

Planning a Charity Event?

Use This Step-by-Step Checklist to Ensure Success

Brought to you by WRS Insurance Brokers - Supporting Charities with Confidence

Whether you're hosting a gala dinner, a community fundraiser, or a sponsored challenge, careful planning is essential for ensuring its success and making certain you are protected along the way.

That's why we have created this practical, step-by-step checklist to help you stay organised so you can focus on making a difference. With years of experience supporting charities and not-for-profits with their **Charity Event Insurance**, we recognise the unique challenges you encounter.

Use this guide as your go-to reference and if you have any questions about **Charity Insurance** for your next event, from public liability to cancellation cover, our friendly, knowledgeable team can help.

Initial Planning

- Define the event purpose (e.g. fundraising, awareness, networking)
- Set clear, measurable objectives
- Identify your target audience
- Decide on the event format (virtual, hybrid, or in-person)
- Choose a suitable date and time
- Create a detailed, realistic budget
- Delegate tasks and define responsibilities

Venue & Logistics

- Book a suitable venue (ensure accessibility and facilities)
- Consider weather and backup plans (e.g. marquees or indoor options)
- Arrange necessary equipment (AV, lighting, staging)
- Ensure protection is in place (public liability, cancellation cover - speak to WRS for tailored advice)
- Conduct risk assessments and health & safety checks
- Confirm arrangements for security, first aid, and safeguarding
- Organise food and drink (consider dietary requirements)

Marketing & Promotion

- Create a marketing plan with key dates (consider a hashtag or branded campaign name)
- Design promotional materials (flyers, social posts, banners)
- Promote via website, social media, email newsletters, and local press
- Send out invites and RSVPs
- Engage local businesses or influencers to boost reach

Fundraising & Finance

- Set clear fundraising targets
- Secure sponsorships or partnerships
- Organise raffles, auctions, or competitions
- Track income and expenditure accurately
- Apply for grants if applicable
- Choose donation/payment methods (online platforms, contactless, cash) and plan safe cash handling procedures:
 - Limit the amount of cash on-site where possible
 - Use secure cash boxes and restrict access to authorised staff
 - Arrange regular collection or secure storage during the event
 - Avoid counting cash in public areas
 - Have two people present when handling or transporting money

📞 01206 760 780

✉️ hello@wrsinsurance.co.uk

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Legal & Compliance

- Obtain relevant licenses (music, alcohol, lottery etc.)
- Check insurance cover is adequate (contact WRS for advice)
- Confirm all GDPR requirements are met for data collection
- Ensure safeguarding procedures are in place for children/vulnerable adults
- Register with local authorities if needed

Volunteers & Staffing

- Recruit and brief volunteers and staff
- Provide training where necessary
- Allocate roles (e.g. welcome desk, raffle coordinator, tech support)
- Create an event-day contact list for coordination

Event Day

- Arrive early and do final checks
- Set up signage, registration, and donation stations
- Welcome guests and make announcements
- Take photos and gather content for use in post-event updates and future promotions
- Monitor timings and manage crowd flow

After the Event

- Thank attendees, donors, and volunteers
- Share outcomes and success stories (funds raised, feedback)
- Post photos and updates on social media
- Evaluate what went well and what can be improved
- Report back to trustees and funders
- Finalise paperwork, close the budget, and archive event materials

At **WRS Insurance Brokers**, we're proud to support charities across the UK, from securing tailored event insurance to providing helpful guidance.

WRS is part of the **Benefact Group**, a charity-owned, international family of financial services companies that gives all available profits to charity and good causes.

If you need expert insurance advice or tailored cover for your next charity event, WRS Insurance Brokers is just a call or click away.

Our products, policies and advice



help protect and grow what matters most to our clients



and because we give all available profits to charity



they make the lives of others a little brighter too.

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