


# Event Planning Checklist for Hosts



Use this checklist before you book, pay, or confirm anything for your event.

 Quick Tip: Pair this checklist with a scratch piece of paper, journal, or notebook to help you keep track of loose ends and important details, like contact information or deadlines.

## Step 1: Lock In The Basics

Task	Done
Define the purpose of your event	<input type="checkbox"/>
Decide on the event style (casual, formal, etc.)	<input type="checkbox"/>
Choose a date and backup date	<input type="checkbox"/>
Set your budget range	<input type="checkbox"/>
Estimate your guest count, including plus-ones	<input type="checkbox"/>
Decide whether the event will be indoors, outdoors, or both	<input type="checkbox"/>

## Step 2: Determine What Your Event Needs

Task	Done
List the vendors, services, rentals, and equipment you may need	<input type="checkbox"/>
Confirm whether you need food service or catering	<input type="checkbox"/>
Confirm whether alcohol will be served or sold (and who's serving it)	<input type="checkbox"/>
Confirm whether you need entertainment, music, or speakers	<input type="checkbox"/>

## Step 3: Review Venue Rules (Before You Sign Or Pay)

Task	Done
Choose a venue that fits your budget, guest count, and layout needs	<input type="checkbox"/>
Confirm accessibility, location, and parking needs	<input type="checkbox"/>
Review venue rules for setup, teardown, and restricted activities	<input type="checkbox"/>
Ask whether the venue has a preferred vendor list	<input type="checkbox"/>
Confirm vendor load-in/load-out times	<input type="checkbox"/>
Confirm all venue deadlines before paying a deposit	<input type="checkbox"/>

## Step 4: Confirm Certificate Of Insurance (COI) Requirements

Task	Done
Check whether event insurance is required and how much (the liability limits)	<input type="checkbox"/>
Confirm whether the venue must be listed as an additional insured	<input type="checkbox"/>
Confirm required endorsements or special wording requested by the venue	<input type="checkbox"/>
Get the exact venue name, address, and certificate holder details for the COI	<input type="checkbox"/>
Confirm the COI submission deadline	<input type="checkbox"/>
Verify your COI includes setup, event, and teardown dates if required	<input type="checkbox"/>
Make sure your coverage matches your event activities, including alcohol service	<input type="checkbox"/>

## Step 5: Check Permits & Local Requirements


Task	Done
Check whether your city or county requires a special event permit	<input type="checkbox"/>
Confirm whether alcohol, food service, or live music requires permits or approval	<input type="checkbox"/>
Confirm whether public property or street use needs separate permission	<input type="checkbox"/>
Apply for any required permits early	<input type="checkbox"/>

## Step 6: Stay On Top Of Vendor Paperwork

Task	Done
Confirm which vendors need their own insurance	<input type="checkbox"/>
Check whether vendors also need to list the venue as an additional insured	<input type="checkbox"/>
Collect vendor COIs and any required venue paperwork	<input type="checkbox"/>
Verify vendor coverage is active for your event date	<input type="checkbox"/>
Make sure all vendor documents are submitted on time	<input type="checkbox"/>
Store contracts, receipts, permits, and insurance documents in one place	<input type="checkbox"/>
Save vendor paperwork and venue contact information in the same folder	<input type="checkbox"/>
Track all deadlines in a calendar or shared document	<input type="checkbox"/>

## Step 7: Final Review Before Your Event

Task	Done
Create your setup, event-day, and teardown timeline	<input type="checkbox"/>
Confirm vendor arrival times and who is responsible for final checks	<input type="checkbox"/>
Make backup plans for weather, delays, no-shows, or equipment issues	<input type="checkbox"/>
Confirm all payments and deposits are complete	<input type="checkbox"/>
Confirm the venue has received your COI	<input type="checkbox"/>
Verify the final guest count fits venue limits	<input type="checkbox"/>
Keep digital copies of key documents handy on event day	<input type="checkbox"/>
Do a final walk-through the day before	<input type="checkbox"/>

 Nice work! You've covered the key details that help your event run more smoothly. Save this checklist and revisit it anytime you're planning another event.