

CHECKLIST | GENERAL EVENT PLANNING

Presented by Butler Byers Insurance Ltd

Date:

Review conducted by:

As an event organizer responsible for the brunt of event planning, your job can be difficult and multifaceted. Use this checklist to keep track of everything and to ensure your event goes off without a hitch. The following list is not exhaustive—make sure you consider hazards and issues specific to your event.

PRE-PLANNING	YES	NO	N/A
Have you chosen an event team and decided on everyone's roles?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Is there a clear understanding within the organizing team of who will be responsible for what?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Will you involve your workers during the planning of the event?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Will you coordinate with other agencies during the planning?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you know who you want attending your event?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Have you calculated how many people you expect (both maximum and minimum) and what facilities you will need?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Have you decided on admission prices?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you know what bookings, permissions and licences your event needs?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Have you assessed your event's risks and prepared a safety plan?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

BUDGET	YES	NO	N/A
Have you compiled a realistic budget?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does your budget include all foreseeable costs?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Have you underestimated your event's income and slightly overestimated costs to avoid any surprises or financial disappointments?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Has the budget been approved by all stakeholders?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Will you cover expenses by charging, for example, admission fees?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

This checklist is merely a guideline. It is neither meant to be exhaustive nor meant to be construed as legal advice. It does not address all potential compliance issues with federal, provincial or local standards. Consult your licenced commercial property and casualty representative at Butler Byers Insurance Ltd or legal counsel to address possible compliance requirements. © 2017 Zywave, Inc. All rights reserved.

VENUE	YES	NO	N/A
Is the cost of the venue within your budget?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Is the venue available on the date and at the time required?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Is the venue big enough, with enough seats, tables, toilets, etc.?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Is the venue accessible for people with disabilities?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does the venue require a deposit? Would you lose it if you had to cancel the event?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

TRANSPORT	YES	NO	N/A
Do you know how people will get to the event?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you need to put up signs on the surrounding roads to make the event easier to find?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Is the venue area's transport infrastructure sufficient to handle the expected number of attendees?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Are there steps you can take to stop cars getting stuck due to inclement weather, particularly as they enter or leave the parking lot?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Have you booked any necessary transport in advance?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

PROMOTION	YES	NO	N/A
Do you know who your target audience is?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you have an online network you can invite or ask to help publicize your event?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you need invitations or posters to promote your event?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Have you decided where to distribute posters?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Can you create a social media group or event, or post a status or tweet about your event?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you need to send a press release to local papers or radio?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

EQUIPMENT	YES	NO	N/A
Do you need any special equipment?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Have you determined what, if any, electronic equipment you need, such as a TV, DVD or CD player, PA system or microphone?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Have you researched the price of renting your required equipment?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you need to put down a deposit to rent equipment? Would you lose the deposit if you had to cancel the event?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

INSURANCE	YES	NO	N/A
Do you have public liability insurance?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does your insurance policy cover all of your event's risks?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
If you are renting or using someone else's building, are you covered by the owner's insurance?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
If you are hiring equipment, are you covered under the letting company's insurance?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
If external businesses are providing services such as food or rides, do they have their own insurance?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

HEALTH AND SAFETY	YES	NO	N/A
Have you assessed all possible risks of somebody being harmed by a hazard, and how serious the harm could be?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Have you determined how accidents could happen and who is most likely to be harmed?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Have you determined what you need to do to control the risks and make the event safer?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Have you designed the best layout for the event that would ensure people and vehicles can move about safely?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Have you considered the number of people attending the event in relation to entrances and exits to prevent overcrowding?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you have a plan to prevent slip and trip hazards?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Have you made sure any structures you rent have an up-to-date inspection certificate and that they are used in accordance with manufacturer's instructions and guidance?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do you have adequate first-aid arrangements?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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Do you have access to a “trip device” to ensure that the electricity is promptly cut off in case of emergency?			
Are the venue’s fire alarms working?			
Are the venue’s fire exits obvious and clearly signposted?			
Does your team know who is responsible for evacuating the building in case of emergency?			
Do you know where the fire safety equipment, such as fire extinguishers and fire blankets, is located?			
Is there suitable access for emergency services?			
Do you have a plan to keep fire exits free from obstruction?			