make this successful,” Abuaf reflected, “we have to marry [bicycle] facility planning with land use — for example, retail planning. This requires a broader conversation of development, density, and design. We have to reflect on what kinds of communities are we building through our land use policies and transportation system.” Taking action on these shifts in perspective is a longer-term process for large organizations like the PDC.

PERSONAL RELATIONSHIPS AND NETWORK-BUILDING

Group bonding and the power of a shared experience, vocabulary and vision

When a delegation of eight to 13 professionals spends an intense week traveling, eating, strategizing, and riding bikes together, an intimate group knowledge and personal relationship network is formed that wouldn’t be possible at home. Once they return, delegates have a group of knowledgeable peers in diverse fields who can be called on informally and formally for advice, expertise and support.

In fall 2015, a delegation of leaders from Los Angeles and Seattle participated in a study tour in Denmark. It was the second for Seleta Reynolds, General Manager of Los Angeles Department of Transportation, who said the tours form strong bonds and alliances between participants. “It’s striking how reliable the study tour experience is,” she said. “This alchemy occurs when people come together from different cities and different disciplines.” The group has reconvened twice since returning from their Denmark trip getting together at informal after-work dinners. “It’s just as much about continuing to cultivate the relationships formed [on the tour] as it is about getting down to business.”

Lisa Abuaf, from the Portland Development Commission, acknowledged the value of having a shared experience with people who have very different perspectives and agendas, and added how “policymakers now have a tangible experience and a shared set of information to reflect on.”

In September 2015, on the final day of a study tour in the Netherlands, a delegation of high-profile Indianapolis community leaders agreed to raise $50 to $100 million for bike infrastructure. When he got home, Brian Payne, president and CEO of the Central Indiana Community Foundation, created a mobility task force with study tour participants and other leaders from the city to design a comprehensive $100 million bicycle/pedestrian infrastructure plan, test it in the community and then raise the funds to make it happen. “There’s really nothing better to invest in that will change our neighborhoods in such a dramatic way and with proven economic results,” Payne said.

POLICY AND VISION

Improving existing rules and writing new rules that work for bicycling

Participants translated their inspiration from Europe and, once home, created new policy platforms, planning documents, and vision statements. Many cities made policy changes that will encourage and reduce barriers to new bicycling infrastructure. Elected officials became stronger supporters for funding bicycling investments and, in some cases, positioned themselves in city government to have more influence over active transportation issues.
Felicia Williams, president of the Portland Downtown Neighborhood Association, presented a summary of findings from Denmark to the Downtown Land Use Transportation subcommittee and general membership in September of 2015. Following the presentation, her board formally adopted a position that “strongly supports car-free dedicated bicycle infrastructure in the central city,” just before the city began its plan for a downtown protected bike lane network. “It was surprisingly easy to reach consensus,” Williams said.

Jolon Clark, city councilor for District 7 in Denver and part of a tight-knit 2015 delegation in the Netherlands, described a few of his own actions that occurred in his city upon return: “I have had individual conversations about my experience with most of my colleagues on Council and been appointed to the Mayor’s mobility task force. I got to give a speech at the ribbon cutting for a pop-up bike lane on Broadway in my district and have been championing that project as we work toward a permanent lane. I have also been able to push for bike infrastructure on a couple of other pending projects in my District, and helped to pass a new ordinance allowing for parking-protected bike lanes in the city.”

Vop Osili, city-county councilor for Indianapolis, was also in the Netherlands in 2015. “Over the last year I’ve become a bike rider and gotten my entire family involved in riding,” he said the following winter. “The trip has affected how I look at plans for the city infrastructure, our roads and bike paths significantly…Just recently I authorized funding for a new bike network in an area that is close to downtown that I might not have seen the vision for prior to the trip.”

In April 2015, Pittsburgh’s Mayor Bill Peduto called for the city to develop a Complete Streets policy. Mayor Peduto, a Denmark study tour participant in 2014, returned eager to buy a bike for himself and to position his city as a national leader in street design that accommodates bicycles. “When you talk about bike infrastructure and the investment in capital dollars to build it out, you’re really not talking about bike lanes,” says Peduto. “What you’re talking about is a multi-modal approach.” He emphasized the need for Pittsburgh to take a modern approach to the commuting needs of its citizens.

**PERSONAL BEHAVIOR CHANGE**

*Altered perspectives on the practicality and pleasure of urban bicycling, independent of work roles.*

The joy and comfort of being in a city where bicycling is mainstream, practical and safe is novel and unexpected for many participants, especially those not deeply involved in bicycling issues at home. Numerous participant returned with a new enthusiasm for incorporating bicycling into their own lives.

Upon returning from the Denmark 2015 study tour, Debbie Kitchin, Principal at Interworks LLC, a major construction and development company in Portland, made the goal to ride downtown and use the bicycle infrastructure on a weekday. “I rode a couple times and I can definitely see a great need to improve connections of the bike network,” she explained. In Copenhagen, she learned that people are using different modes for different trips: “It comes down to distance. I’m planning to keep a bike at work so I can switch any shorter trips [to outside meetings] to bicycling. I’d never thought of doing that before seeing it in Copenhagen.”

About a month after the study tour to the Netherlands, Denver City Councilor Jolon Clark described his own personal changes after experiencing the utilitarian style of bicycling that
seems to be second-nature to the Dutch: “I have completely transformed the way I ride my bike since the trip. I put my road bike away, and I dug out my old mountain bike. I modified it so that I sit completely upright, have a comfy seat, and a luggage rack for my stuff. I ride about 90 percent of the time to work, and have even been able to shift my non-work related mode share significantly. My Jeep is getting very lonely these days.”

» Roshun Austin, president/CEO of The Works, Inc., a community development corporation based in South Memphis, learned how to ride a bike in order to participate in the 2015 study tour to the Netherlands with nine other Memphis city leaders. During the tour, she said: “This has been one of the best experiences ever. It pushed me to the edges of what I thought were my limits. It’s inspired me. It’s got my brain working on how marginalized populations could benefit from my advocacy. I’ve never been more proud of myself for doing something I never considered.” Upon her return, she kept on riding and promised to teach her daughter how to ride.

Although inspiration comes in many forms, this report has confirmed that the study tour experience encourages uniquely thorough reflections about human behavior and culture change. “Being on a bike for 5 days causes people to think deeply about their own personal choices and how we build our cities,” said Seleta Reynolds, general manager of the Los Angeles Department of Transportation and a two-time study tour participant. “It’s magic that you can depend on.”

The study tour experience is an intense group-learning process. It’s a pressure cooker for thinking critically, honestly, and openly about their home cities. It accelerates bonding between delegates, helping them build a cohesive vision and develop an intimate, professional network for future advice, support and encouragement.
HOW TO DESIGN AND RUN A STUDY TOUR

BY: ZACH VANDERKOY

This section of the report is divided into three parts: before, during and after the tour.

Each section contains practical suggestions and lessons learned for maximizing the value of a study tour.

We know that every one of the delegates who have joined a PeopleForBikes study tour has been inspired by the experience. But converting that inspiration into strategic actions that result in better biking in the U.S. is not automatic — it must be built into the design of the tour, or everything will evaporate when citybuilders return home. Pulling this off takes preparation, execution, and good timing. A well-designed and carefully implemented tour can reframe the conversation and have a profound impact on the policy direction and built environment back in home communities.

Deciding where to go is the first step. It’s an artful balance of the audience, what they want to learn about, and the practicalities of budget and schedules. Northern European cities provide powerful lessons in thoughtful land use and density, creating great public spaces and building balanced transportation systems. As relatively homogeneous cultures, they do not provide as many replicable ideas on building diverse and inclusive communities.

PART I: BEFORE THE TOUR

CURATING AN EXPERIENCE, NOT PLANNING A TRIP

Designing a successful study tour takes experience, money, relationships, foresight and painstaking attention to detail. There are no shortcuts. Hotels, meals, transportation and other logistics must be thoughtfully chosen and meticulously arranged. Speakers and local hosts must be professional and well-prepared, with content that is relatable and relevant to the unique needs of each study tour delegation. Hands-on biking and walking tours must be well-paced, safe, and showcase examples that spark the imagination and inspire joy. The formal agenda and the informal interactions add up to an experience that is both personally and professionally transformative.

WHO GOES ON STUDY TOURS?

The most important decision for any study tour is deciding who should attend. While there isn’t a single formula for delegation selection, the most successful study tours are organized around a real-life opportunity at home and are comprised of carefully curated participants. Delegates are selected not only for their individual roles but also for their synergies and potential alliances with other participants. Leadership can come from the public, private and community sectors, not just from City Hall. A thorough understanding of local power dynamics is required to make the best choices for an effective delegation.

PeopleForBikes tours are designed for multi-disciplinary, cross-sector professionals with a common interest and influence in city improvement.
Typically, local government staff and officials form the backbone of a delegation. The more influential, the better. Participants do not need to be regular bike riders or known advocates for cycling. In fact, it is often most effective to invite people who have not fully embraced bikes. The only requirements for participation are to be open to new ideas, to have influence in transportation and/or urban quality issues, and to have a strong desire to be proactive about making their city a better place.

**THE DELEGATION CAPTAIN**

Behind every successful study tour is a well-connected, visionary individual (or team). This person is not necessarily arranging the agenda and logistics of the tour. Rather, they serve as the ringleader of an effective delegation. The “delegation captain” is politically savvy, with deep and diverse relationships across the city, credibility, and access to resources. They may be public sector staff or an elected official, or they may come from the business, non-profit, or philanthropic world. They think tactically about the dynamics of action and leadership in their community. They are the person who can “sell” the idea of a study tour to city leadership and are usually the principal fundraiser and recruiter. As the chief strategist for delegation makeup and definer of the goals and outcomes from the tour, they focus the group and build anticipation before the trip. The delegation captain will often also organize a post-trip gathering to help direct the momentum into meaningful local actions. Sometimes it is politically strategic for the delegation captain to work quietly behind the scenes. Other times, they will publicly lead the delegation.

**RAISING THE MONEY**

In times of shrinking public budgets and growing pressure on cities to deliver more with less, allocating funds for a study tour can be a heavy political lift. Cities that have successfully funded study tours draw on a variety of public and private sources, including agency budgets, business groups, local foundations, and philanthropic organizations. Crowdfunding is an up-and-coming way to create a narrative of public demand for investments in infrastructure, and has interesting potential for study tours. (Imagine a constituent-led “send our Mayor to Copenhagen” campaign.) Whatever the mix of sources, successful fundraising for a study tour usually begins with a well-connected, influential leader who is excited about the idea. Leveraging creative and innovative funding mechanisms is becoming one of the core attributes of cities that are successfully implementing changes to their streets. As with any project, identifying funding takes patience, skill, and relationships.

**PLANNING A STUDY TOUR**

The decision is made. Now is the time to think big about the next steps for the city. A cohort of influential citybuilders is motivated and organized. Dates have been chosen, being careful to avoid holidays, big events, vacation season (especially in Europe) and unreliable weather. Funding has been secured. Now what?

**THE SIX ARCHETYPES OF POWERFUL STUDY TOUR PARTICIPANTS**

- Elected officials (mayors, city councilors) and their key staff
- Executive public agency staff (public works, transportation directors and commissioners)
- Technical and implementation staff (planners, designers, engineers, project managers, and communications staff)
- Community leaders (non-profits, educators, neighborhood associations, advocates)
- Business leaders (Chambers of Commerce, business improvement districts, business owners, visitor and tourism groups, real estate developers)
- Local funders (foundation staff, philanthropists)
Generally speaking, study tour preparation falls into three categories:

I. Enrollment and participant preparation

II. Logistics and operations

III. Agenda design and scheduling

ENROLLMENT AND PARTICIPANT PREPARATION

Pre-trip customer service helps prepare delegates for a successful study tour and mitigates the stresses of travel, allowing participants to arrive focused and ready to work. Collecting contact information of delegates and establishing communication protocols long before the trip will alleviate confusion later. For international trips in particular, it’s important to be considerate of each person’s experience level with travel. Some people are very comfortable jumping on a plane to go anywhere with little preparation; others may be nervous about leaving the country or being away from home and need more support. Provide information early to participants about how and when to buy plane tickets, visa/passport instructions, health insurance, cell phones, credit cards, and other practical information about travel abroad. Be prepared to offer personalized help for those that need it. Organize a pre-trip meeting 6–8 weeks in advance of the trip to disseminate information and to begin the conversation that will take place during the study tour. Create a FAQ page, offer articles and media clippings about the destination, and assemble a simple dossier of delegates with photos and short bios to share with each other and with study tour destination hosts.

It’s very important for delegates who are infrequent or novice cyclists to practice biking a bit before leaving home. A low-stress social group ride (avoiding high-intensity streets that may intimidate riders) can be a great way to start the relationship-building and cultivate a positive group dynamic for the trip. Visiting a local street or corridor slated for improvements that will be discussed during the tour is wise. Consider meeting in a park and having a meal at the end of the ride. Enlist the help of a local bike group or other partner to provide riding skills instruction or rental bikes to less-experienced riders. Just a few rides with a trusted colleague will help build confidence and fitness for less experienced riders and make the first few bike trips in Europe much more enjoyable. Keep it short, simple, and fun — there’s a lot to be gained from a delegate having a great first experience on the bike.
LOGISTICS AND OPERATIONS

Choosing the right venues has a big impact on the overall experience of the study tour. It can be challenging to make good choices without direct experience — enlisting the help of a local or someone with extensive in-country experience is highly recommended. Consider the following factors in restaurant, hotel and speaker venues regardless of the budget you’re working with:

Proximity: Is the hotel or meeting space near public transportation? Is it comfortable and convenient for the whole group to park bikes? What will it be like to get there if the weather is bad? Don’t undervalue convenience when planning group lunches and dinners. After a long day, a 3-minute walk to dinner is much more appealing than a subway ride across town, even to the “perfect” dinner spot.

Atmosphere: Is the hotel located in a neighborhood that inspires excitement about the city? Delegates will spend time here on their own before and after the tour, so make sure it’s a place that leaves a good impression. Is it quiet enough at night for good sleep? Does the lobby have space for delegates to gather for informal conversation?

For restaurants, how will they accommodate a group of your size? Is it quiet enough for the group to have conversation and reflect on the day, yet lively enough to feel like you’re in a thriving city? Strive for variety in food styles throughout the week. Restaurants with private rooms are ideal for conversation, though they can sometimes make delegates feel like they’re missing out on the action. Much relationship building and informal strategizing between delegates happens over group meals. Make sure your choices enable that bonding to happen.

Authenticity: Choices that reflect local character add a sense of authenticity to the experience. Study tour delegates, like most travelers, want to feel like they are experiencing the “real” version of the city they are visiting. Reliance on chain hotels and restaurants can be counter productive to this goal. Study tours are mentally and physically demanding experiences, and the accommodations and meals should reflect the serious professional quality of the event, and provide every possible opportunity for delegates to rest and recharge.

AGENDA DESIGN

The most challenging part of study tour planning is creating the right agenda. If it’s too structured and full, the experience can feel rushed and deny the opportunity for spontaneous discovery. Too loose, and it can feel unprofessional, disorganized and chaotic. To find the right balance, PeopleForBikes employs the 30/30/30 rule for agenda design.
THE 30/30/30 RULE

Here’s our simple strategy for allocating agenda time on a study tour. Roughly one third of your time each day of the tour should be spent doing the following things:

30% Learning: Meeting with experts from the public, private, and non-profit sectors is the most direct way for best practices to be shared and for delegates to network directly with their counterparts in other cities. Powerpoint presentations are the global standard way to tell a dynamic story and convey information. Beware of presentation fatigue, especially among jet-lagged visitors. Encourage speakers to be interactive and limit presentations to 45 minutes at a time and account for breaks and questions. Always make sure that snacks and caffeinated beverages are available!

30% Experiencing: Cities are three-dimensional sensory experiences. The feeling of comfort, belonging and joy while riding a bike in a mature cycling city is the most transformative aspect of study tours, and the one that cannot be replicated by any other means than travel. Spending at least a third of each day outside on bikes is the highlight of the trip for many delegates, and shouldn’t be shortchanged. If you have a group that is particularly bike-focused and experienced with riding, up this to 40%–50%. The simple act of traveling to meetings and meals by bike adds to the experience. Using public transportation provides additional bonding time and insight into the city.

30% Processing: A study tour can present an overwhelming amount of information in a short amount of time. Creating time and space for thoughtful group debriefs is a critical, and often undervalued, part of the study tour experience. Spend at least 1 hour per day digesting the day’s events and talking about how it applies to work back home. Invest in renting a private space for these conversations and plan to facilitate — take it as seriously as any other part of the agenda. Don’t forget drinks and snacks! Hungry people don’t make for great strategists.

The remaining 10% of time should be reserved for unstructured exploration. Encourage delegates to get out in the city on their own. Offer optional early morning rides, and make sure that delegates have access to bikes and maps for after hours adventures. It’s empowering to navigate alone after a week of practicing with a group, particularly for infrequent riders who don’t feel comfortable riding on American streets. The joy of discovery is one of the most rewarding outcomes of travel — allow it to happen!
GROUP SIZE CONSIDERATIONS
The standard PeopleForBikes model for a week-long international study tour is a group of 12 delegates, with a minimum of 3 study tour support staff. We’ve found that 15 people total is the sweet spot between involving as many participants as possible while creating a highly personal experience. Feeling like a “temporary local” is one of the most valued experiences of the trip. Larger groups stand out in almost any city context and can disturb the sense of immersion. Groups larger than 15 take exponentially more time to move around the city, and will nearly always be split at traffic lights when traveling by bike. Some of these challenges can be mitigated by dividing into smaller sub-groups for bike tours and site visits. The quality of bonding between the delegates is very high in a group of 15, with just the right number of opportunities for intimate conversations during down times and meals. Larger groups can be a great way to involve more people, but account for more complex logistics, slower travel times on group rides and in between agenda items in your planning.

For shorter events where there is more of an emphasis on sharing technical content than experiential learning and relationship-building, a larger group can be accommodated with fewer drawbacks.

RISK MANAGEMENT
When it comes down to it, managing risk is about preparation and exercising good judgement. There is inherent risk in travel and in riding bikes. However, proper training of staff, good agenda planning, and common sense can help mitigate those risks significantly. Guides should develop and document protocols for responding to emergencies, including knowing how to access medical care locally and how to communicate if the group is unexpectedly split up or lost. Depending on the laws and litigation culture in your country, it is advisable to carry professional liability, travel, and/or event insurance and have participants complete waivers. Seek advice from lawyers with experience in group travel.
Relationships with experts in the destination city or country are essential for planning a timely and relevant agenda. For international expeditions, both the Netherlands and Denmark have organized Cycling Embassies to help export their countries’ cycling expertise to the rest of the world. These groups are consortiums of public, private and non-governmental organizations with an interest in sharing cycling expertise. They can help connect visitors with consultants, civil servants, academics and other experts for meetings and tours. In addition, a growing variety of consultants, NGOs and other organizations offer similar services to international visitors. It’s important for the American visitor to know that demand for Dutch and Danish expertise is growing rapidly, and many of the well-known destinations are becoming overwhelmed with requests from study tour groups from all over the world. While many are happy and proud to meet with visitors from abroad, please be gracious for time spent with your group, especially from public sector staff. It’s usually not part of their job! Expect to pay for services provided by organizers, speakers and tour leaders who engage with your group. In return, you’ll receive a polished, thoughtful presentation or bike tour from a professional.

The most common pitfall in designing an agenda is scheduling too many presentations, meetings, and bike tours with local experts and not allowing enough time for thoughtful reflection and strategizing. No matter how carefully you plan, there will be pressure to reduce debrief and recap sessions in order to visit more cities, have more meetings, and ride further distances. Resist it. Value debrief time as highly as any other part of the agenda. These meetings are essential for the delegation to build relationships and make plans about what to do back home.
PART II: DURING THE TOUR

THE FIRST DAY

The planning is done. Every detail of the agenda is arranged and confirmed. After a long trip, the delegates assemble, excited, possibly jet-lagged, and not entirely sure what to expect. The first meeting should set the tone for a great trip. Arrange an afternoon welcome reception in or near your hotel on the first day. Choose a comfortable, private space and offer plenty of drinks and snacks. Begin with individual introductions and a brief, but lively (account for the weariness of jet-lagged travelers) primer on practical and cultural must-knows about the host city. Delegates should introduce their personal objectives for the tour. It’s important not to assume any prior knowledge of issues and opportunities back home that may be influenced by the delegation. The opening reception is also the appropriate time to set expectations for punctuality, participation, bike ride etiquette, social media during the tour and other ground rules. It is the time to create an atmosphere of trust in order to encourage frank conversations. Keep the opening short and snappy, and consider incorporating a very short bike ride into your opening day. Tired travelers will appreciate the fresh air.

STUDY TOUR PROGRESSION

THE EMOTIONAL ARC OF THE INTERNATIONAL STUDY TOUR

After observing more than 350 study tour participants on 20+ tours to Northern Europe, we started to notice a pattern in the sequence of emotions experienced by delegates during the study tour. The disorienting nature of overseas travel and the rapid influx of new sensory experiences and ideas leaves most participants initially overwhelmed. That quickly turns to excitement, as visitors delight in the human-scaled charms of Northern European urbanism. Optimistic conversations begin about how to implement the best of what is being seen at home. Inevitably, a dip in enthusiasm follows as the reality of the difficulties U.S. cities face are brought to the foreground. However, with skillful facilitation and goal-setting, participants emerge in a place of confidence. It’s important not be dismissive of the differences between Europe and the U.S. The goal of facilitation is to help delegates identify meaningful action in the areas where they can be influential, working in the context that they know. Some participants pass through this emotional arc within hours of arrival and repeat it many times during the week, others follow it in a single sequence. Some flip back and forth between stages. Showing this graph to the delegates at the opening meeting prepares for productive debriefs and helps mitigate the inevitable dip in energy and morale that comes sometime during the middle of the week.
GETTING ON BIKES: THE SHAKEDOWN RIDE

Long before the study tour begins, it’s important to prepare participants for safe and efficient group travel by bike. In addition to pre-trip opportunities to practice cycling skills, we recommend getting out on bikes as a group as early as possible once the study tour begins, either on the first day of the tour or the morning of the second. The primary purpose of the “shakedown” ride is to assess the bicycling experience of each delegate and give participants the skills needed for safe group riding. The ride should have modest distance expectations (1–3 miles or 2–5 kilometers) and should introduce the delegates to local traffic rules. Start in an empty lot or on quiet streets with basic cycling skills like stopping, starting, signaling, and turning. For experienced riders, these skills may be remedial but it’s important to start slow and together as a group to build the confidence of less-experienced riders. Once you’ve determined the group can safely cycle in public, lead the group on your planned route with a few stops at interesting points to emphasize basic traffic operations and get a taste of the host city. Don’t spend more than 90 minutes total on the shakedown ride — just stick to the basics and make it a fun group bonding experience.

In Denmark and the Netherlands, riding a bike is an entirely different psychological and sensory experience than it is in many U.S. cities. For visitors coming from cities where cars are the dominant form of transportation, comfortably cycling around a planned bicycle city can feel like an alternate reality. While the sophisticated infrastructure and cultural normalcy of cycling in these places makes for an exceptionally safe and pleasant experience, the combination of jet lag, nervousness, and sensory stimulation can make the experience of riding a bike in a foreign city overwhelming at first, particularly for delegates who don’t regularly ride bikes at home. For many American visitors, the biggest traffic stress in the European cities comes not from cars, but from the sheer volume of bike riders sharing the facilities. Starting slow, offering help and encouragement for riders that need it, and carefully planning ride routes to avoid stressful or difficult situations are ways to mitigate the initial “wobbles.” After a day or two of practice, groups will be humming along like locals.
LEADING GROUP BIKE RIDES

Whether domestic or international, guiding a large group on bikes through a city is one of the most stressful times for the trip leaders. There’s more than just safety at stake — if a delegate has an awkward or unpleasant experience with bike riding they’re less likely to go home as a champion. Throughout the week, the group will grow more comfortable with each ride. Expect a different ride leader each day as locals show off their cities. It’s important to calibrate your hosts’ expectations for bike rides with the level of experience of your group. There is a common tendency by enthusiastic ride leaders to overestimate the distance a group of 15+ can travel in the time allowed. For a person who has been riding a bike for a lifetime, it can sometimes be hard to empathize with the level of concentration riding a bike can require for someone who hasn’t done it much. In general, avoid high-stress street situations, expect to go slow, stop often, and always have a shorter ride option prepared.

ACCOMMODATING DIVERSE RIDING NEEDS

Welcoming delegates with a wide range of cycling experience and ability is important to assembling a dynamic and effective delegation, but can present challenges to trip organizers and ride leaders. Delegations may even include participants who are physically unable to ride a bike, but for whom the experience of being part of the study tour delegation is too valuable to miss. It can be a rewarding adventure for an enthusiastic but non-cycling delegate to navigate without two wheels. A combination of public transportation, taxis/or taxi-like services such as Uber, walking, and pedi-cabs can serve 95% of mobility needs and give that delegate a unique perspective on the city that other participants won’t have. Accommodating non-cyclists on a bicycle transportation study tour will require more staffing and financial resources, but it’s entirely possible with rigorous preparation and a positive attitude.

Face the people you’re talking to. • Put the subject you’re talking about behind you. Make sure the sun is not shining in people’s eyes. • Keep the group in close and out of the way of traffic.
MEETING WITH THE LOCAL EXPERTS

Sharing lessons learned and best practices is one of the most efficient ways to spread an innovation through culture and practice. Bonding with peers from other cities in personal, direct exchanges is what makes a study tour different from a conference. The agenda will include meetings with local experts. These will typically be familiar settings for city professionals, with Powerpoint being the tool of choice for sharing data, images, and stories. Prepare the delegates to ask questions before the meeting, and be smart and adaptable with time. Sometimes it’s ok to let a conversation run long if it serves up a great group debrief later or addresses an issue of particular importance. Generally it’s not advisable to let indoor meetings cut into time spent outside. Be sure to carry a USB drive so that you can save presentations; participants will want them after the tour ends while the memory is fresh.

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INFORMAL EXPLORATION

Many of the best moments of the study tour happen during unscheduled times. As a trip leader, it can be challenging to create conditions that allow spontaneous discovery to happen without it being forced. Asking the group to, “Go out and have a personally transformative experience!” is not likely to deliver satisfying results. But it is worthwhile to encourage delegates to explore the city on bikes by themselves in a way that fits in the margins of the agenda. For some, this is the time when all the learning sinks in and confidence around their future decisions to prioritize bicycling is reached. Make sure that delegates have bikes and public transportation passes available for use after hours, and let them know it’s ok to take a spin after dinner or early in the morning. Trust the delegates in their capabilities as explorers and invite them to trust the cities they are exploring.
GROUP DEBRIEFS

Group debriefs are the primary activities that enable inspiration to be converted into action. For this reason, it is important that these sessions be prioritized. This is where the return on investment for the study tour will be realized. Debriefs should be limited to members of the delegation and tour staff — external guests may steer the topic away from change management and how to get things done back home. The need for facilitation varies group to group. It’s generally better to err on the side of formality and make sure that everyone has a chance to participate. Consider asking a question to kick off the debrief. Early in the tour, it can be a general reaction to the day’s meetings, presentations, or bike rides. What was the most important thing you saw/heard/experienced today? As the tour progresses, they tend to be more tactical discussions about issues back home. What did you see/hear/experience that can be applied to Project X in your community? Document key points made in the debriefs, to be shared privately amongst the delegation. Keep it simple: delegates use sticky notes to capture one key idea.

THE FINAL DEBRIEF SESSION: SETTING THE STAGE FOR STRATEGIC ACTION

On the final day of the tour, we recommend allocating a big chunk of focused time, up to 4 hours, for a comprehensive debrief of the week and strategic action planning. Consider renting a formal meeting space with white boards, post-it notes, and a projector. This ensures that you’ll have access to tools for group collaboration, but more importantly it helps set a tone of professionalism and focused productivity. During this final session, the delegates should identify the specific steps to take upon their return home, individually and collectively. Acknowledge that sustaining momentum can be difficult when busy people return home to full inboxes and multiple demands on their attention, but offer tools to help. Consider creating a post-trip communications protocol and scheduling a reunion event so that delegates can provide each other with support and accountability after the tour.

We task each delegation with identifying the strategic actions that they will complete in three time frames:
Next week, in 3 months, and in 6 months. Usually, the delegation focuses on a priority project they wish to advance collectively, and identifies how each delegate can contribute from their unique individual position in city leadership. The actions can be as simple as making a phone call or as ambitious as introducing new legislation or policy. In general, adding momentum to an existing initiative or opportunity is more effective than coming up with something new. Thinking both short and long term allows for broader visions to be articulated, but keeping focus on realistic actions within a 6-month time frame helps keep it tactical and specific. “Change my department’s culture” may be a worthwhile goal, but “give a presentation to my staff about the key learnings from this tour” is a much more tangible and achievable short-term action. The formality of the goal setting will vary depending on the culture of each group, but it’s important to capture the state of mind of the final day of the study tour to remind delegates when you follow up after they have returned home.

QUESTIONS FOR CITYBUILDERS

Changing a city culture is a daunting task for an individual. One of the keys to success in study tours is guiding participants to arrive at what actions they can take as individuals in their unique professional and personal roles. This framework is helpful for thinking about how to make change, by boiling down big transitions to simple, immediate actions.

1. What do I want to change?
2. Why does it matter?
3. Why isn’t it already being done that way?
4. Who do I need to talk to get it started?
PART III: AFTER THE TOUR

SUSTAINING MOMENTUM AFTER THE TRIP

At the end of a successful study tour, the level of enthusiasm for taking action for a better city will be at its peak. But upon returning home, the realities of busy schedules and slow progress will cause an inevitable ebb in momentum and focus. However, a few tools can be employed to help keep delegates engaged and inspired after the trip is over. To start, follow up within a few days after the tour with group photos, presentations and stories. Encourage delegates to share their presentations and reports summarizing the learnings of the tour. We’ve found that elaborate digital collaboration tools or social media sites aren’t as effective as a simple email list. Anything that depends on a login, password, or downloading an app is less likely to be utilized. Make it as easy as possible to share photos, ask questions, or simply express gratitude for the experience.

FOLLOWING UP

Between 4–8 weeks after returning is a good time to reunite the delegation and check in on actions taken since returning. Gathering for a meal, bike ride, or other social event is perfect. Continue to track actions taken, realizing that many of the most courageous steps might have been new opportunities that weren’t identified on the final day of the tour. It’s helpful to refer to goals that were set during the final debrief sessions, but be careful about applying too much pressure or shame if those goals aren’t met. Keeping a positive, trusting atmosphere is more important. It’s the process of intentional goal setting, not the content, that matters most for sustaining momentum. Often, the most useful outcomes of the study tour are personal and very difficult to measure. One of the best ways to measure success is to ask colleagues who work closely with a delegate if his/her attitude has changed. It may not be apparent immediately, but over the long term you will find that attitudes have shifted.

FINAL THOUGHTS

There is wisdom in travel. Not even the most articulate storyteller or most persuasive digital marketing can substitute for an inspiring real-life experience. Even the most established professionals benefit from discovery and exploration of new cities, no matter where they are in their careers. Study tours are not a brain transplant — participating won’t fundamentally change how someone views the world. But they are a potent brain stimulant, and can help leaders find new tools and new allies for making change.
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Zach Vanderkooy has curated and guided more than 25 study tours as part of PeopleForBikes’ Green Lane Project, a national multi-sector partnership of leading cities working to build better bike lanes on American streets. A native of Portland, Oregon, Zach is a graduate of the Harvard Graduate School of Design and the National Outdoor Leadership School. He is the founder of Inspired by Cities, a firm that offers professionally curated study tours for progressive organizations, city influencers and urban visionaries.

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