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# Volunteer Coordinator Resource Guide

# How this guide is organized

This is the complete Volunteer Resource Guide. It opens with an executive summary, a short how-to-use page, and the reading order. After that, each template appears with its own front matter on top, under a heading that begins **"Front matter:"**, followed by the template itself.

To pull out a single template, split at each **"Front matter:"** heading. Everything from that heading down to the next one is one standalone document: the front matter plus its template.

# Executive Summary

Across the Creston Valley, a lot of community life happens at events. Fall fairs and farmers markets, festivals and fundraisers, concerts, tournaments, and celebrations bring neighbours together, raise money for local causes, and give visitors a reason to stop, stay, and spend. Most of these events are run by volunteers. Often it is the same small group of people, giving their evenings and weekends because they care about where they live.

That model is generous, and it is fragile. Volunteer-run events face a familiar set of pressures:

- **Small teams carry a heavy load.** A handful of people cover planning, money, safety, marketing, permits, and cleanup, usually on top of jobs, family, and other commitments.
- **Budgets are tight.** Every dollar is watched, and there is rarely money for professional event staff or software.
- **Knowledge lives in people's heads.** When a long-serving organizer steps back, years of "how we do it" can leave with them. The next volunteer often starts from scratch.
- **Expectations keep rising.** Safety, accessibility, privacy, insurance, and gaming rules all apply to community events, and the requirements are not always obvious to a new organizer.
- **Time is the scarcest resource.** Volunteers want to run a good event, not build systems and paperwork from nothing.

Local events are worth protecting. They give people a sense of belonging and a reason to take part in the life of the community. They support local vendors, artists, and businesses, and they draw visitors into the valley. They are also how new volunteers get involved, which keeps organizations alive from one year to the next. When a community can gather well, it is stronger for it.

This guide is built to take pressure off the people doing the work. It gathers the practical documents an event organization needs into one place, with plain-language instructions and templates you can copy and adapt. Using it, an organization can:

- Spread the workload across a team instead of leaning on one person.
- Hand over roles smoothly when volunteers change, because the process is written down.
- Meet its obligations around safety, cash handling, privacy, insurance, and accessibility with less guesswork.
- Spend less time reinventing paperwork and more time on the event itself.

You do not need to adopt everything at once. Start with the documents that match where your organization is today, and add the rest as you grow. The goal is simple: help good local events keep happening, run by people who feel supported rather than stretched.

# How to Use This Toolkit

**Who this is for.** Boards, committees, and volunteer organizers planning community events in the Creston Valley. No prior experience with formal event documents is assumed.

**What is inside.** A main guide (safety, waivers, and code of conduct) plus a set of standalone templates for planning, money, people, assets, marketing, and accessibility. Each one carries a short front matter block with three parts: **Why It's Important**, **How to Use**, and **What You Need**.

**How to start.**

1. **Read the executive summary and this page.** They frame why each piece exists.
2. **Pick your starting set.** If you are new or rebuilding, begin with the twelve documents listed in *Suggested Documents for Event Organizing Groups*. Those cover the basics.
3. **Copy templates into your own workspace.** These files are Markdown. Paste them into Google Docs, Word, a spreadsheet, or your project tool, then replace the bracketed placeholders such as [Organization Name] with your details.
4. **Assign an owner to each document.** One named volunteer keeps each template current. Write the name and the review date at the top.
5. **Store everything in one shared place.** A shared drive folder that the whole committee can reach protects you when a volunteer is away or moves on.
6. **Review once a year.** After each event, update the template with what you learned. Next year's team inherits a working system instead of a blank page.

**A note on legal and insurance items.** Some templates touch on waivers, insurance, privacy, and gaming rules. These are starting points. Have your board confirm anything binding with your insurer or a qualified advisor before you rely on it.

# Reading Order

1. Executive Summary
2. How to Use This Toolkit
3. Suggested Documents for Event Organizing Groups
4. Master Event Planning Checklist
5. Event Timeline
6. Budget
7. Financial Policy
8. Volunteer Database
9. Volunteer Resource Guide: Safety, Waivers, and Code of Conduct
10. Asset Management
11. Marketing Timeline
12. Accessibility Checklist
13. Sources

**One note on sequence.** Accessibility sits near the end because the checklist is used close to the event. Accessibility decisions start much earlier, at the moment you choose a venue and a date. Read the Accessibility Checklist early even though you complete it late.

# Front matter: Suggested Documents for Event Organizing Groups

## Why It's Important

Every well-run event organization stands on a small stack of documents: how it is governed, how it handles money, how it manages volunteers, and how it plans and runs events. This reference list shows what those documents are and which ones matter most when you are starting out. Think of it as a shelf inventory. You may not need every item on day one, but knowing what belongs on the shelf helps you fill the gaps in the right order and shows sponsors, insurers, and grant providers that your organization is organized and dependable.

## How to Use

1. Read the full list once to see the range of documents an event organization can hold.
2. Go to the section titled *If you're just starting out* and treat those twelve items as your priority.
3. Mark each item as **have it**, **need it**, or **not applicable**.
4. For each **need it**, check whether a template in this toolkit already covers it, then adapt that template.
5. Bring the list to a board or committee meeting and assign an owner and a due date to each gap.
6. Revisit the list once a year, since your needs change as the organization grows or incorporates.

## What You Need

- A board or committee meeting to review the list together.
- An honest look at what your organization already has on file.
- A shared folder where completed documents will live.
- Awareness of your legal status (unincorporated group, incorporated society, or registered charity), since that affects which documents are required.

# Event Ready Suggested documents for event organizing groups

## Foundational Documents

- Mission, vision, and values statement
- Constitution or bylaws
- Articles of incorporation (if incorporated)
- Organization chart or committee structure
- Strategic plan (optional but recommended)

## Governance

- Board or committee member role descriptions
- Conflict of interest policy
- Code of conduct
- Meeting agendas and minutes
- Annual reports

## Financial Documents

- Annual budget
- Financial policies and procedures
- Bank account information and signing authority
- Expense reimbursement policy
- Financial statements
- Grant agreements (if applicable)
- Donation records and receipts

## Volunteer Management

- Volunteer application form
- Volunteer agreement
- Role descriptions
- Succession plan for each role
- Training records
- Emergency contact forms
- Confidentiality agreement (if volunteers handle sensitive information)
- Volunteer recognition records

## Event Planning

- Event planning checklist
- Event timeline
- Project plan
- Vendor contracts
- Venue agreements
- Equipment inventory
- Event budget
- Site maps
- Run sheets or event schedules
- Post-event evaluation report

## Risk Management

- Risk assessment
- Emergency response plan
- First aid procedures
- Incident/accident report form
- Insurance certificates
- Health and safety policy
- Weather contingency plan
- Child protection or vulnerable persons policy (if applicable)

## Policies

- Privacy policy
- Records retention policy
- Social media policy

- Media and photography consent policy
- Anti-harassment policy
- Accessibility policy
- Diversity, equity, and inclusion policy
- AI safe use policy
- Child protection or vulnerable persons policy (if applicable)

### Communications

- Sponsorship packages
- Sponsorship agreements
- Media release templates
- Marketing plan
- Volunteer contact lists
- Stakeholder contact directory

### Legal and Compliance

- Required licenses and permits
- Insurance policies
- Tax filings (if applicable)
- Copyright or music licenses (if needed)
- Food handling permits (if applicable)

- Event registration form
- Vendor application
- Sponsorship application
- Volunteer sign-in sheet
- Waiver and liability release
- Photo release form
- Feedback survey
- Donation form

## If you're just starting out

At a minimum, most volunteer-run organizations benefit from having:

1. Constitution or bylaws
2. Code of conduct
3. Volunteer agreement
4. Financial policy
5. Risk assessment template
6. Incident report form
7. Event planning checklist
8. Emergency plan
9. Budget template
10. Meeting minutes template
11. Privacy policy
12. Insurance documentation

### Forms and Templates

Having these documents in place helps clarify responsibilities, supports consistent operations, and can make it easier to work with volunteers, sponsors, venues, insurers, and grant providers.

If your organization is incorporated or registered as a nonprofit or charity, there may also be legal requirements for governance, financial reporting, and recordkeeping that apply.

# Front matter: Master Event Planning Checklist

## Why It's Important

This checklist is the full roadmap for an event, from the first planning meeting a year out to the final post-event debrief. It breaks the work into time blocks so nothing important gets left to the last minute, and it turns a large, daunting project into a series of manageable tasks. Treat it as a living plan rather than a fixed list. Assign an owner to every task, check items off as you go, and adjust the timing to match your event and your team.

## How to Use

1. Copy the checklist into your project tool or a shared document.
2. If your event is less than twelve months away, start at the time block that matches your lead time and compress the earlier steps.
3. Assign a task owner to every line. A task with no owner rarely gets done.
4. Review the checklist at each committee meeting and mark progress.
5. Add any tasks specific to your event, such as a parade route, a beer garden, or a children's area.
6. After the event, note what you would change and save the updated version for next year.

## What You Need

- An event date, a purpose, and a rough attendance target.
- A committee with named leads for the main areas: finance, marketing, volunteers, logistics, and sponsorship.
- A shared project tool or document the whole team can see.
- Your budget and event timeline open alongside this checklist, since the three work together.

# Event Ready Master Event Planning Checklist template

*Operational Best Practice: Do not view this as a rigid list, but as a dynamic project management framework. Assign a "Task Owner" to every bullet point in your project management software (Asana, Monday.com, Trello) to ensure accountability.*

> **How to use this checklist.** This is the detailed task list. The Event Timeline template is the calendar summary of the same year, so use them together: plan the month on the timeline, then work the tasks here. If your event is less than twelve months away, start at the time block that matches your lead time and compress the earlier steps. Pair this checklist with the Budget, Event Timeline, Volunteer Database, and Accessibility Checklist templates in this toolkit.

**12 Months Before (Strategic Planning & Foundations)**

- **Planning:** Define event purpose, goals, and KPIs (the few numbers that show the event worked, such as attendance or funds raised). Establish the Event Committee.
- **Budget:** Draft the preliminary high-level budget. Determine ROI metrics (what you expect to get back for what you spend).
- **Venue:** Research and shortlist venues based on capacity, location, and brand alignment.
- **Sponsors:** Create sponsorship tiers and a prospectus (a short pitch document for sponsors). Begin outreach to your largest sponsors.
- **Compliance:** Review local regulations, accessibility requirements (use Canadian and BC standards, and see the Accessibility Checklist in this toolkit), and tax implications.
- **Risk Management:** Draft initial Risk Management Matrix (identifying high-level operational, financial, and reputational risks).
- **Insurance:** Research and secure General Liability and Event Cancellation insurance quotes.

**6 Months Before (Vendor Lock-in & Marketing Launch)**

- **Venue:** Sign the venue contract. Ensure cancellation/clause policies are reviewed by legal.
- **Permits:** Apply for necessary permits (noise, street closure, alcohol, fire safety).
- **Vendors:** Release RFPs for major vendors (written requests for quotes). Secure Audio/Visual (A/V), production, and decor.
- **Catering:** Secure caterer. Plan menus, ensuring options for vegan, gluten-free, and allergen-safe meals.
- **Entertainment:** Book keynote speakers, bands, or specialized entertainment. Sign contracts.

- **Marketing:** Launch event website. Open early-bird registration. Announce via email and social media.
- **Sponsors:** Confirm sponsor booth layouts and custom integrations.
- **Technology:** Select event management platform (registration, ticketing, mobile app).

**3 Months Before (Logistics & Team Building)**

- **Registration:** Close early bird. Launch standard ticket pricing. Track registration pace.
- **Staffing:** Hire event day staff (managers, stage managers, registration leads).
- **Volunteers:** Open volunteer applications. Draft shift schedules and role descriptions.
- **Logistics:** Draft floor plan and booth layouts. Submit to fire marshal if required.
- **Accessibility:** Finalize accessibility plans (ASL interpreters, wheelchair ramps, sensory-quiet rooms, closed captioning for virtual).
- **Sustainability:** Implement green initiatives (e.g., digital tickets, zero-waste catering, carbon offset options).
- **Communications:** Draft all attendee email templates (confirmations, reminders, FAQs).

**1 Month Before (Finalization & Compliance)**

- **Vendors:** Finalize all vendor contracts and logistics. Confirm load-in/load-out schedules.
- **Catering:** Submit final headcount guarantee to caterer.
- **Technology:** Conduct A/V and virtual platform dry runs. Test Wi-Fi bandwidth at the venue.
- **Risk Management:** Finalize contingency plans (weather, medical emergencies, speaker cancellations, power outages).
- **Insurance:** Ensure all vendors have submitted their Certificates of Insurance (COI) naming your organization as additionally insured.
- **Permits:** Verify all permits are approved and printed.
- **Marketing:** Launch final marketing push. Send "Know Before You Go" emails.

**2 Weeks Before (Briefings & Checks)**

- **Staffing/Volunteers:** Host mandatory training sessions and briefings for staff and volunteers.
- **Logistics:** Finalize Run of Show (ROS) document. Distribute to all department heads.
- **Communications:** Send venue maps, parking instructions, and agenda to attendees.
- **Sponsors:** Send final sponsor briefing packet.
- **Technology:** Finalize virtual/hybrid platform settings. Ensure recorded content is backed up.

**1 Week Before (Lockdown & Contingency)**

- **Budget:** Reconcile all vendor invoices. Ensure all final payments are scheduled.

- **Registration:** Close online registration. Prepare on-site check-in systems (print badges, scan devices).
- **Logistics:** Pack and ship event kits, signage, and office supplies to the venue.
- **Risk Management:** Final review of medical and safety protocols with venue security. Identify nearest hospitals and urgent care centers.

**Event Day (Execution)**

- **Logistics:** Conduct venue walk-through. Oversee load-in and vendor setup.
- **Technology:** Perform final A/V and microphone checks 2 hours before doors open.
- **Staffing/Volunteers:** Distribute radios, lanyards, and schedules. Conduct morning huddle.
- **Registration:** Open registration desk. Monitor traffic flow and troubleshoot tech issues.
- **Communications:** Use a centralized Slack/Teams channel or radios for real-time internal communication.
- **Risk Management:** Monitor weather, crowd density, and safety protocols continuously.
- **Sustainability:** Ensure waste sorting stations are monitored and utilized correctly.

**Post-Event (Wrap-up & Analytics)**

- **Logistics:** Oversee load-out. Ensure venue is clean and undamaged to secure deposit returns.
- **Budget:** Reconcile final budget. Pay outstanding invoices.
- **Communications:** Send "Thank You" emails to attendees, sponsors, speakers, and volunteers. Send post-event surveys within 48 hours.
- **Marketing:** Share highlight reels, photos, and key metrics on social media.
- **Planning:** Host an internal post-mortem meeting. Document "Lessons Learned" and update this checklist for future scalability.

# Front matter: Event Timeline

## Why It's Important

The event timeline is the simple calendar companion to the master checklist. Where the checklist lists every task, the timeline shows the year at a glance, month by month, with a lead volunteer named for each stage. It helps a committee see the shape of the work, recruit help early, and spread the effort so no single month becomes a crisis. For a volunteer team, this one-page view is often the easiest way to keep everyone pointed in the same direction.

## How to Use

1. Set your event date, then work backward to fill each row.
2. Name a lead volunteer for each stage. This is who keeps that stage moving, not who does all the work.
3. Post the timeline where the whole committee can see it, in your shared folder or on a wall at meetings.
4. Use the blank template that matches your lead time, either the 12-month or the 6-month version.
5. Update the status column so progress is visible at a glance.
6. Keep planning meetings to sixty to ninety minutes, as the tips suggest.

## What You Need

- A confirmed or target event date.
- A list of your main working areas and a willing lead for each.
- The master checklist nearby, since the timeline summarizes it.
- A regular meeting rhythm, ideally monthly.

# Event Ready Event Timeline template

A simple annual timeline helps volunteer-run organizations spread the workload, recruit volunteers early, and avoid last-minute stress. Here's an example for a single major event held in **Month 12**.

> **How this relates to the Master Checklist.** This timeline is the calendar summary: the year at a glance, with a lead volunteer for each stage. The Master Event Planning Checklist is the detailed task list. Use them together.

| Timeline | Key Activities | Lead Volunteers |
|---|---|---|
| **12 Months Before** | Set event date, establish organizing committee, define goals and budget | Board/Event Chair |
| **10–11 Months Before** | Book venue, develop project plan, identify sponsors and grant opportunities | Venue, Finance, Sponsorship Teams |
| **8–9 Months Before** | Confirm major vendors, recruit committee members, launch sponsorship campaign | Operations, Volunteer Coordinator |
| **6–7 Months Before** | Begin marketing, open vendor/exhibitor registrations (if applicable), recruit volunteers | Marketing, Volunteer Team |
| **4–5 Months Before** | Confirm entertainment/speakers, order supplies, review budget, secure permits and insurance | Program Lead, Logistics |
| **3 Months Before** | Increase marketing efforts, confirm sponsors, schedule volunteers, finalize event layout | Marketing, Volunteer Coordinator |
| **2 Months Before** | Conduct planning meetings, order final materials, confirm vendors, create event schedule | All Team Leads |
| **1 Month Before** | Train volunteers, confirm logistics, prepare signage and registration materials, contingency planning | Operations Team |

| | | |
|---|---|---|
| **Event Week** | Final walkthrough, vendor check-in, volunteer briefing, event setup | Entire Organizing Committee |
| **Event Day** | Execute event, manage volunteers, troubleshoot issues, celebrate success | All Volunteers |
| **1–2 Weeks After** | Thank volunteers and sponsors, pay invoices, collect feedback, debrief meeting | Board & Committee |
| **1 Month After** | Review outcomes, document lessons learned, archive files, begin planning for next year | Organizing Committee |

## Tips for Volunteer Organizations

- Keep monthly planning meetings to **60–90 minutes**.
- Assign one volunteer lead for each major area (Finance, Marketing, Volunteers, Logistics, Sponsorship).
- Use a shared project management tool or spreadsheet to track tasks.
- Document procedures each year so new volunteers can easily take over roles.

## Blank template (12-month runway)

| Timeline | Key Activities | Lead Volunteers | Status (Done / In progress / Not started) |
|---|---|---|---|
| 12 months before | | | |
| 10-11 months before | | | |
| 8-9 months before | | | |
| 6-7 months before | | | |
| 4-5 months before | | | |
| 3 months before | | | |
| 2 months before | | | |
| 1 month before | | | |
| Event Week | | | |
| Event Day | | | |
| 1-2 weeks after | | | |
| 1 month after | | | |

## Blank template (shorter 6-month runway)

For a smaller or faster event, use this compressed version and start at the row that matches your lead time.

| Timeline | Key Activities | Lead Volunteers | Status (Done / In progress / Not started) |
|---|---|---|---|
| **6 months before** | | | |
| **4 months before** | | | |
| **3 months before** | | | |
| **2 months before** | | | |
| **1 month before** | | | |
| **Event Week** | | | |
| **Event Day** | | | |
| **1-2 weeks after** | | | |
| **1 month after** | | | |

# Front matter: Budget

### Why It's Important

A budget is the plan for your money before any of it is spent. It lists what you expect to earn and what you expect to spend, so the committee can approve the plan, watch spending against it, and avoid surprises. Kept up to date, it becomes the single clearest picture of whether your event will break even, raise funds, or run short. It is also the document sponsors and grant providers most often ask to see.

### How to Use

1. Fill in the Income section first: ticket or gate sales, sponsorships, grants, vendor fees, donations, and any raffle or 50/50 revenue.
2. Fill in expected costs in the Expenses section, using the *Est. Cost* column.
3. Keep a contingency line of ten to fifteen percent for surprises.
4. As you sign contracts and collect money, record the actual figures and let the *Variance* columns show where you are off plan.
5. Watch the Summary for your bottom line: Total Income, Total Expenses, and Net.
6. Review the budget at every meeting and reconcile it within days of the event.

### What You Need

- Quotes or estimates for your main costs.
- A realistic income forecast based on past events or comparable ones.
- Your financial policy on hand, since it sets approval limits and cash rules.
- One owner, usually the treasurer, who keeps the budget current.

# Event Ready Budget template

### Budget Template

*Operational Best Practice: This template mirrors standard accounting practices. Record what you expect to earn (income) and what you expect to spend (expenses), then watch the summary to see whether the event breaks even, raises funds, or runs short. Maintain a 10-15% contingency line for unforeseen expenses. Use the "Notes" section to track contract clauses or specific vendor requirements.*

## Income

*List every source of money coming in. For raffles and 50/50 draws, remember these need a gaming event licence in BC (see the Financial Policy template).*

| Category | Line Item | Source | Est. Income | Actual Income | Variance | Received? | Notes |
|---|---|---|---|---|---|---|---|
| **Ticket / Gate** | | | | | | | |
| | | | | | | | |
| **Sponsorship** | | | | | | | |
| | | | | | | | |
| **Grants** | | | | | | | |
| **Vendor Fees** | | | | | | | |
| **Donations** | | | | | | | |
| **Raffle / 50-50** | | | | | | | |
| **Other Income** | | | | | | | |
| **TOTAL INCOME** | | | | | | | |

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# Expenses

| Category | Line Item | Vendor | Est. Cost | Deposit | Actual Cost | Variance | Payment Status | Due Date | Notes |
|---|---|---|---|---|---|---|---|---|---|
| Venue & Rentals | | | | | | | | | |
| | | | | | | | | | |
| Food & Beverage | | | | | | | | | |
| | | | | | | | | | |
| A/V & Tech | | | | | | | | | |
| | | | | | | | | | |
| Marketing & PR | | | | | | | | | |
| | | | | | | | | | |
| Staffing & Talent | | | | | | | | | |
| | | | | | | | | | |
| Logistics & Admin | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| Sustainability | | | | | | | | | |
| Contingency | | | | | | | | | |
| TOTAL EXPENSES | | | | | | | | | |

## In-Kind Contributions

*Donated goods and services are not cash, but recording them helps with grant reporting and thank-you lists. Note the item, who provided it, and an estimated value.*

| Item / Service | Provided By | Estimated Value | Notes |
|---|---|---|---|
| | | | |
| | | | |
| | | | |

## Summary

| Line | Amount |
|---|---|
| **Total Income** | |
| **Total Expenses** | |
| **Net (surplus or shortfall)** | |
| Estimated attendance | |
| Cost per attendee (Total Expenses ÷ attendance, optional) | |

# Front matter: Financial Policy

## Why It's Important

This policy sets the rules for handling money so that funds are managed with care and volunteers are protected. It covers how cash is counted, how expenses are approved and reimbursed, how vendors are paid, and how the books are reviewed. Clear rules do two jobs at once: they reduce the chance of error or loss, and they shield honest volunteers from any suggestion of wrongdoing. For an organization that handles gate cash, donations, or ticket sales, this policy is a basic safeguard.

## How to Use

1. Fill in the blanks, especially the approval dollar limits, to match your organization's size.
2. Have the board or committee formally adopt the policy so it carries weight.
3. Train every cash handler on the two-person rule before your first event.
4. Print the cash log and reconciliation forms and keep them in your cash box or command station.
5. Keep receipts and reimbursement requests in one shared folder, using photos uploaded on the day.
6. Review the policy each year and after any incident.

## What You Need

- An adopted set of approval limits agreed by the board.
- Named signing authorities, usually the chair and treasurer.
- A bank or processor account in the organization's name, never a personal account.
- Lockable cash boxes and a secure location for counting and storage.
- Two trained volunteers available whenever cash is handled.

# Event ready Financial policy template

## Volunteer Event Organization:Financial Policy

### 1. Purpose & Scope

This policy ensures that all funds raised, donated, or spent by [Organization Name] are handled with transparency, accountability, and integrity. This applies to all volunteers, event organizers, and committee members.

### 2. General Principles

- Transparency: All financial records are open to review by any active committee member upon request.
- Non-Profit Intent: All funds raised must strictly support the organization's mission and events. No volunteer shall financially benefit from the organization's funds.
- Separation of Duties: To prevent errors or misuse, the person who approves an expense should ideally not be the person writing the check or making the payment.

### 3. Income & Cash Handling

Because events often involve physical cash or digital ticket sales, the following rules apply:

- The Two-Person Rule: At least two volunteers must count any physical cash collected at an event. Both must sign a cash-verification slip confirming the total.
- Timely Deposits: All cash and checks must be deposited into the organization's bank account within 5 business days of the event.
- Digital Sales: All online ticket sales or donations must go directly into the official organization bank/processor account (e.g., Stripe, PayPal), never a volunteer's personal account.

### 4. Expenses & Reimbursements

Volunteers should not be out-of-pocket for approved event expenses, but strict tracking is required.

- Pre-Approval Limits: * Expenses under $____ can be approved by the Event Lead.
- Expenses over $____ require written or email approval from the Treasurer or Board.
- Reimbursement Process: To get paid back, volunteers must submit a Reimbursement Request along with an itemized receipt within 30 days of the purchase.

- No Receipt, No Reimbursement: Lost receipts will not be reimbursed unless explicitly approved by the Treasurer under exceptional circumstances.

## 5. Financial Reporting & Oversight

- The Budget: The committee must approve an annual budget (or an individual event budget) before any spending begins.
- Monthly Reviews: The Treasurer will provide a simple financial update (Income vs. Expenses) at every monthly meeting.
- Bank Access: At least two core leaders (e.g., President and Treasurer) must have viewing access to the bank account to ensure mutual oversight.

## 6. Vendor & Performer Management

Events may rely heavily on external partners. To keep things orderly, we use the following guidelines:

- Written Agreements: Every food truck, craft vendor, and performer must sign a standard agreement detailing fees, deposit structures, and cancellation policies before the event date.
- Vendor Fees: All vendor booth fees must be paid in full __ days prior to the festival. Spaces will not be held without payment.
- Tax Compliance: The Treasurer will collect required tax forms from any performer or contractor paid over the legal reporting threshold.

## 7. Event Day Cash & Gate Controls

High-traffic events need tight security around money.

- Secure Cash Boxes: All cash boxes at the gate, merchandise booths, or raffle tables must remain locked, and keys must be kept only by designated Volunteers.
- Mid-Day Skims: When a cash box exceeds $500, the Treasurer/designated volunteer and one other volunteer will conduct a "skim" to count the excess cash, document it, and move it to a secure, hidden safe location.
- Float Management: The Treasurer will prepare a standardized "float" (starting cash/change) for each booth. This float must be counted and signed for by the booth lead before the event opens.

## 8. Upfront Deposits & Contracts

Events requiring significant upfront spending before any ticket or vendor revenue comes in.

- Signing Authority: Only the Chair/President and the Treasurer have the authority to sign binding contracts with venues, rental companies, or main-stage talent.
- Deposit Budgeting: The committee must maintain a "reserve fund" equal to at least 25% of the previous year's operating budget to cover upfront deposits for the following year's event.

### 9. Post-Event Reconciliation

- Final Count: Within 48 hours of the event closing, the Treasurer will compile a final financial report comparing actual revenue against the projected budget.
- Payouts: All approved volunteer reimbursements and outstanding vendor invoices will be paid out within 14 business days after the event concludes.

Tip for Implementation: Keep a shared Google Drive folder where volunteers can upload photos of receipts on the go. This prevents lost paperwork and makes the Treasurer's life much easier!

## Cash Handling

### The Two-Person Rule

Policy Statement:

All cash counting, verification, and transport MUST be conducted by a minimum of two authorized individuals at all times. No exceptions.

Why This Matters:

- Protects volunteers from false accusations
- Reduces opportunity for theft or loss
- Provides witness verification for accurate counts
- Creates accountability and audit trail

Two-Person Rule Applications:

| **Activity** | **Two-Person Requirement** |
|---|---|
| Opening cash drawer/box | Both persons verify starting amount and sign log |
| Mid-event cash pulls | Both persons count, record, and sign for amount removed |
| End-of-shift counting | Both persons count independently, then verify together |

| | |
|---|---|
| Cash transport | Two persons escort cash to secure location |
| Bank deposits | Two persons verify deposit amount; one deposits while other witnesses |
| Safe access | Two persons present whenever safe is opened |

## Cash Counting Procedures

Start of Shift:

1. Two authorized volunteers retrieve cash box/drawer from secure location
2. Both volunteers independently count starting cash ("bank")
3. Compare counts, which must match exactly before proceeding
4. Both volunteers sign Cash Log with:

- Date and time
- Starting amount
- Printed names and signatures

1. Cash box remains in designated secure area (not left unattended)

During Shift:

- Keep cash box closed and secured when not actively making transactions
- Never leave cash unattended. If you must step away, another authorized handler takes over
- Place large bills ($50, $100) under the cash tray immediately
- If cash drawer exceeds $200, conduct a "cash pull" to reduce theft risk

Cash Pull Procedure:

1. Two authorized volunteers count excess cash
2. Leave standard bank amount in drawer (typically $100-150)
3. Place pulled cash in envelope, seal it
4. Both volunteers sign across envelope seal with amount and time
5. Deliver immediately to Event Lead or secure location
6. Record pull on Cash Log

End of Shift:

1. Stop accepting cash transactions at designated closing time
2. Two authorized volunteers count all cash independently
3. Compare counts. If a discrepancy exists, recount together
4. Complete Cash Reconciliation Form:

- Starting bank amount
- Total cash collected
- Any cash pulls (with envelope numbers)
- Expected total vs. actual total
- Variance (if any) with explanation

1. Both volunteers sign reconciliation form
2. Place cash and completed paperwork in deposit bag
3. Two volunteers transport to Event Lead or secure location

# Front matter: Volunteer Database

## Why It's Important

Volunteers are the engine of a community event, and a simple database keeps that engine organized. It holds contact details, skills, availability, and hours in one secure place, so you can match the right people to the right roles, reach the right groups quickly, and recognize the contributions people make. Handled well, it also protects volunteers' privacy and makes it easy to welcome them back year after year. Collect only what you need, keep it secure, and be clear about how it is used.

## How to Use

1. Decide which fields you will collect. Start with the essentials and skip anything you will not use.
2. Tell every volunteer what you collect, why, who can see it, and how long you keep it, then record their consent.
3. Store the database in password-protected software or secure cloud storage, not on personal devices.
4. Limit access to the few organizers who need it.
5. Use the segments, such as skills or availability, to send targeted messages instead of emailing everyone.
6. Review records once a year, archive inactive volunteers, and honour any request to update or delete information.

## What You Need

- A clear list of the information you actually need for the role.
- A consent statement and a way to record consent.
- Secure, access-controlled storage with regular backups.
- A named owner responsible for keeping records accurate and private.
- A privacy policy available to volunteers on request.

# Event Ready Volunteer Database template

## Collect only the information you need

Gather information that is directly relevant to volunteer management, such as:

- Full name
- Preferred name (optional)
- Contact information (email, phone)
- Emergency contact
- Availability
- Skills, certifications, and experience
- Volunteer interests
- Accessibility or accommodation needs (optional)
- Languages spoken
- Consent to receive communications

Avoid collecting unnecessary sensitive information unless it is required for the role.

## Obtain clear consent

Tell volunteers:

- What information you're collecting
- Why you need it
- Who will have access
- How long you'll keep it
- How they can update or request deletion of their information

Document their consent for communications and data storage.

## Keep data secure

- Use password-protected volunteer management software or secure cloud storage.
- Limit access to staff who need the information.
- Enable multi-factor authentication where possible.
- Avoid storing volunteer lists on personal devices.
- Back up the database regularly.

## Keep records accurate

Review and update volunteer profiles regularly:

- Contact information
- Availability
- Training completed
- Certifications
- Emergency contacts
- Hours volunteered

Encourage volunteers to update their own information annually.

### Track volunteer activity

Useful information includes:

- Events participated in
- Volunteer hours
- Roles performed
- Training completed
- Awards or recognition received
- Feedback from supervisors
- Preferences for future assignments

This helps match volunteers with appropriate opportunities.

### Segment your database

Create categories to make communication easier, such as:

- Event volunteers
- Committee members
- Team leaders
- Specialized skills (first aid, photography, registration)
- Geographic area
- Availability (weekday, evening, weekend)

This allows targeted emails instead of sending every message to everyone.

### Respect privacy

- Don't share volunteer contact information without permission.
- Use blind copy (BCC) or email marketing software for group emails.
- Remove access for former staff or organizers promptly.
- Have a privacy policy available.

### Establish retention policies

Decide how long you'll keep inactive volunteer records. For example:

- Archive inactive volunteers after 2 years.
- Delete records after a defined period unless there's a legal or organizational reason to retain them.
- Allow volunteers to request removal of their information.

### Use the database to strengthen engagement

Track:

- Birthday or anniversary recognition (if volunteers opt in)
- Milestone hours
- Training opportunities
- Volunteer interests
- Recognition awards

This supports long-term volunteer retention.

### Comply with applicable privacy laws

Follow the privacy legislation that applies to your organization. For example:

- In Canada, organizations need to comply with federal or provincial privacy laws depending on where they operate and the nature of the organization.
- Ensure your practices align with applicable consent, security, and data retention requirements.

# Volunteer Database

### We have created a spreadsheet

Link here: [insert link here

# Event Assignments

| Event Name | Event Date | Volunteer ID | Volunteer Name | Assigned Role | Shift | Supervisor | Check-In | Check-Out | Hours |
|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | | | |
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# Volunteer Hours Tracking

| Volunteer ID | Volunteer Name | Event | Date | Start Time | End Time | Total Hours | Approved By |
|---|---|---|---|---|---|---|---|
| | | | | | | | |
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## Skills & Certificates

| Volunteer ID | Volunteer Name | First Aid | Food Safe | Driver's License | Criminal Record check | Heavy Lifting | Customer Service | Languages | Other Skills |
|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | | | |
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# Front matter: Volunteer Resource Guide (Safety, Waivers, and Code of Conduct)

*This is the core policy document of the toolkit. It has three parts, each with its own front matter below, followed by the full document.*

## Part A: Safety and Risk Management

### Why It's Important

This section prepares volunteers to respond calmly when something goes wrong, from a medical emergency or a fire to severe weather, a security concern, or a lost child. It sets out clear steps for each situation and explains when and how to document what happened. Volunteers do not need to be experts. They need to know the plan, know their role, and know who to call. Reviewing these procedures before an event is one of the simplest ways to keep everyone safe.

### How to Use

1. Fill in the event-specific details, including the quick reference page, assembly points, and local hospital and urgent care locations.
2. Assign roles in advance: first aid, weather monitoring, security, and a lost-child lead.
3. Walk volunteers through the emergency procedures at the pre-event briefing.
4. Set up a first aid station and a "go-bag" with incident forms, gloves, and a high-visibility vest.
5. Keep blank incident report forms and pens at the command station.
6. Complete an incident report for any injury, near-miss, or concern, and store it securely.

### What You Need

- Assembly points and emergency contacts confirmed with your venue.
- A stocked first aid kit and, where possible, trained first aid volunteers.
- A way to reach all stations quickly, such as radios or a group text.
- Printed incident report forms at the event.
- A briefing scheduled before doors open.

# Part B: Waivers

## Why It's Important

Waivers set out the risks of taking part and record that volunteers and participants understand and accept them. They are a standard part of running events and help protect the organization if someone is hurt. The templates here give you a starting structure for both volunteers and participants, including photo and video consent and provisions for minors. Because liability law varies, these templates are drafts to be reviewed by qualified legal counsel and your insurer before use.

## How to Use

1. Have legal counsel and your insurer review and adjust the templates for your event and province.
2. Fill in the event name, dates, and the specific risks that apply to your activity.
3. Collect a signed waiver from every volunteer and participant before they take part.
4. Include the parent or guardian section for anyone under eighteen.
5. Record the photo and video consent choice and respect it on the day.
6. Store signed waivers securely for the retention period your advisor recommends, longer where minors are involved.

## What You Need

- Legal and insurance review before first use.
- A clear list of the risks specific to your event.
- A reliable way to collect and store signatures, whether paper or a digital waiver tool.
- A process to flag anyone who declined photo consent to your photographers.
- Secure, long-term storage for signed forms.

# Part C: Code of Conduct

## Why It's Important

The code of conduct sets the tone for how volunteers treat each other, participants, and the public. It states plainly what is expected, what is not allowed, and what happens if the line is crossed. A shared standard makes for a welcoming, respectful event and gives coordinators a fair, consistent basis for handling problems. Having every volunteer read and sign it removes any doubt about the rules before the event begins.

## How to Use

1. Adapt the template with your organization's name and any event-specific expectations.
2. Share it with volunteers when they sign up, before their first shift.
3. Have each volunteer sign the acknowledgement, on paper or digitally.
4. Point new volunteers to the reporting contacts so they know where to raise concerns.
5. Apply the consequences consistently if the code is broken.
6. Review the code each year to keep it current.

## What You Need

- A completed template with your details and reporting contacts.
- A signature process tied into volunteer sign-up.
- Coordinators briefed on how to respond to reports.
- A confidential way for volunteers to raise concerns.
- Signed acknowledgements stored with your volunteer records.

# Event Ready VOLUNTEER RESOURCE GUIDE

## *A Comprehensive Toolkit for Volunteer-Run Event Organizations*

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**Document Version:** 1.0

**Last Updated:** [Insert Date]

**Organization:** [Insert Organization Name]

---

# EVENT QUICK REFERENCE

*Fill this in for each event and keep it visible at the command station and first aid station.*

| Field | Detail |
|---|---|
| Event name | |
| Event date | |
| Event Lead (name / phone) | |
| First Aid Lead (name / phone) | |
| Emergency services | 911 |
| Nearest hospital (name / address) | |
| Nearest urgent care (name / address) | |
| Primary assembly point | |
| Secondary assembly point | |
| Safe Space contact (name / phone) | |

# TABLE OF CONTENTS


1. Safety & Risk Management Policies
2. Participant & Volunteer Waivers
3. Volunteer Code of Conduct


# SECTION 1: SAFETY & RISK MANAGEMENT POLICIES

## 1.1 Emergency Response Protocols

### Medical Emergencies

**Immediate Response Steps:**

- [ ] Stay calm and assess the situation from a safe distance
- [ ] Call for designated First Aid volunteer or dial 911 for life-threatening emergencies
- [ ] Do NOT move an injured person unless they are in immediate danger
- [ ] Clear the area of bystanders to give responders space
- [ ] Send a volunteer to meet emergency services at the entrance
- [ ] Notify the Volunteer Coordinator and Event Lead immediately

**First Aid Station Requirements:**

- Clearly marked location on all site maps
- Stocked first aid kit (inventory checked before each event)
- AED device (if available) with trained operators identified
- Incident report forms readily available
- Emergency contact list posted visibly

**Documentation Required:**

- Complete Incident Report Form within 1 hour of incident
- Photograph scene (if appropriate and with consent)
- Collect witness statements
- Retain all documentation for minimum of 7 years

**PRO-TIP:** Create a "Medical Emergency Go-Bag" that includes: incident forms, pens, disposable gloves, emergency contact list, and a high-visibility vest for the responder.

## Fire & Evacuation Procedures

**Upon Discovering Fire or Receiving Evacuation Order:**

1. **ALERT:** Activate nearest fire alarm or notify Event Lead immediately
2. **EVACUATE:** Guide all participants to nearest emergency exit
3. **ACCOUNT:** Proceed to designated assembly point; team leads conduct headcount
4. **REPORT:** Provide information to emergency services upon arrival

**Volunteer Responsibilities During Evacuation:**

- Direct participants calmly but firmly toward exits
- Assist individuals with mobility limitations (pre-identified buddies recommended)
- Do NOT use elevators
- Do NOT re-enter building until "all clear" is given by authorities
- Registration team brings sign-in sheets to assembly point for accountability

**Assembly Point Locations:**

| Zone | Primary Assembly Point | Secondary Assembly Point |
|---|---|---|
| Main Venue | [Location] | [Location] |
| Outdoor Area | [Location] | [Location] |
| Parking Area | [Location] | [Location] |

---

## Severe Weather Protocols

**Monitoring Requirements:**

- Designate one volunteer to monitor weather alerts throughout event
- Establish communication chain for weather updates
- Identify shelter-in-place locations for outdoor events

**Thunder/Lightning Protocol:**

- If thunder is heard or lightning seen: immediate suspension of outdoor activities
- Move all participants and volunteers indoors or to vehicles

- Wait minimum 30 minutes after last thunder/lightning before resuming

**Tornado/Severe Storm Warning:**

- Move to interior rooms away from windows
- Avoid large open rooms (gymnasiums, auditoriums)
- Account for all volunteers and participants

### Security Incidents

**Active Threat Response (Run-Hide-Fight):**

1. **RUN:** If safe escape route exists, evacuate immediately
2. **HIDE:** If escape not possible, find secure hiding location, silence phones
3. **FIGHT:** As absolute last resort, take action to incapacitate threat

**Suspicious Person/Activity:**

- Do NOT confront directly
- Note description: height, weight, clothing, distinguishing features
- Report immediately to Event Lead or Security volunteer
- Document observations as soon as safely possible

**Lost Child Protocol:**

1. Obtain detailed description from parent/guardian
2. Notify all volunteer stations via radio/text chain
3. Secure all exits (no one leaves without verification)
4. If not found within 10 minutes, contact local law enforcement
5. Keep parent/guardian with a designated volunteer at command station
6. Before releasing the child, confirm the collecting adult against a detail only the parent or guardian would know

## 1.2 Harassment Prevention & Response Policy

### Policy Statement

[Organization Name] is committed to providing a safe, welcoming, and inclusive environment for all volunteers, participants, and staff. Harassment of any kind is strictly prohibited and will not be tolerated.

### Definition of Harassment

Harassment includes, but is not limited to:

- **Verbal:** Slurs, epithets, derogatory comments, unwelcome jokes, or threats
- **Physical:** Unwanted touching, blocking movement, physical intimidation
- **Visual:** Offensive images, gestures, or written materials
- **Sexual:** Unwelcome sexual advances, requests for favors, inappropriate comments about appearance
- **Cyber:** Harassing messages via text, social media, or email related to organizational activities

## Reporting Procedures

**Who Can Report:**

Anyone who experiences or witnesses harassment may file a report.

**How to Report:**

1. **Immediate/In-Person:** Notify any Volunteer Coordinator, Event Lead, or designated Safe Space volunteer
2. **Written Report:** Complete Incident Report Form (available at registration and command station)
3. **Post-Event:** Email [designated email] or call [designated phone number]

**What Happens Next:**

- All reports are taken seriously and handled confidentially
- Reporter will be contacted within 24-48 hours to acknowledge receipt
- Investigation will be conducted promptly
- Appropriate action will be taken, which may include removal from event, termination of volunteer status, or reporting to authorities

## Non-Retaliation Policy

Retaliation against anyone who reports harassment or participates in an investigation is strictly prohibited and will result in immediate dismissal from the volunteer program.

> **PRO-TIP:** Identify 2-3 volunteers as designated "Safe Space" contacts, identifiable by a specific badge or lanyard color. Train them specifically in trauma-informed response.

# 1.3 Incident Reporting Procedures

## When to Complete an Incident Report

**ALWAYS document:**

- Any injury (no matter how minor)
- Property damage
- Theft or loss of items
- Harassment or code of conduct violations
- Near-misses that could have resulted in injury
- Any interaction with emergency services
- Complaints from participants or volunteers
- Unusual or concerning behavior

## Incident Report Form Template

**INCIDENT REPORT FORM**

**Report Number:** _____ **Date of Report:** _____

**INCIDENT DETAILS**

| Field | Information |
|---|---|
| Date of Incident | |
| Time of Incident | |
| Exact Location | |
| Event Name | |

**PERSONS INVOLVED**

*Person 1:*

- Name: _____
- Role (Volunteer/Participant/Staff/Other): _____

- Contact Information: _____

*Person 2 (if applicable):*

- Name: _____
- Role: _____
- Contact Information: _____

**INCIDENT DESCRIPTION**

*Describe exactly what happened in chronological order. Include only facts, not opinions or assumptions.*

_____

_____

_____

_____

**WITNESSES**

| Name | Contact Info | Statement Attached? |
|---|---|---|
| | | ☐ Yes ☐ No |
| | | ☐ Yes ☐ No |
| | | ☐ Yes ☐ No |

**IMMEDIATE ACTIONS TAKEN**

- [ ] First aid administered
- [ ] Emergency services called (Agency: _____ Report #: _____)
- [ ] Area secured
- [ ] Photos taken
- [ ] Person(s) removed from event
- [ ] Other: _____

**FOLLOW-UP REQUIRED**

- [ ] Insurance notification needed
- [ ] Legal consultation recommended

- [ ] Additional investigation required
- [ ] Policy review recommended
- [ ] No further action needed

**REPORT COMPLETED BY**

Name: _____ Role: _____

Signature: _____ Date: _____

**SUPERVISOR REVIEW**

Reviewed by: _____ Date: _____

Notes: _____

## Incident Report Routing

| Incident Type | Primary Recipient | Secondary Recipient | Timeline |
|---|---|---|---|
| Minor injury (no medical treatment needed) | Event Lead | Volunteer Coordinator | Within 24 hours |
| Injury requiring medical treatment | Event Lead + Board Contact | Insurance carrier | Immediately |
| Harassment/Code of Conduct | Volunteer Coordinator | Board Contact | Within 4 hours |
| Property damage | Event Lead | Venue contact | Within 24 hours |
| Theft | Event Lead + Police | Board Contact | Immediately |
| Near-miss | Event Lead | Safety Committee | Within 48 hours |

**PRO-TIP:** Keep a "Hot File" at your command station with blank incident forms, pens, and a simple one-page guide on how to complete the form. Stress to volunteers: "When in doubt, document it."

**Privacy note:** A completed incident report holds personal information. Store reports securely, limit access to the Event Lead and board contact, and keep them only as long as needed. In British Columbia this falls under the Personal Information Protection Act (PIPA).

# SECTION 2: PARTICIPANT & VOLUNTEER WAIVERS

## IMPORTANT LEGAL DISCLAIMER

**The following waiver templates are provided as starting points only. Laws regarding liability waivers vary significantly by jurisdiction and activity type. These templates MUST be reviewed and customized by qualified legal counsel before use. EventReady Partners or Hello Agency Inc assumes no responsibility for the legal sufficiency of these documents.**

## 2.1 Volunteer Liability Waiver & Release Template

**[ORGANIZATION NAME]**

**VOLUNTEER LIABILITY WAIVER, RELEASE, AND ASSUMPTION OF RISK**

**Event/Program Name: _____**

**Event Date(s): _____**

**Event Location: _____**

**PLEASE READ CAREFULLY BEFORE SIGNING**

In consideration of being permitted to participate as a volunteer for [Organization Name] ("Organization"), I agree to the following:

**1. ASSUMPTION OF RISK**

I understand that volunteering for [Event Name] involves certain inherent risks, including but not limited to: physical exertion, lifting and carrying objects, exposure to weather conditions, proximity to crowds, potential exposure to communicable diseases, and risks associated with [specific activity risks]. I voluntarily assume all such risks, both known and unknown, even if arising from the negligence of the Organization or others, and assume full responsibility for my participation.

## 2. WAIVER AND RELEASE OF LIABILITY

I, for myself and on behalf of my heirs, assigns, personal representatives, and next of kin, hereby release, waive, discharge, and covenant not to sue [Organization Name], its officers, directors, employees, volunteers, agents, and sponsors ("Releasees") from any and all liability, claims, demands, actions, or causes of action whatsoever arising out of or related to any loss, damage, or injury, including death, that may be sustained by me while participating in volunteer activities, or while on the premises where the activities are being conducted.

## 3. INDEMNIFICATION AND HOLD HARMLESS

I agree to indemnify, defend, and hold harmless the Releasees from any loss, liability, damage, or costs, including court costs and attorney fees, that may arise from my participation in volunteer activities, whether caused by the negligence of Releasees or otherwise.

## 4. MEDICAL TREATMENT AUTHORIZATION

I authorize Organization representatives to seek emergency medical treatment on my behalf if I am unable to do so myself. I understand that I am responsible for any costs associated with such medical treatment.

## 5. PHOTO/VIDEO RELEASE

☐ **I GRANT** permission to [Organization Name] to use photographs, video recordings, and/or audio recordings of me taken during volunteer activities for promotional, educational, and fundraising purposes, including but not limited to: websites, social media, print materials, and presentations. I waive any right to inspect or approve the finished product or the copy that may be used.

☐ **I DO NOT GRANT** permission to use my image. I will notify the Volunteer Coordinator and avoid areas where photography is taking place.

## 6. ACKNOWLEDGMENTS

By signing below, I acknowledge that:

- I have read this document in its entirety and understand its contents
- I am at least 18 years of age and legally competent to sign this agreement
- I am signing this agreement voluntarily and without inducement
- I have had the opportunity to ask questions about this agreement
- I understand that this waiver is intended to be as broad and inclusive as permitted by law
- I agree to abide by the Volunteer Code of Conduct

## VOLUNTEER SIGNATURE

Printed Name: _____

Signature: _____ Date: _____

Email: _____ Phone: _____

Emergency Contact Name: _____ Phone: _____

---

**FOR VOLUNTEERS UNDER 18 YEARS OF AGE**

**PARENT/GUARDIAN CONSENT**

I am the parent or legal guardian of the minor named above. I have read this agreement and understand its terms. I consent to my child's participation in volunteer activities and agree to the terms of this waiver on behalf of my child.

Parent/Guardian Printed Name: _____

Relationship to Minor: _____

Signature: _____ Date: _____

## 2.2 Participant/Attendee Waiver Template

**[ORGANIZATION NAME]**

**PARTICIPANT LIABILITY WAIVER AND RELEASE**

**Event Name:** _____

**Event Date(s):** _____

I, the undersigned, wish to participate in [Event Name] organized by [Organization Name].

**ACKNOWLEDGMENT OF RISKS**

I acknowledge that participation in this event involves inherent risks including, but not limited to: [list specific risks relevant to your event]. I understand these risks and voluntarily choose to participate.

**RELEASE AND WAIVER**

In consideration of being allowed to participate, I release and forever discharge [Organization Name], its officers, directors, employees, volunteers, agents, sponsors, and venue owners from any and all claims, damages, or causes of action arising from my participation in this event.

**MEDICAL ACKNOWLEDGMENT**

I certify that I am physically able to participate in this event. I authorize emergency medical treatment if necessary and accept financial responsibility for any such treatment.

**PHOTO/VIDEO CONSENT**

☐ I consent to being photographed/recorded and grant permission for such images to be used for promotional purposes.

☐ I do not consent to being photographed/recorded.

**AGREEMENT**

I have read and understood this waiver. I am at least 18 years old (or have parent/guardian consent below).

Signature: _____ Date: _____

Printed Name: _____

# SECTION 3: VOLUNTEER CODE OF CONDUCT

**Volunteer Code of Conduct Template**

## [ORGANIZATION NAME] VOLUNTEER CODE OF CONDUCT

### Purpose

This Volunteer Code of Conduct outlines the standards of behavior expected of all volunteers. Its purpose is to help create a safe, welcoming, respectful, and positive environment for attendees, volunteers, staff, partners, and the broader community.

## Volunteer Expectations

As a volunteer, I agree to:

- Treat everyone with respect, dignity, fairness, and courtesy.
- Welcome people regardless of their background, identity, or beliefs.
- Follow all instructions provided by event organizers and designated supervisors.
- Perform assigned duties responsibly and to the best of my ability.
- Arrive on time and notify my supervisor as soon as possible if I cannot attend or will be late.
- Wear any required volunteer identification, clothing, or safety equipment.
- Help maintain a clean, safe, and organized event environment.
- Protect confidential or sensitive information obtained through volunteering.
- Represent the organization in a professional and positive manner.
- Immediately report safety concerns, accidents, injuries, or inappropriate behaviour.

## Prohibited Conduct

Volunteers must not:

- Engage in harassment, discrimination, bullying, intimidation, or abusive behaviour.
- Use offensive, threatening, or inappropriate language or gestures.
- Attend volunteer duties while under the influence of alcohol or illegal drugs.
- Smoke, vape, or consume alcohol in prohibited areas or while performing assigned duties, unless specifically authorized.
- Engage in violence, theft, vandalism, or other illegal activity.
- Misuse event property, equipment, or organizational resources.
- Share confidential information without authorization.
- Accept gifts, payments, or personal benefits in exchange for volunteer services unless approved by the organization.
- Post confidential information, private photos, or sensitive event details on social media without permission.

## Health and Safety

Volunteers agree to:

- Follow all health, safety, and emergency procedures.
- Use equipment only if trained or authorized.
- Report hazards immediately.
- Stop any activity that appears unsafe and notify an event supervisor.
- Cooperate during emergency situations and follow official directions.

## Respectful Workplace and Inclusion

The organization is committed to providing an environment free from:

- Harassment
- Discrimination
- Bullying
- Retaliation
- Violence

All volunteers are expected to contribute to an inclusive environment where everyone feels respected and welcome.

## Conflict of Interest

Volunteers should disclose any actual, potential, or perceived conflicts of interest that could affect their volunteer responsibilities.

## Confidentiality

Volunteers may become aware of private or confidential information relating to participants, donors, staff, or the organization. Such information must not be disclosed except where authorized or required by law.

## Social Media

Volunteers should:

- Be respectful when discussing the organization online.
- Avoid speaking on behalf of the organization unless authorized.
- Respect the privacy of attendees, volunteers, and staff.
- Obtain permission before sharing identifiable photos where required.

## Reporting Concerns

If a volunteer experiences or witnesses misconduct, they should report it promptly to:

**Supervisor/Coordinator:** _____

**Phone/Email:** _____

Reports will be handled as confidentially as reasonably possible and reviewed in accordance with organizational policies.

## Consequences of Violations

Failure to follow this Code of Conduct may result in:

- Coaching or additional guidance
- Reassignment of volunteer duties
- Removal from the event
- Suspension or termination of volunteer participation
- Notification of law enforcement where appropriate

## Acknowledgement

I acknowledge that I have read, understood, and agree to comply with this Volunteer Code of Conduct. I understand that failure to comply may affect my ability to volunteer.

**Volunteer Name:** _____

**Signature:** _____

**Date:** _____

**Organization Representative:** _____

**Signature:** _____

**Date:** _____rohibited Behaviors

**The following behaviors will not be tolerated:**

- Harassment, discrimination, or bullying of any kind
- Possession or use of alcohol, illegal drugs, or weapons on site
- Reporting to a shift under the influence

# Front matter: Asset Management

## Why It's Important

Community events run on gear: tents, tables, radios, first aid kits, cash boxes, signage, and more. An asset register keeps track of what your organization owns, where it is stored, what condition it is in, and who has it during an event. It reduces lost and forgotten equipment, makes setup and teardown smoother, and gives you a clear record for insurance. For groups that share or store equipment across a year, it also settles the recurring question of who borrowed what.

## How to Use

1. Start with the Core Register and give each item a unique Asset ID, especially where you own several of the same thing.
2. Record the essentials first: category, quantity, condition, and storage location. Add the Full Register detail over time.
3. Use the Sign-Out Log to record who takes an item, when, and when it comes back.
4. Note the condition on return and flag anything that needs repair or replacement.
5. Add a Photo Link for higher-value items to document condition for insurance.
6. Check the register before each event so you know what you have and what you need to borrow or buy.

## What You Need

- A walk-through of your storage space to list what you actually own.
- A simple ID or label system for higher-value items.
- One owner who keeps the register current.
- A sign-out process volunteers understand and use.
- Your insurance details, so the register supports a claim if needed.

# Event ready Asset Management template

*Start with the Core Register below. It holds the fields most groups actually use. The Full Register adds optional detail for purchase, warranty, maintenance, and insurance. Use only the columns you need, and give every item a unique Asset ID so you can track it, especially when you own several of the same thing. Add a Photo Link (a photo stored in your shared drive) to document condition and support insurance claims.*

## Full Register (optional additional fields)

### Link to full register template here: [link]

## Core Register (minimum viable set)

| Asset ID | Asset Name | Category | Quantity | Condition | Storage Location | Status | Photo Link | Notes |
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## Sign-Out Log (chain of custody)

*One row per check-out. This keeps the full history of who had an item and when, which the register alone does not. Match each entry to an Asset ID above.*

| Asset ID | Asset Name | Checked Out To | Event | Check-Out Date | Expected Return | Returned Date | Condition on Return | Signed Out By | Signed In By |
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## Equipment Inventory Management

**What Requires Sign-Out:**

All organization-owned equipment valued over $50 OR critical to operations, including but not limited to:

| Category | Examples |
|---|---|
| Technology | Radios, tablets, laptops, projectors, speakers, microphones |
| Tools | Power tools, hand tools, dollies, ladders |
| Safety Equipment | First aid kits, AED, fire extinguishers (for transport) |
| Event Supplies | Tents, tables, chairs (bulk quantities), signage |
| Vehicles | Organization vehicles, golf carts, trailers |
| Financial | Cash boxes, credit card readers, safes |

# Front matter: Marketing Timeline

## Why It's Important

Good events still need people to know about them. This marketing timeline breaks promotion into phases, from the first save-the-date to the post-event thank-you, so a small team can build awareness steadily instead of scrambling at the end. It covers social media, email, partnerships, and the event website, with a master checklist you can print. Use the parts that fit your event and your capacity. A local community event does not need every tactic here, and a short, consistent effort often beats an ambitious plan no one has time to run.

## How to Use

1. Fill in the event details at the top: name, date, registration link, hashtag, and marketing lead.
2. If your event is small or less than three months out, use the Lite Plan near the top instead of the full phased plan.
3. Choose the channels you can actually keep up, including local ones like community boards, local radio, the newspaper, posters in shops, and community Facebook groups.
4. Assign an owner and a due date to each task you keep.
5. Treat the paid advertising sections as optional if they exceed your capacity.
6. After the event, send the thank-you messages and note what worked for next time.

## What You Need

- A confirmed event date and a place for people to register or learn more.
- A marketing lead and, ideally, one or two helpers.
- Access to your social accounts, email tool, and website.
- A simple set of graphics or photos, even basic ones.
- A realistic sense of the time your team can give each week.

# Event Ready Marketing Timeline Template

# [Event Name]: Marketing Timeline Template

**Event Date:** [Event Date]

**Event Type:** [Conference / Festival / Workshop / Fundraiser / Sporting Event / Community Event / Corporate Event]

**Registration Link:** [Registration Link]

**Primary Hashtag:** [#EventName]

**Marketing Lead:** [Name]

**Budget:** [$ Amount]

## How to Use This Template

Copy this document into Google Docs, Notion, Microsoft Word, or Canva. Replace all bracketed placeholders with your event details. Work through each phase in order. Check off items as you complete them. If your event timeline is shorter than six months, compress the early phases and start at the stage that matches your current lead time.

## Before You Start: Notes for Small and Rural Teams

**Local and offline channels (Creston Valley).** This template leans digital, but in the Creston Valley some of the best reach comes from offline channels, especially for a 50+ audience. Alongside social media and email, plan for community notice boards, local radio, the local newspaper, posters in shops and community hubs, and community Facebook groups. Treat these as core channels, not extras.

**Paid advertising is optional.** The Paid Advertising sections below assume an ad budget, retargeting pixels, and multi-platform campaigns. A small volunteer team can run a successful

event with organic and local channels alone. Skip the paid sections if they exceed your capacity. You are not behind for leaving them out.

**Keep communications accessible.** Add alt text to images, captions to video, and write in plain language so everyone can follow. These steps tie directly to the Accessibility Checklist in this toolkit.

## Lite Plan (one page, for small or short-lead events)

If you have a small team or less than three months, work this short version instead of the full phased plan:

- **Now:** Confirm date, location, and a one-line reason to attend. Set up or refresh one social page. Post a save-the-date. Put up posters and notices in town.
- **Weekly:** Post once or twice on social, share to community Facebook groups, and send a short email update to your list.
- **One month out:** Send details to local radio and the newspaper. Ask partners and sponsors to share one post each. Confirm registration or ticket info is easy to find.
- **Two weeks out:** Increase posting, add "final days" messaging, and send a reminder email.
- **Event week:** Post daily, share practical details (parking, timing, what to bring), and line up someone to take photos.
- **After:** Post a thank-you and a few photos within a couple of days, and send a thank-you email with a short feedback survey.

# Phase 1: 6+ Months Before Event

### Marketing Objectives

- Define what success looks like: target attendance, revenue, donations, or awareness goals
- Establish brand identity and core messaging for the event
- Build the digital foundation that all future promotion will point to

### Key Tasks

| ☐ | Task | Owner | Due Date |
|---|---|---|---|
| ☐ | Set SMART goals (Specific, Measurable, Achievable, Relevant, Time-bound) | [Name] | [Date] |
| ☐ | Define 2–3 audience personas (who they are, where they spend time, what motivates them) | [Name] | [Date] |
| ☐ | Craft a one-sentence Event Value Proposition | [Name] | [Date] |
| ☐ | Confirm event format (in-person, virtual, hybrid) | [Name] | [Date] |
| ☐ | Secure venue, speakers, sponsors, and partners | [Name] | [Date] |
| ☐ | Assign marketing roles and responsibilities | [Name] | [Date] |

### Recommended Content to Create

- Event logo, brand colours, and font selection
- Brand style guide (one page: colours, fonts, logo usage, tone of voice)
- Save-the-date graphic for social media and email
- Speaker confirmation graphics (as speakers are confirmed)

### Social Media Activities

- ☐ Create or refresh event social media accounts/pages

- ☐ Post first "save the date" announcement with [Event Date]
- ☐ Share behind-the-scenes planning content (venue selection, speaker outreach)
- ☐ Establish [#EventName] hashtag and use it consistently

**Email Marketing Actions**

- ☐ Build or segment your email list (past attendees, prospects, partners)
- ☐ Send a save-the-date email to past attendees and warm contacts
- ☐ Set up email automation platform (Mailchimp, Constant Contact, etc.)

**Paid Advertising**

- ☐ Allocate paid advertising budget across channels
- ☐ Research target audience demographics for ad platform selection
- ☐ Not yet launching ads. Focus on organic foundation first

**Partnership and Sponsor Promotion**

- ☐ Confirm sponsor and partner agreements
- ☐ Provide sponsors with a promotional toolkit (logos, sample social copy, key dates)
- ☐ Agree on cross-promotion commitments and timelines

**Website Updates**

- ☐ Launch event landing page with date, location, value proposition, and email signup form
- ☐ Add registration button (even if registration is not yet open, collect email addresses)
- ☐ Ensure mobile optimization
- ☐ Set up Google Analytics or equivalent tracking

# Phase 2: 3 Months Before Event

### Marketing Objectives

- Begin active promotion and build public awareness
- Open registration and capture early sign-ups
- Give people concrete reasons to attend

### Key Tasks

| ☐ | Task | Owner | Due Date |
|---|---|---|---|
| ☐ | Open registration / ticket sales | [Name] | [Date] |
| ☐ | Launch early-bird pricing with a clear deadline | [Name] | [Date] |
| ☐ | Publish full event agenda and speaker list | [Name] | [Date] |
| ☐ | Create a content calendar for the next 12 weeks | [Name] | [Date] |
| ☐ | Brief sponsors on their promotional commitments | [Name] | [Date] |

### Recommended Content to Create

- Speaker spotlight graphics (one per speaker)
- Agenda reveal graphic or video
- Early-bird promotional graphics
- Blog post or article announcing the event and what attendees will gain
- Short teaser video (30–60 seconds)

### Social Media Activities

- ☐ Post 3–4 times per week across primary platforms
- ☐ Share speaker announcements one at a time to build anticipation
- ☐ Post agenda and session highlights
- ☐ Share early-bird deadline reminders
- ☐ Encourage speakers and partners to share event posts with their networks

### Email Marketing Actions

- ☐ Send registration launch email to full list
- ☐ Send early-bird reminder email (segmented: past attendees vs. new prospects)
- ☐ Set up automated confirmation email for new registrants
- ☐ Begin a biweekly newsletter with event updates

**Paid Advertising**

- ☐ Launch awareness campaigns on [Facebook / Instagram / LinkedIn / Google Ads]
- ☐ Target based on audience personas and geographic location
- ☐ Set up retargeting pixel on registration page
- ☐ Monitor cost per click and adjust budget allocation weekly

**Partnership and Sponsor Promotion**

- ☐ Ask sponsors to post about the event on their channels
- ☐ Provide partners with ready-to-share graphics and email templates
- ☐ Coordinate timing so partner posts align with your promotional pushes

**Website Updates**

- ☐ Update landing page with full agenda, speaker bios, and pricing
- ☐ Add FAQ section
- ☐ Add sponsor logos and partner acknowledgements
- ☐ Test registration flow end to end

# Phase 3: 2 Months Before Event

### Marketing Objectives

- Convert awareness into registrations
- Maintain consistent visibility across channels
- Build social proof and momentum

### Key Tasks

| ☐ | Task | Owner | Due Date |
|---|---|---|---|
| ☐ | Close early-bird pricing and transition to standard pricing | [Name] | [Date] |
| ☐ | Publish speaker interviews or blog features | [Name] | [Date] |
| ☐ | Confirm and promote any VIP or exclusive experiences | [Name] | [Date] |
| ☐ | Review registration numbers and adjust strategy if behind target | [Name] | [Date] |

### Recommended Content to Create

- Speaker Q&A blog posts or short video clips
- Testimonial graphics from past attendees (if applicable)
- "Top 5 Reasons to Attend" graphic
- Short-form video content for social media (Reels, TikToks, Shorts)
- Printable or digital flyer for community distribution

### Social Media Activities

- ☐ Increase posting frequency to 4–5 times per week
- ☐ Share behind-the-scenes content (preparation, venue setup, team planning)
- ☐ Post countdown graphics (e.g., "8 weeks to go!")
- ☐ Share attendee testimonials or past event highlights
- ☐ Run a poll or interactive question to boost engagement

### Email Marketing Actions

- ☐ Send "early-bird closing" email with deadline urgency
- ☐ Send "standard pricing now live" email

- ☐ Send speaker feature email highlighting 2–3 key speakers
- ☐ Segment non-openers and send a re-engagement email with a new subject line

**Paid Advertising**

- ☐ Shift ad strategy from awareness to conversion
- ☐ Launch retargeting campaign targeting website visitors who did not register
- ☐ Test 2–3 ad creatives and identify top performers
- ☐ Increase budget on best-performing channels

**Partnership and Sponsor Promotion**

- ☐ Ask sponsors to share a "why we're sponsoring" post
- ☐ Coordinate a joint giveaway or contest with a partner
- ☐ Feature sponsors in email newsletter or social posts

**Website Updates**

- ☐ Add countdown timer to landing page
- ☐ Update pricing to reflect standard rates
- ☐ Add new speaker announcements as confirmed
- ☐ Highlight any new sessions or program additions

# Phase 4: 1 Month Before Event

### Marketing Objectives

- Create urgency and drive final wave of registrations
- Prepare registered attendees for a great experience
- Maximize sponsor and partner visibility

### Key Tasks

| ☐ | Task | Owner | Due Date |
|---|---|---|---|
| ☐ | Send logistical details to registered attendees | [Name] | [Date] |
| ☐ | Finalize day-of social media content and schedule posts | [Name] | [Date] |
| ☐ | Confirm all sponsor promotional deliverables are complete | [Name] | [Date] |
| ☐ | Prepare attendee welcome email sequence | [Name] | [Date] |

### Recommended Content to Create

- "One month to go" countdown graphic
- Speaker quote cards for social sharing
- Attendee preparation guide (what to bring, dress code, schedule overview)
- Short video from a speaker or organizer saying "see you there"
- Day-of social media graphic templates for live posting

### Social Media Activities

- ☐ Post daily across primary platforms
- ☐ Share "limited spots remaining" messaging (if applicable)
- ☐ Post speaker spotlights daily or every other day
- ☐ Encourage registered attendees to post that they are attending
- ☐ Share practical info (parking, check-in times, what to expect)

### Email Marketing Actions

- ☐ Send "one month to go" update with agenda highlights
- ☐ Send "last chance to register" email to non-registrants

- ☐ Send attendee logistics email (directions, parking, check-in, WiFi)
- ☐ Set up day-of reminder email (sent morning of event)

**Paid Advertising**

- ☐ Increase retargeting budget for final push
- ☐ Run "last chance" ad creative with urgency messaging
- ☐ Pause underperforming ads and concentrate spend on top converters
- ☐ Consider geo-targeted ads if the event is location-specific

**Partnership and Sponsor Promotion**

- ☐ Ask sponsors to post "we'll see you at [Event Name]" messages
- ☐ Provide sponsors with final graphics for their own promotion
- ☐ Confirm any on-site activation or booth details to promote

**Website Updates**

- ☐ Add "limited spots remaining" banner if applicable
- ☐ Update FAQ with last-minute questions (parking, accessibility, refunds)
- ☐ Post final agenda with room locations and times
- ☐ Ensure registration page is still functioning and mobile-friendly

# Phase 5: 2 Weeks Before Event

### Marketing Objectives

- Maximize urgency for last-minute registrants
- Ensure registered attendees feel prepared and excited
- Finalize all day-of logistics and content

### Key Tasks

| ☐ | Task | Owner | Due Date |
|---|---|---|---|
| ☐ | Send final registration reminder to non-registrants | [Name] | [Date] |
| ☐ | Confirm all scheduled social posts are loaded and ready | [Name] | [Date] |
| ☐ | Test all technology (event app, live stream, registration system) | [Name] | [Date] |
| ☐ | Print or prepare on-site materials (signage, name badges, programs) | [Name] | [Date] |

### Recommended Content to Create

- "Two weeks to go" countdown graphic
- "Final days to register" urgency graphic
- Attendee tip sheet (how to get the most out of the event)
- Day-of run-of-show for internal team
- Pre-written social posts for event day (scheduled in advance)

### Social Media Activities

- ☐ Post daily with urgency messaging
- ☐ Share "countdown" posts (e.g., "Only 14 days until [Event Name]!")
- ☐ Repost any attendee-generated content about attending
- ☐ Share practical reminders (parking, arrival time, what to bring)
- ☐ Post a short video from the organizer or MC welcoming attendees

### Email Marketing Actions

- ☐ Send "two weeks to go" email with final agenda and practical details
- ☐ Send "final call to register" email to non-registrants (segmented)

- ☐ Send "getting ready" email to registered attendees with preparation tips
- ☐ Confirm email automation for day-of reminders is scheduled

**Paid Advertising**

- ☐ Run final retargeting push with "last chance" creative
- ☐ Increase daily ad spend for final 14 days if budget allows
- ☐ Monitor registration conversion daily

**Partnership and Sponsor Promotion**

- ☐ Send sponsors a final reminder to promote the event
- ☐ Confirm sponsor logos and messaging are correct on all materials
- ☐ Share final attendee count projections with sponsors

**Website Updates**

- ☐ Add "final days to register" banner
- ☐ Confirm all event details are current and accurate
- ☐ Test registration page one final time on mobile and desktop
- ☐ Add live stream or virtual access details if applicable

## Phase 6: 1 Week Before Event

**Marketing Objectives**

- Drive any remaining last-minute registrations
- Ensure attendees have everything they need
- Prepare for real-time event day coverage

**Key Tasks**

| ☐ | Task | Owner | Due Date |
|---|---|---|---|
| ☐ | Send final attendee confirmation with all logistics | [Name] | [Date] |
| ☐ | Confirm day-of social media responsibilities (who posts, who responds) | [Name] | [Date] |

| | | | |
|---|---|---|---|
| ☐ | Prepare photo and video capture plan for event day | [Name] | [Date] |
| ☐ | Brief volunteers or staff on social media and engagement roles | [Name] | [Date] |

**Recommended Content to Create**

- "One week to go" graphic
- Final speaker spotlight posts
- "See you next week" short video
- Day-of social media post templates (fill-in-the-blank for live posting)
- Attendee welcome packet or digital guide

**Social Media Activities**

- ☐ Post daily across all platforms
- ☐ Share "one week to go" countdown
- ☐ Post final speaker spotlights
- ☐ Encourage attendees to share their excitement using [#EventName]
- ☐ Share any final program updates or additions

**Email Marketing Actions**

- ☐ Send "one week to go" email to registered attendees (final details, what to expect)
- ☐ Send "last chance" email to non-registrants if registration is still open
- ☐ Schedule day-of reminder email (sent 2 hours before event start)
- ☐ Prepare post-event thank-you email draft (to send within 24 hours after)

**Paid Advertising**

- ☐ Maintain or increase retargeting spend for final push
- ☐ Pause any awareness campaigns that are not driving registrations
- ☐ Focus all remaining budget on conversion-focused ads

**Partnership and Sponsor Promotion**

- ☐ Send sponsors a final promotional reminder with suggested posts
- ☐ Confirm on-site sponsor activation details
- ☐ Thank sponsors publicly in a social post or email

**Website Updates**

- ☐ Update homepage or landing page with "event week" messaging

- ☐ Confirm registration is still open (or mark as sold out / closed)
- ☐ Post final agenda and any last-minute changes
- ☐ Ensure contact information for day-of questions is visible

# Phase 7: Event Day

### Marketing Objectives

- Deliver a great attendee experience in real time
- Capture content for post-event promotion
- Amplify the event beyond the room through social media

### Key Tasks

| ☐ | Task | Owner | Due Date |
|---|---|---|---|
| ☐ | Post live updates throughout the day | [Name] | [Date] |
| ☐ | Capture photos, videos, and quotes for post-event content | [Name] | [Date] |
| ☐ | Monitor and reshare attendee posts using [#EventName] | [Name] | [Date] |
| ☐ | Send day-of reminder and welcome emails | [Name] | [Date] |

### Recommended Content to Create

- Real-time social media posts (photos, short videos, quotes)
- Instagram Stories or TikTok clips throughout the day
- Live tweets or thread of key moments
- Photo or video booth content for attendee sharing
- Recorded sessions for post-event follow-up (if applicable)

### Social Media Activities

- ☐ Post opening announcement ("[Event Name] is underway!")
- ☐ Share photos of attendees arriving and engaging
- ☐ Post speaker quotes and session highlights in real time
- ☐ Reshare attendee stories and posts
- ☐ Post closing thank-you message at end of day
- ☐ Use Instagram Stories or Facebook Stories for live coverage

### Email Marketing Actions

- ☐ Send morning-of reminder email to registered attendees
- ☐ Send virtual access instructions (if hybrid or virtual)

- ☐ Prepare post-event thank-you email to send within 24 hours

**Paid Advertising**

- ☐ Pause registration ads (registration is closed)
- ☐ Consider boosting a high-performing social post to extend event-day reach
- ☐ Run a "join us next year" ad if future event is confirmed

**Partnership and Sponsor Promotion**

- ☐ Tag and thank sponsors in social posts throughout the day
- ☐ Photograph sponsor booths and activations for post-event content
- ☐ Invite sponsors to share their own event-day content

**Website Updates**

- ☐ Post "today is the day" banner on website
- ☐ Share live stream link if applicable
- ☐ Update social media feeds or embed live social wall
- ☐ Post day-of photos to event gallery as available

# Phase 8: Post-Event (1–14 Days After)

### Marketing Objectives

- Thank attendees, speakers, sponsors, and partners
- Capture feedback and measure results
- Repurpose event content for ongoing engagement
- Set up the next event or campaign

### Key Tasks

| ☐ | Task | Owner | Due Date |
|---|---|---|---|
| ☐ | Send thank-you emails within 24–48 hours | [Name] | [Date] |
| ☐ | Distribute attendee feedback survey | [Name] | [Date] |
| ☐ | Share recorded sessions, photos, and highlight reel | [Name] | [Date] |
| ☐ | Compile post-event report (attendance, ROI, channel performance) | [Name] | [Date] |
| ☐ | Follow up with leads captured during the event | [Name] | [Date] |

### Recommended Content to Create

- Event highlight reel or recap video (1–2 minutes)
- Photo gallery on website or social media
- Blog post recap with key takeaways
- Speaker quote graphics for ongoing social content
- Attendee testimonial graphics (from survey responses or live captures)
- Case study or success story (for corporate or fundraising events)

### Social Media Activities

- ☐ Post thank-you message to attendees, speakers, sponsors within 24 hours
- ☐ Share highlight reel or recap video
- ☐ Post photo galleries across platforms
- ☐ Share attendee testimonials and quotes
- ☐ Post "see you next year" or "stay connected" messaging
- ☐ Repurpose session content into shorter posts over 1–2 weeks

### Email Marketing Actions

- ☐ Send thank-you email to attendees (within 24 hours) with survey link
- ☐ Send thank-you email to speakers and sponsors (within 48 hours)
- ☐ Send content follow-up email (recordings, slides, photos) within 3–5 days
- ☐ Send "missed the event" email to non-attendees with highlight content
- ☐ Send "save the date" for next event if applicable (within 7–14 days)

### Paid Advertising

- ☐ Pause all event registration ads
- ☐ Run a retargeting campaign to non-attendees with highlight content (if future event planned)
- ☐ Boost recap video or highlight post to extend brand reach

### Partnership and Sponsor Promotion

- ☐ Send sponsors a post-event report with engagement metrics
- ☐ Thank sponsors publicly in social posts and email
- ☐ Share sponsor-specific content (booth photos, activation highlights)
- ☐ Discuss renewal or expansion for next event

### Website Updates

- ☐ Replace registration page with post-event recap page
- ☐ Add photo gallery and highlight video
- ☐ Post blog recap or key takeaways
- ☐ Add "subscribe for updates" or "save the date for next year" section
- ☐ Update event page to reflect future dates if confirmed

# Master Marketing Checklist: [Event Name]

A quick-reference summary of every task, in chronological order. Print this page or keep it open in a separate tab.

## 6+ Months Before

- ☐ Set SMART goals and KPIs
- ☐ Define 2–3 audience personas
- ☐ Craft Event Value Proposition
- ☐ Confirm event format
- ☐ Secure venue, speakers, sponsors
- ☐ Assign marketing roles
- ☐ Create brand identity (logo, colours, fonts)
- ☐ Create save-the-date graphic
- ☐ Set up social media accounts/pages
- ☐ Post first save-the-date announcement
- ☐ Build or segment email list
- ☐ Send save-the-date email
- ☐ Set up email automation platform
- ☐ Confirm sponsor agreements and provide promotional toolkit
- ☐ Launch event landing page with email signup
- ☐ Set up analytics tracking

## 3 Months Before

- ☐ Open registration / ticket sales
- ☐ Launch early-bird pricing
- ☐ Publish full agenda and speaker list
- ☐ Create 12-week content calendar
- ☐ Brief sponsors on promotional commitments
- ☐ Create speaker spotlight graphics
- ☐ Create teaser video
- ☐ Post 3–4 times per week on social media
- ☐ Share speaker announcements
- ☐ Send registration launch email
- ☐ Send early-bird reminder email
- ☐ Set up automated confirmation email
- ☐ Launch paid awareness campaigns
- ☐ Set up retargeting pixel
- ☐ Ask sponsors to post about the event

- ☐ Update website with full agenda, speaker bios, pricing, FAQ
- ☐ Test registration flow

## 2 Months Before

- ☐ Close early-bird pricing, transition to standard
- ☐ Publish speaker interviews or blog features
- ☐ Confirm VIP or exclusive experiences
- ☐ Review registration numbers and adjust strategy
- ☐ Create testimonial and "reasons to attend" graphics
- ☐ Create short-form video content
- ☐ Increase social posting to 4–5 times per week
- ☐ Share behind-the-scenes content
- ☐ Post countdown graphics
- ☐ Send early-bird closing email
- ☐ Send standard pricing email
- ☐ Send speaker feature email
- ☐ Send re-engagement email to non-openers
- ☐ Shift ad strategy to conversion
- ☐ Launch retargeting campaign
- ☐ Test 2–3 ad creatives
- ☐ Ask sponsors to share "why we're sponsoring" posts
- ☐ Add countdown timer to website
- ☐ Update website pricing and speaker additions

## 1 Month Before

- ☐ Send logistical details to registered attendees
- ☐ Finalize day-of social content and schedule posts
- ☐ Confirm sponsor deliverables
- ☐ Prepare attendee welcome email sequence
- ☐ Create countdown and speaker quote graphics
- ☐ Create attendee preparation guide
- ☐ Post daily on social media
- ☐ Share "limited spots remaining" messaging
- ☐ Encourage registered attendees to post they are attending
- ☐ Send "one month to go" email
- ☐ Send "last chance to register" email
- ☐ Send attendee logistics email
- ☐ Schedule day-of reminder email
- ☐ Increase retargeting budget
- ☐ Run "last chance" ad creative

- ☐ Ask sponsors to post "we'll see you at [Event Name]"
- ☐ Add "limited spots" banner to website
- ☐ Update FAQ
- ☐ Post final agenda

## 2 Weeks Before

- ☐ Send final registration reminder
- ☐ Confirm scheduled social posts are loaded
- ☐ Test all technology
- ☐ Prepare on-site materials
- ☐ Create urgency graphics and tip sheets
- ☐ Prepare pre-written day-of social posts
- ☐ Post daily with urgency messaging
- ☐ Share countdown posts
- ☐ Repost attendee-generated content
- ☐ Send "two weeks to go" email
- ☐ Send "final call to register" email
- ☐ Send "getting ready" email to attendees
- ☐ Confirm day-of email automation
- ☐ Run final retargeting push
- ☐ Send sponsors final promotional reminder
- ☐ Add "final days to register" banner to website
- ☐ Test registration page on mobile and desktop
- ☐ Add live stream details if applicable

## 1 Week Before

- ☐ Send final attendee confirmation
- ☐ Confirm day-of social media responsibilities
- ☐ Prepare photo and video capture plan
- ☐ Brief volunteers on engagement roles
- ☐ Create "one week to go" and final speaker content
- ☐ Create day-of social post templates
- ☐ Post daily across all platforms
- ☐ Encourage attendees to share excitement using [#EventName]
- ☐ Send "one week to go" email to attendees
- ☐ Send "last chance" email to non-registrants
- ☐ Schedule day-of reminder email
- ☐ Prepare post-event thank-you email draft
- ☐ Maintain retargeting spend
- ☐ Pause non-converting ads

- ☐ Send sponsors final promotional reminder
- ☐ Thank sponsors publicly
- ☐ Update website with "event week" messaging
- ☐ Confirm registration status (open or sold out)

## Event Day

- ☐ Post live updates throughout the day
- ☐ Capture photos, videos, and quotes
- ☐ Monitor and reshare attendee posts
- ☐ Send morning-of reminder email
- ☐ Send virtual access instructions if applicable
- ☐ Prepare post-event thank-you email for sending within 24 hours
- ☐ Pause registration ads
- ☐ Consider boosting a high-performing social post
- ☐ Tag and thank sponsors in social posts
- ☐ Photograph sponsor activations
- ☐ Post "today is the day" banner on website
- ☐ Share live stream link if applicable
- ☐ Post day-of photos to event gallery

## Post-Event (1–14 Days After)

- ☐ Send thank-you emails within 24–48 hours
- ☐ Distribute attendee feedback survey
- ☐ Share recordings, photos, and highlight reel
- ☐ Compile post-event report
- ☐ Follow up with leads
- ☐ Create highlight reel or recap video
- ☐ Create blog post recap
- ☐ Create attendee testimonial graphics
- ☐ Post thank-you message within 24 hours
- ☐ Share highlight reel on social media
- ☐ Post photo galleries
- ☐ Share attendee testimonials
- ☐ Post "see you next year" messaging
- ☐ Send thank-you email to attendees with survey link
- ☐ Send thank-you email to speakers and sponsors
- ☐ Send content follow-up email (recordings, slides, photos)
- ☐ Send "missed the event" email to non-attendees
- ☐ Send "save the date" for next event if applicable
- ☐ Pause all registration ads

- ☐ Run retargeting to non-attendees with highlights (if future event planned)
- ☐ Send sponsors post-event report with metrics
- ☐ Thank sponsors publicly
- ☐ Replace registration page with recap page
- ☐ Add photo gallery and highlight video to website
- ☐ Post blog recap
- ☐ Add "subscribe for updates" section

# Front matter: Accessibility Checklist

## Why It's Important

An accessible event is one where everyone can take part, including people with disabilities, older attendees, families, and anyone facing a barrier. This checklist walks through the venue, promotion, food, room setup, sensory needs, presentations, digital access, service animals, and volunteer readiness so accessibility is planned rather than patched together on the day. Many of these steps cost little and make the event better for everyone. The earlier you use it, the more it can shape choices like which venue you book.

## How to Use

1. Read the checklist early, before you confirm a venue, since the venue affects most items.
2. Fill in the event details at the top, including the accessibility contact and the volunteer responsible on the day.
3. Work through each section and check off what you have arranged.
4. Use the digital and virtual section for any event with an online element.
5. Invite attendees to request accommodations in your promotion, and give a contact and a deadline.
6. Review after the event and note what to improve.

## What You Need

- A venue assessed against the checklist before booking.
- A named accessibility contact for attendee requests.
- A volunteer assigned to handle barriers during the event.
- Clear signage, reserved seating, and accessible washrooms confirmed.
- A way to gather accessibility feedback afterward.

# Event Ready Accessibility Checklist

Sourced from Accessibility Canada's guidelines in June 2026
https://accessibilitycanada.ca/wp-content/uploads/2016/06/Planning-Accessible-Events-May-2016.pdf

**A living starting point.** This checklist is drawn from the 2016 Accessibility Canada guidance. Treat it as a starting point and update it as standards and your community's needs change. Read it early, before you confirm a venue, since the venue affects most items.

# Accessible Events Checklist

Use this checklist to help you plan your event so everyone can participate.

## Event Information

- **Name of Event:** _____
- **Date and Time:** _____
- **Event Location:** _____
- **Number of Attendees:** _____
- **Accessibility contact (name / phone / email):** _____
- **Volunteer responsible on the day:** _____

## Venue

☐ Accessible parking/passenger drop-off area

☐ Located near public transportation

☐ Outdoor and indoor pathways free of barriers

☐ Doors easy to open

☐ Accessible washrooms

☐ Adjustable lighting

☐ Good acoustics (minimal echo)

## Invitations and Promotion

☐ Due dates and contact information for accessibility requests included

☐ A variety of communication methods used

☐ Printed materials use a minimum 12-point font

## Food and Refreshments

☐ Food, drinks, and utensils easy to reach for people using wheelchairs

☐ Bendable straws and cups with handles available

☐ Food buffet assistance available

## Room Set-up

☐ Clear, easy-to-read signs

☐ Clear floor space

☐ Cables and wiring secured

☐ Chairs provided and volunteer stand-ins available near registration or ticket sales tables

☐ Reserved seating available

## Sensory and Scent Considerations

☐ Quiet or low-stimulation space available for anyone who needs a break

☐ Event promoted as scent-aware, asking attendees to limit strong fragrances

☐ Lighting and sound levels kept comfortable, with strobe or flashing effects avoided or flagged in advance

## Speeches and Presentations

☐ Speakers provided with accessibility tips

## Digital and Virtual Accessibility

*Use this section for any event with an online element, such as online registration, a live stream, or shared slides.*

☐ Captions provided for video and any live-streamed content

☐ Registration form works with a screen reader and keyboard, and does not rely on colour alone

☐ Images in emails, posts, and slides include alt text

☐ Documents and web pages use plain language and clear headings

☐ A contact is offered for anyone who needs an alternative format

## Service Animals

☐ Relief area available for service animals

☐ Water bowl provided

## Volunteers

☐ Volunteer assigned to resolve accessibility barriers

☐ Volunteers reminded to ask guests, **"How may I help you?"**

# Sources

Factual claims specific to British Columbia are grounded in the following. Confirm current requirements with the named authorities before relying on them, since rules and fees change.

**Gaming licences for raffles and 50/50 draws (BC):**

- Independent Gaming Control Office (IGCO), *Licensed Charitable Gaming Event Guidance* (updated April 2026): https://www.igcobc.ca/sites/default/files/assets/documents/licenced_charitable_gaming_event_guidance.pdf
- PROBUS Canada, summary of provincial raffle and 50/50 licensing, citing BC's requirement to apply for a licence in advance for charitable or religious purposes: https://probuscanada.freshdesk.com/support/solutions/articles/151000030771

**BC privacy law for non-profits and volunteer data (PIPA):**

- B.C. Civil Liberties Association, privacy handbook, on PIPA applying to every BC organization including non-profits, associations, teams, and clubs: https://bccla.org/privacy-handbook/main-menu/privacy1contents/privacy1-2a.1.html
- Charity Law Group, on BC PIPA covering charities and not-for-profits for all activities: https://www.charitylawgroup.ca/charity-law-questions/compliance-obligations-for-privacy-legislation-charities-and-not-for-profits
- Oversight by the Office of the Information and Privacy Commissioner for BC (OIPC BC).

**Accessibility source cited in the checklist:**

- Accessibility Canada, *Planning Accessible Events* (May 2016), as referenced in the Accessibility Checklist template.

event ready

# Visit eventready.ca for more information on the EventReady program, digital templates and to submit your event.

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Hello Agency

The EventReady Volunteer Coordinator Resource Guide and associated templates were prepared by Hello Agency Inc. If you or your organization have any questions about the use of the guide, please do not hesitate to reach out us at jenn@helloagency.co or dylan@helloageny.co