

# SUMMIT PLANNING FOR DUMMIES



## SO YOU WANT TO PLAN A VIRTUAL REGIONAL SUMMIT!

- Reach out to organizational partners to find one or two partners in your region to plan and produce the Summit with you.
- Conceptualize your summit, both date(s) and design. You'll want at least four months to plan.
- Set goals for your summit: Possibilities include number of registrants or number of attendees.
- Develop a list of possible session topics and identify your "dream" presenters. Create a short description of each presentation as conceptualized. Topic possibilities, customized for your region, include:
  - Beaver ecology
  - Indigenous perspectives on beavers
  - Beavers, habitat, and biodiversity
  - Low-tech, process-based river restoration with BDAs
  - Beavers and agriculture (wider riparian buffers, soil health, erosion, nutrient pollution, conservation easements)
  - Beaver relocation (educate stakeholders on what is involved in running a successful beaver relocation program as well as assessing sites for relocation suitability)
  - Beavers and drought and flood resilience.
  - Conflict resolution with pond levelers and culvert fencing

## Technology

- Invitation/contacts: What software will you use to manage your contacts? Midwest Beaver Summit (MBS) used Brevo to email the invitation to our contact lists.
- Registration: What software will you use to manage event registration? MBS used Eventbrite. We customize it to collect name, title, organization, state, how they heard about the summit.
- Webinar: MBS purchased a one-month subscription to Zoom webinars for 1,000. You'll also need to find someone (probably under the age of 40!) who knows how to run a zoom webinar with multiple presenters.
- Graphic design: MBS used Canva (an online design program) to create social media assets and videos.
- Collaboration with partners: MBS partners collaborate with each other using Google Docs, Google Sheets, and Google Forms.

## Presenters

- Reach out to your "dream" presenters with an outreach email.
- Send a presenter confirmation email.
- Collect speaker bios and photos.
- Create a spreadsheet with presenter contact information.
- Schedule tech checks.



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## Recruit Sponsors and Cohosts

- Create sponsorship descriptions and tiers and a sponsorship interest form.
- Recruit sponsors and co-hosts from your network of environmental nonprofits, watershed groups, land trusts, and allies.
- Collect logos for display on your website, social media assets, and at the summit
- Invite sponsors to submit a 2- to 3-minute promo video; co-hosts to submit a slide for a promo video about co-hosts.
- Set up a virtual meeting with sponsors and co-hosts to review the marketing plans.
- You'll need to send reminder emails for the videos and slides.
- Ensure there is a way for sponsors to pay their sponsorship fees.



## For the Event Itself

- Create a video slideshow of co-hosts plus sponsor videos.
- Create a post-event attendee survey.
- Create your introduction and wrap up slideshows.
- Introductions, sponsors and co-hosts, goals of the day, housekeeping notes, schedule of events.
- Create a Summit schedule to be used to run the Zoom webinar. Collect links to slideshows, promos, images, and copy to put into the chat.

## MARKETING/PUBLICITY

- Invitation list: Go online and build a spreadsheet of contacts with name, title, organization, state, and email.
  - Environmental NGOs and associations from your region.
  - State natural resource management agency employees (Departments of Natural Resources, Agriculture).
  - Local natural resource management agency employees (soil and water conservation districts, highway departments, forest preserve districts, conservation districts, park districts).
  - Land trusts.
  - Watershed groups.
  - Environmental and water lawyers.
  - Tribal natural resource managers.
  - Academia and extension programs.
- Draft your invitation
- Create/update a page on your website with conference and registration information.
- Create a Facebook event and LinkedIn event.
- Create digital assets to share on Facebook, Instagram, Eventbrite page, website, etc.
- Write a press release and distribute to regional media.
- Create a social media schedule for promotion.
  - Every Monday: Email new social media assets to sponsors and co-hosts along with recommended language and other important information and post on social media.
  - Wednesday to Sunday: develop following week's assets.
  - Assets include: Summit information, Summit sponsors and co-hosts, each presenter
- Set up Eventbrite to send reminder emails one week, two days, and one hour before the event.

## POST-SUMMIT ACTIVITIES

- Post presentation videos on YouTube.
- Write a final report.
  - Analyze registrant and attendee data. Sort into states and categories.
  - Analyze survey feedback and adjust for next year.
  - Document all steps so you can replicate the following year.
- Upload registrants to Brevo.
- Send a follow up email to registrants with links to the presentation videos, the chat transcript, Q&A transcript, and the post-event attendee survey.

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