



# GUIDE TO STATE BIKE SUMMITS

The comprehensive manual on how to plan, create and market your next gathering of bike advocates.

LEAGUE OF AMERICAN BICYCLISTS  
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**IMAGES** courtesy of League of Michigan Bicyclists, Bike Texas and Bicycle Coalition of Greater Philadelphia.

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Each year hundreds of cycling advocates come to Washington, D.C. to the National Bike Summit to connect with others from around the country; learn best practices and share ideas; and most importantly, to have cyclists' voices heard on Capitol Hill.

Now entering its 14th year, the National Bike Summit has been effective in promoting a pro-bicycling agenda throughout the halls of Congress.

As beneficial as the event has been on a national level, similar events on a state and even the local level are also proving to be valuable. Fifteen states – and even more communities – have hosted a state-wide summit within the past year, with fantastic, measurable results. Twelve additional states have held bicycling-specific conferences or summits.

- » West Virginia rallied after ranking last in the annual Bicycle Friendly State rankings in 2008, held the state's WV Cycling Symposium and worked their way up eight spots on the list.
- » The Wisconsin Bike Summit lobbied for Complete Streets, \$5 million annual increase in bicycle infrastructure and an anti-dooring law, some of which was voted on and won during their lobby day.
- » The Oregon Summit has won pro-bike legislation and increased dedicated state funding for bicycle projects from 1 percent to 1.5 percent of the overall state transportation budget.

Whether organizing the state's first summit or reenergizing your existing event, this guide shares some of the ideas, lessons and best practices that have come from the National Bike Summit, as well as model state events.

## TYPES OF BIKE SUMMITS

Three types of state bike summits, Training, Conference and Lobby Day, have emerged as the most successful – depending on the desired results. Each type serves a distinct purpose and serves to reach specific end goals.

*Training summits* are the most common and easiest to organize. These events are characterized by little participation beyond the cycling community. Discussions often center on sharing information on local trail projects, club recruitment and retention, ride/event planning and education best practices. While these events serve as a catalyst to bring interested parties from across the state together, they often fall short on the impact that they could have if they combined a lobbying component given the numbers and regional diversity of the participants. Imagine if 50 to 200 participants shared their enthusiasm with their elected officials!

*Conference summits* are characterized by heavy participation from Departments of Transportation and other state agency staff and are often sponsored by a state agency. These summits typically incorporate best practices and training for engineers and planners, marketing discussions for tourism board staff, and/or strategic planning and benchmark setting for an established plan or course of action. Simply put, these are opportunities to roll up the sleeves and work with pre-existing conditions and resources. There is no doubt such gatherings are needed and useful but too often these conference summits fall short of establishing broad-based support for bicycling, new funding sources, or laws and policies that would improve bicycling conditions.

*Lobby Day-based summits* have proven to be an effective means to push pro-bicycling legislation. By bringing cyclists from across the state to meet with their representatives, you not only get to speak personally with your representatives and staff about the established asks, but advocates also have an opportunity to share their unique stories about why bicycling in the state – and the representative's home district – is important.

Each type of event offers a unique direction, resulting in three different outcomes. It is important to stay focused on the desired outcomes. Merging the three types of summits into one large event may attract more participation, but doing so could lead to a large and unorganized summit if not enough planning and volunteers are involved.

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## WHO TO INVITE

Once you've begun establishing the type of summit you hope to put on, consider who to invite and how to get them there.

### BICYCLISTS

Getting bicyclists to your summit seems straightforward. For the most part it is, but focusing some attention towards promotion can ensure good attendance and a cross-section of cyclists. Targeting urban utilitarian cyclists, road cycling clubs, off-road cycling clubs, bike shops, parents involved with Safe Routes to School programs, and the racing community may require establishing new connections – but that is the point. By broadening your scope, you can build a strong and diverse team to work on the thing we're all after- better bicycling, whatever form that takes. Refer to the sample communication pieces for ideas on publicizing your event, increasing attendance and targeting the right audience. You can also search League affiliated clubs, local International Mountain Biking Association chapters and Alliance for Biking and Walking member organizations.

### ELECTED OFFICIALS

Not every state has the same amount of cyclists and cycling advocates, but most have several current or soon-to-be champions of bicycling. State bike summits are a great opportunity to recruit new advocates and support while revitalizing the current bike advocacy base. Regardless of the type of summit, having elected state leaders serve as a keynote or plenary speaker is advantageous for your bike summit – you want state and community leaders on record supporting bicycling.

Your bike summit is also an opportunity to show your elected officials the organizing power of the bicycling movement and to introduce bicycling ideas, policies and programs of which they may not be aware.

When inviting elected officials to participate in the event, start early and repeat often. Elected officials often have full schedules that are filled months in advance. The sooner you contact them and their office asking for their attendance, the better chance they

will be able to make your event. Sending an e-mail or printed request is often not enough. A few days after your request has been sent, reach out to the chief of staff and/or scheduler to ensure that your invitation was received and is being considered. Form letter-styled requests are less likely to be considered, so get personal! Play on your politician's issues, be it support of traffic safety, smart growth, decreased childhood obesity or whatever it is that connects them to bicycling.

Have reasonable expectations of their role in your event. Invite them to participate with a specific function in mind, either as a featured speaker or as a panelist to discuss their work. Keep in mind that you should not expect them to participate as a regular attendee or to stay the entire duration of the summit.

### AGENCY EMPLOYEES

Beyond the State Bicycle Coordinator it can be tough to get additional representatives from the state DOT, Office of Planning, Health Department or other state agencies to your event unless it offers some technical or programmatic benefit to them, so plan accordingly. If you want to see a stronger connection between tourism and bicycling, offer a breakout session on the economic impact of a trail system or cross-state bike ride for example. If you want state engineers to plan for bike lanes in new road projects, bring in engineers who have worked on similar projects on a local level. These peer-to-peer exchanges will be more appealing to agency employees who aren't already sold on bicycling. Also be aware that state agency employees can share information, but cannot offer preference or positions beyond the scope of their office or title.

While weekends often work best for volunteer advocates and cycling club members, the chances of having agency staff show up decreases. The type of event you organize will help dictate which group should take precedence. If your breakout sessions and workshops are offered during work hours and offer professional development credit or are counted as continuing education, it will be more attractive to agencies. You should contact your state's licensing board for more information.







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## ALLIES

Bicycling policy and infrastructure affects more than our two wheels and the surface we ride on. Reaching out to partners in the environmental world, smart growth advocates, public health proponents, seniors, transit and other active transportation groups are essential to building support for bicycling issues and achieving common goals. Also, don't forget about the bicycling manufacturing and retail industry in your state. Be sure that they attend. The economic impact and jobs created through the bike industry can carry a lot of weight. Inviting these groups increases the number of participants at your event, and broadens the impact by showing links to other crucial issues – but don't limit yourself to just them!

## KEYNOTE SPEAKERS

It's in your interest to find someone notable, inspiring and engaging but also think strategically. Outside experts can work wonders and so can giving the floor to an elected official, CEO, or non-bicycling community or state leader. Securing an influential speaker can be a great way to build lasting partnerships that can further your work beyond that of the summit.

Inviting national bicycling organization leaders and staff is a popular option and makes for a notable and knowledgeable keynote, but doing so comes with some caveats. These organizations get lots of requests, often for the same timeframe, so get your requests in early and understand if they must prioritize which ones are attended. Inviting multiple national organizations may show your connection to the greater bicycling world but remember your state's strategic interests make strong local connections. You also run the risk of top-down guidance, leaving a lack of ownership for the follow-up work by your attendees. Also, if a national organization has spoken at your event previously, try someone new! Keeping your event fresh will ensure continued and expanded participation.

## MEDIA

Inviting press through standard press releases (see sample in communication section) can be helpful in reaching traditional media, though to ensure print; radio or television coverage a phone call to the editor's

desk a few weeks in advance can go a long way. Be sure to ask for the person in charge of state and/or local content. Though we all wish the sports section covered more than the occasional Tour de France story, this is about transportation policy! As for web-based media, they are often best reached through e-mail outreach and social networking, both of which are covered under communication.

While media coverage is great – especially now with real-time, web-based media – make sure you establish upfront rules and guidance for the media. If you charge for your event, media should get in for free but often may need to forgo food, registration gifts and other premiums that registration dollars cover. Establishing clear policies upfront can save time, frustrations and potential conflict at your event. See sample Media Registration & Guidelines.

## LOGISTICS

When planning for your summit, be sure to consider and budget for the below key items.

## TIMELINE

Early in your planning establish a timeline of key deadlines for venue reservations, keynote speaker confirmation, registration goals and so forth. The earlier you start planning, the bigger and better your summit will be. Venues and keynote speakers need to be booked far in advance. Opening registration far in advance can create cash-on-hand to help cover early costs. Consider offering an early bird discount rate to encourage this. Be sure to connect the type of event with the date of your event. Hold a training event with heavy club presence during the spring or fall when the weather is pleasant enough for organized rides. If you are planning a lobby oriented summit, or hosting it in the state capital with hopes that state legislators will participate or speak, make sure they are in session at that time.

## FUNDING & BUDGET

When planning for your summit you should find a comfortable balance between providing great facilities, accommodations and speakers while still making the event affordable for volunteer advocates and interested

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everyday cyclists. Seeking grants and sponsorship can help lower registration fees for participants, as well as cover staff time dedicated to the event.

## **SPONSORSHIP**

Recruiting sponsors for your summit may seem daunting, but remember you have a good product that people will want their name attached to – businesses and organizations want to support the bike movement. Establish set sponsorship levels, clearly defined deliverables, and means of recognition for each dollar amount. Try your best to stick to these but allow for some flexibility if a potential sponsor offers some in-kind product, logistical support or media coverage for your summit. Conduct follow-up calls to interested sponsors and answer any questions they may have. Track progress with each potential partner in a database. Note all calls, negotiations and contributions (money, merchandise, food, etc.). Send personalized written thank you notes to each partner/sponsor expressing your appreciation. You cannot skip this step. Send a note when negotiations are successful and again after the summit. A happy sponsor will help you again in the future.

## **REGISTRATION FEES**

Registration fees should cover your estimated logistical costs for the venue, food, printing and other needs. Charging above that to help cover staff costs is acceptable but do not price the event out of reach of would be attendees. Summit fees have ranged from \$50 for one day of sessions without food to \$400 for multiple days including meals.

## **VENUE**

A venue will depend on the type of event you wish to host, the number of participants you expect and the number of days of your event. If your event includes lobbying, find a meeting space on or near the state capitol building. If your summit is multiple days, consider a hotel with conference space. This makes the proximity from hotel to the event much easier, and often includes other logistical needs. If you are not local to the city, where the summit will be held, ask around for local opinions on the venues and hotels you're considering.

Start your venue search process at three to ten months

before the event. Many popular locations are booked years in advance! Also, having a good idea of your total number of attendees is crucial for finding the right venue. If you're unable to make a good guess, try to secure a venue that is fairly flexible with its room sizes. Check on parking (car and bike), accessibility to public transportation, airports and highways. Obviously covered, indoor bike parking is best.

Start the process of finding a hotel at least three months before the event. A good hotel should have the ability to give you a reasonable room block rate, proximity to areas of interest and public transportation in the city, bike parking, and a good in-house catering option or the ability to have outside food brought in for the event. To secure a room block, you will have to estimate how many rooms per night your attendees will need. If not all these rooms have been used by attendees after the summit, your hotel contract will require your organization to pay the difference (the difference is known as the attrition rate). To avoid this, make sure you publicize this room block on your summit registration page! Registrants can use a code when reserving their hotel room to get the discounted rate.

## **AUDIO/VISUAL**

Don't forget to plan for your A/V needs. This equipment may not be included with your venue, so be sure to check and plan accordingly. Make sure that there is a microphone, podium, projector, laptop, screen, and the necessary power strips and extension cords for each room offering presentations. Having an extra laptop and projector on hand is a must. Large flipcharts and markers are also good to have around. It is also important to have at least one staff person or volunteer who is knowledgeable of the systems used designated as the A/V point person in case problems arise.

## **FOOD**

Food can be the toughest logistical item to manage. The two biggest things to remember are: make sure you factor the real cost of it into registration, make sure there is enough of it. Sit down meals are the best, rather than boxed meals or the frantic rush to near-by restaurants. It's always a good idea to have your attendees eat together as much as possible to improve continuity and attendance in your sessions. Also, this provides for great

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networking time, which is a crucial part of any good Summit. Snacks and coffee are also important to keep everyone awake and happy!

Be sure to include on your registration webpage or form a place for people to note dietary needs (vegetarian, vegan, etc.) or allergies so that the numbers can be provided to those preparing the food. Plan for a few extra of these meals to ensure no one goes without.

## VOLUNTEERS

Volunteers serve as resources and organizers that can be crucial to a successful event if your organization does not have a large staff. It's important to know how to find them, work with them, and recognize their contributions. Cycling clubs and local bike shops make for easy pools of eager volunteers. If the summit is held somewhere different than the hometown of the sponsoring organization, finding local support can be crucial in ensuring the Summit preparation runs smoothly. When asking someone to be a part of the organizing, make sure your expectations are clearly outlined, as well as the time commitments and tasks involved. Meetings should occur as needed and be convenient for everyone involved. Some people might not have time for regular team meetings but wouldn't mind if you called on them to help with specific tasks. These roles might not be apparent right away; once you begin planning, you will be able to identify who can help with what.

## SESSIONS AND ASKS

Planning breakout sessions at your summit is determined by the direction you want your event to take and who you hope will attend. If your goal is to operate on a big tent theory, make the event as open and accessible as possible and offer a good mix of breakout sessions.

- » Offering introductory sessions may seem as though the bicycling movement isn't moving forward but as we continue to grow and attract new advocates and participants, it is important to offer basic information to bring newcomers up to speed.
- » Whether dealing with Complete Streets or changing drivers' education requirements, policy oriented workshops have their place in shaping how funding flows and programs are implemented. Creating time to share best practices and learn from others' successes can have meaningful effects beyond your summit.

» Should bike lanes be -four or -five feet-wide? What makes a good bicycle master plan? Offering design, engineering and policy sessions are a great way to attract agency staff participation. They can be great ways to reach out to new, eager staff as well as educating tenured, skeptical attendees on new ideas and standards.

» Not everyone wants to discuss white-paper policies or argue over design guidelines. Many advocates prefer to focus on the 'soft E's' of Education, Encouragement and Enforcement. These issues certainly have their place and can go a long way in improving and promoting bicycling. Organizing sessions on promoting Bike to Work Day, working closer with law enforcement or sharing bicycling education techniques offer valuable information and broadens the reach of your event.

## LOBBYING

Meeting in person with elected officials and/or legislative staff is the most effective means of political advocacy. Taking your message to elected leaders is the basis of our democracy, and you should exercise your right. Here are some important suggestions that should take some of the guess work and intimidation out of organizing lobbying efforts. Ensure that your State Capitol visits are successful and effective:

As discussed with establishing a timeline, learning when legislators are in session is a must, and pre-arranging meetings for participants will ensure they get into the offices during your summit. Organizing meetings a month out should give you a sense of which districts will need meetings as well as plenty of notice to legislators' offices.

Participants should prepare carefully and thoroughly before meeting. Take the time before arriving to know your legislator(s) by reviewing their website to learn more about issues that may be of importance to them, to find out what committees they are on, and to see what leadership positions they may hold. Establish a district or region contact to develop a meeting agenda that participants can clearly understand.

Take a few minutes to review the bills you will be asking your members to co-sponsor and see if your member has already co-sponsored – if so, simply thank them for



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co-sponsoring and put your focus on other bills they have not co-sponsored.

Know what you are there to ASK of your legislator and be prepared to make your case. Your goal is to get your elected officials thinking about you and your issues for longer than five minutes – making the ASK helps you achieve that goal.

You should also be aware that many of the meetings will actually be with staff. Many grassroots advocates underestimate the important role of legislative staff. A supportive staff person can often make the difference between success and failure. Staffers play an invaluable role in shaping a legislator's agenda and position on issues. It is important that you make every effort to cultivate a positive working relationship with staff. Over time, staff may even come to regard you as a helpful resource for information on your issue.

If you do meet with a staffer, most likely it will be with the legislative assistant (LA) who handles transportation and/or natural resources and the environment. Remember that you are the expert. Many staff handle multiple policy issues and may not be familiar with all the details about our issues. Fortunately, you're there to help them out on bicycling.

Stay on message, stick to the issue(s), state only a few key points in support of your position and make a definite request for action. Many meetings are ineffective because a participant brings up other issues or strays from the key arguments supporting your position. Have a message and stick to it.

Your effectiveness is based on geography. Legislators want to hear your thoughts and opinions because you are a constituent. One of your most useful strategies is to relate the issue and your position to your community. Legislators have many other avenues to get national or state analysis, reports and statistics. Excellent local success stories and examples are critical in making the case for the summit asks. So if it is relevant to the ASK - Do not be afraid to humanize the issue by relating it to your local community or personal experience.

Participants may also have other issues you want to discuss with legislators – encourage them to ask for a meeting back in their home district to address these. There is considerable power in having a simple, uni-

fied and consistent voice when representing the bicycle movement; covering the specific asks is the priority for this one day.

Prior to the meeting, have participants give some thought as to whom in the delegation might be best suited to make the request based upon what you know about the member or staffer. For instance, there may be someone in your group that has a good relationship with the member or staff you are meeting with. Additionally, a business person may be better suited to speak to a more conservative member, while an activist might be better suited to lead if the meeting is with a more progressive member.

Do not forget why you are there – it is appropriate and expected that you will make a request at your meeting. The key is to make sure that your request is clearly articulated and actionable by the legislator. It is always best to make a direct and specific request that is tied to pending legislative activity (if possible). For example, ask that a legislator co-sponsor a bill. You should make reference to bill numbers and be knowledgeable about the status of the bill. Making a specific request gives you the opportunity to evaluate the legislator's response.

Finally, thank the Member and/or staffer for taking the time to meet with you and your delegation to discuss our legislative priorities for the 2010 legislative session. Following up after a meeting is almost as important as the meeting itself. Send a thank you letter after the meeting that not only expresses appreciation but reinforces your message and any verbal commitment of support made by the legislator or staff. Not many people take this simple step – you'll stand out positively if you do so!

If you promise during the meeting to get back in touch with additional information, be sure that you do so. Failure to follow up on your promise will call your credibility into question. Follow-up is important, even if the legislator does not agree to support your request, because you are building a long-term relationship. Also, don't forget to have participants report the results of meetings back to the sponsoring organization staff.

This information is vital to coordinating overall legislative strategy and evaluating the impact of advocacy efforts. One person in each meeting should be assigned to take notes.

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## COMMUNICATIONS

Your state bicycle summit's success is a direct correlation to effective communication. First, identify who your key audience is, media and otherwise. Keep contacts aware of all summit news prior and during the event (consider e-newsletters for large contact lists).

Develop a uniform marketing campaign, including a logo and theme. The importance of quality graphics and simple, clear text cannot be over-emphasized! Enlist the help of professionals, if possible. Additionally, make promotional materials available on your website for free promotion for media, fellow advocacy organization supporters, and guests to post on their Web sites and blogs. Make sure they link your promotional materials to your summit's Web page.

- » Create a clear and informative website complete with: general info, registration, travel and hotel logistics, FAQs, sponsorship info, an agenda, media guidelines, and pertinent links.
- » Recruit volunteers to distribute promotional materials and spread the word. Encourage fellow Facebook, Twitter and other social media friends to spread the word and share your Summit's Web site.
- » Don't forget to brand everything consistently! This includes PowerPoint slide-shows that you will use at the event.

## MARKETING 101

Make a list of all the newspapers, magazines, TV and radio stations in your state. Be sure to include any journalists who have written about or have shown an interest in bicycling and transportation needs or projects in the past. Appoint someone from your organization to act as the media contact, and assign them to maintain regular contact with journalists, perhaps by inviting them on rides or to events. Mail them copies of your organization's and event's materials. Prepare a press kit to be sent to every media outlet available two weeks before the event and put this information on your website. The press kit should include:

- » A fact sheet containing a statement of your group's purpose, a count of your members and list of officers, especially if they are well-known members of the state

- » Statistics about bicycling enhancements, transportation projects and improvement needs
- » Event agenda

Be sure to notify reporters and editors who have received your press kit if a meeting or event on the agenda is canceled or changed. Daily morning newspapers usually need all their stories in by the late afternoon the day before publication. Weekly newspapers need community meeting dates and event information at least a couple of weeks in advance. Monthly publications work many weeks ahead of time, and need two to three months, or more, warning of upcoming events. TV and radio can be timelier than print media, yet cannot go into the depth of a printed piece. Plan your agenda with these deadlines in mind. Prepare several press releases and a resource list of who should receive the press releases.

## INTERVIEWS

TV and radio will, if they cover your event, want an interview with a spokesperson. Here are a few tips:

- » We recommend that leaders in the state's bicycle advocacy movement be interviewed, especially: state advocacy organizations' executive directors and politicians who support bicycling.
- » Always mention the name of the summit's website and hosting organization when speaking.

## SOCIAL MARKETING

In addition to creating an event website, using social marketing tools such as Facebook, Twitter, and YouTube (make your summit's commercial go viral!), can catapult your summit to an even larger audience. Consider including a share-this type of tool; it makes sharing information online instantaneous and effortless, and your summit will have wide-reaching presence.

Social marketing reaches every age group, including the younger demographic that will keep the bicycle advocacy movement alive. Additionally, contact organizations that might provide a link on their website from your summit logo to your website.

Maintaining an event blog that is updated frequently will generate interest and enthusiasm around your summit and your organization's reason for holding the event. Include a share-this tool on each blog entry so

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social networkers will consistently post your summit blog posts.

Consider sending bi-weekly e-newsletters updating your contacts on new speakers, registration, bills and projects – anything that is new and related to your summit. Try to not repeat information in your bi-weekly e-newsletters to keep content fresh. You will maintain a higher readership with consistent new information.

Make sure logistics for your summit happen as described in the news release — right place, right time and don't forget the date! If you do not have a communications director in your organization, assign one staff person or volunteer to serve as the point person. All media people should be directed to this one person, who should be easily recognizable. This person should have extra copies of the original release and any other relevant information.

The most common way of contacting the media is a press release. One simple rule is to try and make the journalist's job as easy as possible and follow a format they can use and recognize most conveniently. Keep releases as short as possible! One page is key. See sample press releases.

Remember to use all communications forums. Roughly, you will have a 30 percent readership with each outlet: website, E-newsletter, social marketing, media (TV/Newspaper/Radio) and press releases. Combine these outlets and your event is sure to be well attended and a success!



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## ADDITIONAL INSIGHT FROM ADVOCACY ORGANIZATIONS

*from the Alliance for Biking & Walking listserv*

### ROBIN STALLINGS, BIKETEXAS

BikeTexas hosts a state lobby day called “Cyclists in Suits” during the biennial legislative session in odd numbered years on a Monday. The offices are open and the weekend helps advocates with the travel times. Friday is also a bad day to visit legislative offices. We typically have about 100 participants.

BikeTexas also co-produces a three day biennial conference called “Texas Trails and Active Transportation Conference” in even numbered years. About 300+ professional planners, engineers, bicycle coordinators and elected officials plus advocates attend. It is Tuesday through Friday. A few years ago we tried a special advocacy focused day on Saturday but turn out was not very good so we have discontinued it for now. The most committed advocates seem to find a way to participate on weekdays. Government employees and professional planners etc. do not seem to like Saturdays.

If we called either event a “state bike summit” it might attract more advocates, at the cost of many professionals. If it were a local event for volunteer advocates it might work well on Saturday.

### NANCY SHULZ, VT BIKE/PED COALITION

In preparation for her organization’s annual Summit, Nancy Shulz of the VT Bike/Ped Coalition contacted the League of American Bicyclists to collect recommendations on other states’ bike summits. She wrote to 10, of whom five responded. Their comments are summarized below.

#### *Single-day or multi-day conference?*

New England Bike-Walk Summit: Single day  
Bike Walk Connecticut: Single day  
Georgia Bikes: Multi-day  
Memphis: Multi-day  
Bike Delaware: Single day

#### *Day of the week? Beginning and ending times?*

NE: Friday from 9 to 5  
CT: Saturday from 9 to 2  
GA: Friday to Sunday, 8 to 5  
TN: Wed pm to Friday am  
DE: Wed, from 9 to 4

#### *Eleven of the sixteen bike summits are held in the fall*

1 in February  
1 in March  
2 in May  
1 in June  
2 in September  
6 in October  
3 in November

#### *Which topics generated the most interest?*

NE: Advocacy strategy and funding  
CT: Funding  
GA: DOT reports, keynote speakers, women’s forum, crash response/PR  
TN: Topics selected by host cities that allow them to showcase efforts currently underway  
DE: LAB’s Bicycle-Friendly States ratings (released same day as summit)

#### *Format?*

NE: Plenary, concurrent breakouts, keynote luncheon, concurrent breakouts, cocktail reception  
CT: Plenary, keynote, breakouts  
GA: Plenary, breakouts, keynote, breakouts, closing plenary  
TN: Plenary and breakouts  
DE: Talks similar to Bike Maryland’s symposium

#### *Most popular speakers?*

NE: Mark Fenton and Tim Blumenthal  
CT: All speakers were popular  
GA: Keynote, local leaders  
TN: LAB, state DOT officials, and mayors  
DE: Professor Peter Furth from MA discussing low-stress bicycle routes/networks

### *How did you handle food?*

NE: Buffet lunch partly covered by registration fee and partly by corporate sponsor

CT: Light continental breakfast and lunch were included in registration fee, which was too low (but still got complaints); members who registered early paid \$20; non-members who registered late paid \$45

GA: Meals covered by registration fee

TN: All meals covered by registration fee (Wed: light appetizers and drinks; Thurs: continental breakfast, box lunch, evening reception with heavy hors d'oeuvres/alcohol); \$25 for early registrants; \$50 otherwise

DE: Meals were provided at no charge to attendees

### *Recommendations and other comments:*

CT: Lots of work for low turnout but high marks from attendees. Will probably do every other year.

GA: Give yourself six months; solicit breakout session proposals; have a theme

### **JAMES WILSON, BIKE DELAWARE**

Our state summit is planned to coincide with when the Delaware General Assembly is in session. So it has to be on a Tuesday, Wednesday or Thursday.

### **MARK WYATT, IOWA BICYCLE COALITION**

Our summit is a little different. We bring together community leaders, engineers, planners and teach how to build better facilities. The above mentioned people will not show up on a weekend, so we do that session on Friday. On the following Saturday, we gather the advocates.

### **CHARLENE WALLACE, LOCAL MOTION**

Vermont uses this format as well-- a technical luncheon on Friday to which planners, consultants, advocates, and public works officials will be invited, and a Summit for the general public on Saturday, which will be held from approximately 10am - 3pm.

We're collaborating with several organizations:

VTrans (VT DOT)

Chittenden County Regional Planning Commission

Local Motion (non-profit advocacy & education)

VT Bike/Ped Coalition

AARP

UVM Transportation Research Center

VT Safe Routes to Schools

It is funded primarily by VTrans (VT DOT) and the Chittenden County Regional Planning Commission, and by sponsorships.

### **JESSICA ANDREWS GIARD, SOUTH DAKOTA BICYCLE COALITION-**

We, the South Dakota Bicycle Coalition, hosted a bike summit in South Dakota in 2011. It was a one day with a pre-event social on Friday night.

We hosted Ann Freiwald with Alta to speak on bicycle-friday infrastructure and Ginny Sullivan with Adventure Cycling to speak on bicycle tourism as our main speakers. Then, we had breakout sessions on bicycle education, funding, Safe Routes, trail building, etc. We packed a lot into one day. Hosted in January.

We were planning on a summit in September 2012 but that fell through. The idea was to host Bill Nesper as our keynote and continue with the breakout sessions and incorporate more networking opportunities & opportunities for input on strategic planning for South Dakota bicycling. Also to include a ride to showcase the local bike friendliness (great idea; this was part of the Alliance's campaigns training I did in Iowa and it helps build relationships).

In the event evaluation for our summit, attendees found networking most valuable. So, if I were to plan another summit, I'd build in more networking and less 'being talked at.' With about 810,000 people in our state, building a statewide community around bicycling is elemental.

We also used Jeremy Grandstaff from the Alliance for input and ideas. He was excellent.

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## SAMPLE TIMELINE

### 3 MONTHS OUT

- Reserve location
- Reserve hotel block (if applicable)
- Invite keynote speakers
- Mail out Save the Date card to constituents
- Send out initial press release
- Send out sponsorship requests
- Begin request for breakout session/workshop proposals

### 1 MONTH OUT

- Confirm all speakers and breakout session presenters
- Ensure registration is open
- Confirm food, equipment and AV reservations and orders
- Recruit volunteers (if applicable)
- Confirm sponsorship; have received all logos
- Begin ordering signage and other printed materials

### 2 WEEKS OUT

- Collect in-kind items and give-aways from sponsors (if applicable)
- Develop site plan and staff/volunteer internal schedule for day(s) of event
- Further push for participant registration: email blast, social marketing, etc.

### 1 WEEK OUT

- Confirm speaker and presenters arrival times; request presentations in advance
- Begin packing swag bag with materials, in-kind donations (if applicable)
- Purchase/gather pens, markers and other materials
- Secure event bike parking materials (if applicable)
- Reach out to news desks for television or in-depth print media you want to cover event



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## **2 DAYS OUT**

- Send out general press release
- Walk through event timeline and facilities with staff and volunteers
- Pack up materials for delivery to Summit location
- Test AV equipment especially laptops and projectors
- Close online registration (if applicable)

## **DAY BEFORE**

- Begin setup of Summit at location
- Ensure signage is in proper location
- Confirm food and related equipment
- Print registration lists and name badges (if applicable)

## **DAY AFTER**

- Send press release with successes/highlights of Summit
- Send thank-you's to Summit sponsors
- Thank volunteers
- Collect and sort feedback or comment forms
- Sort signage and other event materials for those that can be re-used for next event
- Return rented or borrowed equipment

## **1-2 WEEKS AFTER**

- Follow-up on action items and/or legislative asks that were a result of Summit (if applicable)

## **1-2 MONTHS AFTER**

- Begin booking venue and facilities for next year's Summit

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## EXAMPLE PRESS RELEASES

Contact:

Jerry Norquist  
Cycle Oregon  
503-287-0405, x102 OR  
503-880-3012  
jerry@cycleoregon.com

FOR IMMEDIATE RELEASE

### FOURTH ANNUAL OREGON BIKE SUMMIT WILL TAKE ADVOCACY MESSAGE DIRECTLY TO LEGISLATORS

*April 21-22 event in Salem will address state and federal efforts to further cycling issues, and send attendees to the State Capitol for face-to-face lobbying*

PORTLAND, Ore. – April 9, 2009 – The fourth annual Oregon Bike Summit, to be held April 21-22 in Salem, will bring together more than a hundred people interested in cycling to coordinate their advocacy efforts and continue to develop Oregon as a premier cycling-friendly state. This year's emphasis will be for attendees to engage in direct lobbying sessions with Oregon legislators.

The event is being held in Salem to provide easy access to state lawmakers. Following group discussions on state and federal issues – including the upcoming reauthorization of the Federal Transportation Bill – participants will receive lobbying training. For the second day of the event, appointments have been made with virtually every Oregon legislator, giving attendees the chance to put a unified and personal face to cycling issues.

“As we continue to advocate for a variety of cycling-related issues in Oregon, it's crucial that we deliver our message directly to our legislators and let them know exactly what we're asking for and why,” said Jerry Norquist, Cycle Oregon executive director and organizer of the Oregon Bike Summit. “Sending this large group of passionate bicycle advocates to do direct lobbying is a great way to have a major impact on future legislative decisions.”

Legislators have also been invited to join the Summit's Wednesday-morning bike ride for informal conversations, and there will be networking sessions at the end of each day. Topic highlights include a recap from the recent national bike summit, an update on state and federal legislative efforts, the unveiling of a new Travel Oregon Web site devoted to Oregon cycling, and a discussion of the challenges facing multi-modal transportation planning. In addition, breakout sessions will cover bike boulevards, Oregon State Parks' scenic bikeway program, bike tourism in rural Oregon and local advocacy strategies.

Event speakers include Oregon state senators Floyd Prozanski and Jason Atkinson; Tim Blumenthal of Bikes Belong; Gail Achterman of the Oregon Transportation Commission and Scott Bricker of the Bicycle Transportation Alliance.

Event registration is \$100, and vendor exhibits are also available; information is available at [www.oregonbikesummit.com](http://www.oregonbikesummit.com) or at 503-287-0504, ext. 103.

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Contact:  
Jerry Norquist  
Cycle Oregon  
503-880-3012  
jerry@cycleoregon.com

FOR IMMEDIATE RELEASE

## LOBBYING ON TWO WHEELS: ADVOCATES TO RIDE WITH LEGISLATORS AT OREGON BIKE SUMMIT

*Morning ride April 22 in Salem will bring together cycling advocates and politicians*

PORTLAND, Ore. – April 20, 2009 – The fourth annual Oregon Bike Summit, April 21-22 in Salem, is emphasizing direct lobbying of state legislators on bike issues. And the event will offer a unique way to do just that: a group bike ride that includes both advocates and politicians.

At 7 a.m. on Wednesday the 22nd, riders will meet on the steps of the Capitol and set out on a moderate five-mile route through the city. Event organizers have invited every Oregon legislator, even offering to provide bikes and helmets. A group of politicians including senators Jason Atkinson, Jackie Dingfelder and Floyd Prozanski as well as Salem Mayor Janet Taylor have accepted the invitation to ride.

“We’ve also made traditional appointments to meet with legislators in their offices Wednesday, but riding together provides an ideal opportunity to discuss the benefits of biking in a relaxed environment,” said Jerry Norquist, executive director of Cycle Oregon and the Bike Summit’s organizer. “What could be more effective than riding along next to someone, talking about cycling while you’re doing it? It’s personal, it’s relevant, it’s healthy and it’s a great way to start the day.”

The fourth annual event is being held in Salem to provide easy access to state lawmakers. Following group discussions on state and federal issues – including the upcoming reauthorization of the Federal Transportation Bill – participants will receive lobbying training. For the second day of the event, appointments have been made with virtually every Oregon legislator, giving attendees the chance to put a unified and personal face to cycling issues.

“As we continue to advocate for a variety of cycling-related issues in Oregon, it’s crucial that we deliver our message directly to our legislators and let them know exactly what we’re asking for and why,” said Norquist. “Sending this large group of passionate bicycle advocates to do direct lobbying is a great way to have a major impact on future legislative decisions.”

Event registration is \$100, and vendor exhibits are also available; information is available at [www.oregonbikesummit.com](http://www.oregonbikesummit.com) or at 503-287-0504, ext. 103.



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## MEDIA REGISTRATION AND GUIDELINES

The [INSERT YOUR EVENT NAME] is open to print, online and broadcast news media, as well as health, advocacy and industry reporters, and freelance writers on a verifiable assignment from an established news source. Complimentary meeting registration will be available to members of the media who provide appropriate press credentials and identification.

Members of the press are advised to pre-register for [INSERT YOUR EVENT NAME], however, continue to offer onsite press registration as well.

Please note that you will have to show proper identification once inside the [INSERT YOUR EVENT NAME], which will be located onsite in the [INSERT LOCATION]. Business cards do not count as identification.

### MEDIA REGISTRATION

All media must contact [STAFF MEDIA CONTACT] with appropriate press credentials and identification.

[INSERT YOUR EVENT NAME] Media clearance is the ultimate, binding decision of [YOUR ORGANIZATION]. Media clearance or non-clearance is final and cannot be disputed.

All [INSERT YOUR EVENT NAME] sessions are open to registered members of the media.

Registered journalists must wear/display their official [INSERT YOUR EVENT NAME] press badge at all times while onsite at the meeting.

Exchanging, loaning or borrowing of [INSERT YOUR EVENT NAME] press badges is strictly prohibited.

### CAMERA CREWS/FILMING

Camera crews filming in onsite meeting areas, luncheons, events and receptions must make prior arrangements with [STAFF MEDIA CONTACT].

Filming inside the sessions is prohibited unless special permission has been granted by [STAFF MEDIA CONTACT].

Filming inside the exhibit area is prohibited unless prior arrangements have been made through [STAFF MEDIA CONTACT].

### MEALS AND RECEPTIONS

Meals and receptions are not included in media registration.

Meals and receptions can be purchased on an individual basis through e-mailing [STAFF REGISTRATION CONTACT] or purchasing at the day of the event.