Downtown Orillia Business Improvement Area (DOBIA)

Event Planner

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Welcome

Planning an event in Downtown Orillia can bring people downtown, support local businesses, strengthen community connections and contribute to a vibrant downtown. This Event Planner brings together the key information organizers need to plan and deliver an event in Downtown Orillia, including:

- How to work with the Downtown Orillia Business Improvement Area (DOBIA);
- What information DOBIA needs from event organizers;
- How to apply for DOBIA support or funding;
- Planning, safety and insurance considerations;
- Municipal permits and approvals that may be required;
- Road closure requirements;
- Event-day responsibilities; and
- How to evaluate your event afterward.

This guide is a planning resource only. It does not replace legislation, municipal bylaws, permits, licenses, insurance requirements or direction from the City of Orillia or other regulatory authorities. When in doubt, contact the DOBIA office early in the planning process.

BEFORE YOU START

Before beginning detailed planning, establish the basic purpose and scope of your event.

Event Name: _____

Event Date: _____

Event Time: _____

Set-Up Time: _____ Take-Down Time: _____

Location(s): _____

Event Organizer: _____

Organization/Business: _____

Contact Information: _____

- Why are you holding the event?
- Who is the event for?
- What do you want visitors to experience?
- How will the event benefit Downtown Orillia

What makes the event different or valuable?

A clear purpose will help guide decisions about programming, marketing, budget and evaluation.

WORKING WITH DOBIA

Depending on the event, DOBIA may provide support through promotion, coordination, equipment, staff guidance, financial sponsorship or other resources. Events seeking significant DOBIA support should contact the DOBIA office as early as possible.

Events Requiring DOBIA Approval

- DOBIA involvement may require approval where an event:
- Requests financial support from DOBIA;
- Requests significant DOBIA staff or operational support;
- Requires use of DOBIA equipment or resources;
- Requires a downtown road closure involving DOBIA coordination;
- Is being organized directly by DOBIA; or
- Is otherwise being presented as a DOBIA-supported event.

DOBIA approval does not replace any City of Orillia permit, licence, insurance requirement or other regulatory approval.

EVENT WORKING GROUP

Events should have an event working group of at least three (3) people, including the event organizer. For a new event intended to become an annual event, a member of DOBIA staff or board director should participate in the first year where appropriate. The working group should establish clear responsibilities for:

- Event planning;
- Budget and financial management;
- Sponsorship;
- Marketing and communications;
- Volunteers;
- Vendors and activity providers;
- Safety;
- Permits and approvals;
- Event-day operations; and
- Post-event evaluation.

The event organizer remains responsible for overall planning and for submitting all required information and documentation.

EVENT APPLICATION

Events requesting DOBIA support should provide enough information for the DOBIA Board to assess the event and determine whether it aligns with DOBIA's mandate and interests.

See Appendix A for application and Appendix C for Budget and grant requests.
Applications are reviewed by the DOBIA Board through the applicable approval process.

DOBIA FUNDING REQUESTS
Requests for financial sponsorship from DOBIA must be submitted in writing to the MPS Committee and include an event budget. The final decision rests with the DOBIA Board.

DOBIA event guidelines recommend submitting funding requests at least 16 weeks (four months) before the event to allow sufficient time for consideration. Funding requests made after an event has taken place will not normally be considered.

Approval of a funding request is subject to the decision of the DOBIA Board and available resources. A request for funding does not mean automatic approval. A request for funding may be denied, partially approved or fully approved depending on the information received and budget constraints.

Every event shall be reviewed individually and annually, even if the event is annual.

PLANNING TIMELINE
The earlier planning begins, the more options you will have. Use the following schedule as a guide and adjust it to the event's complexity.

4–6 Months Before • Confirm event concept and objectives; • Confirm date and location; • Establish the working group; • Prepare preliminary budget; • Identify potential sponsors; • Determine if DOBIA support is needed; • Identify permits and approvals and road closures; • Begin insurance discussions; • Develop preliminary marketing plan.	*3–4 Months Before* • Submit DOBIA funding requests; • Submit applicable event applications; • Begin permit applications; • Confirm vendors and activity providers; • Develop safety plan; • Develop site plan; • Confirm equipment requirements; • Begin volunteer recruitment; • Confirm sponsorships.
1–2 Months Before • Confirm permits and approvals; • Collect required insurance certificates; • Finalize vendors and entertainment; • Finalize site plan; • Confirm volunteers and event-day responsibilities; • Confirm traffic and road closure arrangements; • Begin regular promotional activity; • Confirm emergency and weather procedures.	*1–2 Weeks Before* • Confirm all suppliers; • Confirm volunteers; • Confirm event-day contacts; • Confirm equipment delivery and set-up; • Confirm signage; • Confirm weather plan; • Confirm emergency contacts; • Confirm required documents are on site or accessible.

After the Event

- Complete financial reconciliation;
- Return DOBIA equipment;
- Record incidents or issues;
- Gather feedback;
- Measure attendance and other event metrics;
- Complete the event debrief;
- Identify recommendations for future events.

BUDGET AND FINANCIAL SUPPORT

A realistic event budget should identify all expected revenue and expenses. Some potential expenses may include:

- Entertainment;
- Equipment;
- Tents and structures;
- Security;
- First aid;
- Insurance;
- Permits;
- Traffic control;
- Advertising;
- Printing and signage;
- Décor;
- Prizes and giveaways;

SPONSORSHIP AND DONATIONS

Sponsors and donors can provide valuable financial or in-kind support.

Donations are cash or in-kind contributions that provide assistance to an event. Donations should be used for purposes consistent with the event. Remaining funds or items should be dealt with in accordance with the agreed arrangement and should not be used for personal gain.

Sponsorship is a mutually beneficial arrangement in which an external party provides cash or in-kind support in return for an agreed commercial or promotional benefit. Sponsors should not be solicited in a coercive manner. A prospective sponsor that declines a request should not be penalized or treated differently as a result.

Sponsors should not be given access to personal information held by DOBIA or event organizers unless legally authorized.

Recognition of DOBIA support should follow the agreed use of the DOBIA logo and promotional materials.

SAFETY PLAN

Every event should consider the health and safety of participants, volunteers, staff, businesses and the public. Depending on the event, a written Safety Plan may be required and can be found in Appendix D. Consider the following:

Fire Safety- Identify event-specific fire risks and how they will be managed.

- Cooking equipment;
- Propane;
- Generators;
- Temporary structures;
- Emergency access; and
- Fire extinguishers or other required equipment.

Weather- Develop a plan for:

- Extreme heat;
- High winds;
- Heavy rain;
- Lightning;
- Severe weather;
- Cancellation; and
- Relocation.

Identify who has authority to cancel or relocate the event and how that decision will be communicated.

Security- Consider:

- Crowd management;
- Security personnel;
- Lost children;
- Theft prevention;
- Conflict management;
- Emergency response; and
- Police involvement where required.

First Aid and Medical Response- Determine whether your event requires:

- A first aid station;
- Trained first aid personnel;
- Emergency medical services;
- Additional medical resources; or

- A designated emergency response procedure.

Communication- Establish how organizers, staff and volunteers will communicate during the event. Determine how emergency information will be communicated to the public.

*Traffic and Pedestrian Safety***-** Plan for safe movement of:

- Pedestrians;
- Vehicles;
- Cyclists;
- Delivery vehicles; and
- Emergency services.

Avoid bottlenecks and provide clear signage and barriers where required.

INSURANCE

Insurance requirements should be confirmed early in the planning process to protect organizers, volunteers, participants and the public against liability arising from injury or property damage.

Certificate of Insurance

Where required, a Certificate of Insurance must be provided to the DOBIA office at least 30 days before the event, unless another timeline is specified. The certificate must be issued by the insurer or its authorized representative.

Minimum Coverage

Existing DOBIA event requirements identify Commercial General Liability coverage of at least $2,000,000, subject to review by the City of Orillia. Depending on the nature and risk of the event, additional coverage may be required.

Vendors and Activity Providers

Event organizers should confirm that vendors, entertainers, contractors and other activity providers have appropriate insurance coverage where required. Where DOBIA requests additional insurance documentation, provide copies to the DOBIA office at least one week before the event.

PERMITS AND APPROVALS

Event organizers are responsible for identifying and obtaining all permits, licences and approvals that apply to their event.

DOBIA support does not replace required municipal or other regulatory approvals.

The information below is planning guidance only. Requirements, fees and timelines can change; confirm current requirements with the applicable authority before applying.

Road Closure Permit
Road closures require advance planning and approval. Downtown Orillia road closure applications should be made to the DOBIA Board through the event working group.

Road closure requests are submitted to City Council in January and applications should be completed as early as possible. In some circumstances, later submissions may be possible with at least 90 days' notice.

Road Closure Site Plan — A site plan should identify:

- Location and timing of the closure;
- Traffic control signs;
- Barricades;
- Tents;
- Stages;
- Generators;
- Security/Police presence where applicable;
- Emergency access.

The existing DOBIA guidance requires a minimum six-metre emergency access route through the centre of closed streets where applicable.

Traffic control persons are required at barricades and must be properly trained, equipped and positioned as required by applicable legislation and safety requirements.

DOBIA maintenance staff may assist with DOBIA traffic-control equipment such as barricades where that assistance has been arranged in advance.

Parade Permits
The City of Orillia requires a Parade Permit Application for parades, processions and public demonstrations. Municipal Code Chapter 538 is the applicable municipal authority and notes that paid-duty police officers may be required depending on the nature of the parade. The City of Orillia recommends submitting parade applications at least 60 days before the proposed event date. Event organizers should confirm current application requirements and fees directly with the City of Orillia.

Lottery Licenses
Some events may require a lottery licence. Examples include:

- Raffles;
- Break-open tickets;
- Nevada lotteries; and
- Bazaar lotteries.

Eligibility requirements vary by licence type. Event organizers should confirm eligibility, application requirements, timelines and fees before conducting any lottery. The existing guidance indicates that applications normally take approximately 2–3 weeks to process where complete documentation has been provided.

Temporary Structures
Temporary structures may require permits or approvals depending on their size, height, design and intended use. This may include:

- Stages;
- Tents;
- Platforms;
- Demountable structures; and
- Other temporary structures.

The existing city permitting process provide specific thresholds for when certain temporary stages and support structures require a building permit.

Confirm current requirements with the City of Orillia before ordering or installing a temporary structure.

Alcohol And Special Occasion Permits
If alcohol will be served or sold at an event, the event organizer is responsible for determining whether a Special Occasion Permit or other authorization is required. Event organizers should contact DOBIA before planning an alcohol-related event to confirm whether DOBIA support is available.

Confirm current requirements, fees and timelines directly with the Alcohol and Gaming Commission of Ontario (AGCO).

EVENT VENDORS AND ACTIVITY PROVIDERS
Maintain a list of all vendors, entertainers, contractors and activity providers. Depending on the activity, collect:

- Contact information;
- Insurance certificates;
- Contracts or agreements;
- Food-related approvals;
- Electrical requirements;
- Safety information;
- Licensing information; and
- Other required documentation.

The organizer is responsible for ensuring that all activity providers meet applicable requirements.

MARKETING AND PROMOTION

Develop a clear marketing strategy for before, during and after the event. Consider:

- Social media;
- Website listings;
- Posters;
- Digital advertising;
- Media releases;
- Business promotion;
- Event photography; and
- Post-event promotion.

Marketing should clearly communicate:

- Event name, date, time and location; cost, if applicable; accessibility, parking and transportation information; weather or cancellation information; and registration info.

Where DOBIA provides sponsorship or promotional support, recognition should be provided according to the agreed arrangement.

EVENT-DAY RESPONSIBILITIES

The event organizer should identify who is responsible for the event on the day of the event. At minimum, consider identifying:

- Event Organizer-Overall responsibility for the event.
- Event Manager-Coordinates event operations.
- Site Manager-Oversees the physical event site.
- Health and Safety Contact-Coordinates safety concerns and emergency procedures.
- Volunteer Coordinator-Coordinates volunteers and assignments.
- Media/Public Contact- Handles media and public communications.

The event organizer is responsible for ensuring appropriate arrangements are in place for the health, safety and welfare of contractors, volunteers and the public.

SET-UP AND TAKE-DOWN

Plan set-up and take-down before event day. Confirm:

- Equipment delivery times;
- Vendor arrival times;
- Road closure timing and barricade placement;
- Electrical connections;
- Tent and structure installation;
- Signage;
- Waste and recycling;
- Emergency access; and
- Equipment removal.

Do not remove traffic-control devices or barriers until it is safe to reopen the area.

EMERGENCY AND INCIDENT MANAGEMENT

When organizing or operating a festival, or outdoor event in Ontario, compliance with the Ontario Fire Code is mandatory (O.Reg. 213/07).

- Tent and vendor placement including promotional signage or any booths must maintain at least 1.2 meters/4 feet of completely clear physical space around a hydrant to allow firefighters to attach hoses.
- Banners hung across a street must have minimum 14 feet clearance at its lowest point to accommodate the Fire Department's aerial truck.

Establish a clear process for responding to incidents and emergencies. Depending on the event, this may include procedures for:

- Medical emergencies;
- Fire;
- Severe weather;
- Security incidents;
- Property damage;
- Traffic incidents;
- Power failure;
- Crowd concerns Missing children; and
- Event cancellation.

Emergency services should be contacted whenever required. Report serious incidents involving DOBIA property, staff, volunteers or significant DOBIA-supported events to the DOBIA office as soon as reasonably possible.

ACCESSIBILITY

Event organizers should plan for accessible participation. Consider:

- Seating;
- Parking;
- Service animals;
- Communication needs;

Event layouts should avoid unnecessarily creating barriers for people with mobility, vision, hearing or other accessibility needs.

WORKPLACE HARASSMENT AND VIOLENCE

Events supported by DOBIA must comply with applicable DOBIA workplace harassment and workplace violence requirements. Event organizers should ensure that staff, volunteers and working-group members understand their responsibilities and know how concerns are reported. A copy of the applicable DOBIA policy should be consulted where the event involves DOBIA staff, volunteers or working-group members.

EVENT EVALUATION AND DEBRIEF

Decide before the event how success will be measured. Possible measures include:

- Attendance: Number of attendees and participants; estimated repeat attendance.
- Business impact: Business participation, customer traffic, sales feedback, new-customer exposure and business satisfaction.
- Marketing: Social media reach and engagement, website traffic, media coverage and email engagement.
- Community impact: Community participation, partner participation, volunteer participation and public feedback.
- Financial: Revenue, expenses, sponsorships, DOBIA contribution and final surplus or deficit.

Overall: What worked? What did not? What should change? Should the event be repeated? Should DOBIA continue supporting it?

Debrief

A written debrief may be required following an event supported by DOBIA. It should summarize the event, results, issues and recommendations, including:

- Summary of the event;
- Attendance;
- Financial results;
- Completed activities;
- Marketing results;
- Business/community feedback;
- Safety or operational issues;
- Unexpected challenges;
- Lessons learned; and
- Recommendations for the future.

Use the debrief to assess outcomes, issues, risks, lessons learned and the final budget. A sample debrief can be found in Appendix E.

IMPORTANT NOTICE

This Event Planner is a planning resource and does not replace professional advice, legislation, municipal bylaws, permits, licences, insurance requirements or direction from the applicable regulatory authority. Requirements, fees and contact information may change; confirm current information with the appropriate authority. Event organizers are responsible for confirming the requirements that apply to their event and obtaining all required approvals. DOBIA approval or support does not constitute approval by the City of Orillia or any other regulatory authority.

APPENDIX A: EVENT ORGANIZER CHECKLIST

Initial Planning

- □ Define the purpose of the event.
- □ Identify the target audience.
- □ Confirm date and location.
- □ Establish an event working group.
- □ Determine whether DOBIA support is required.
- □ Prepare a preliminary budget.
- □ Identify required permits and approvals.
- □ Determine whether a road closure is required.
- □ Identify insurance requirements.

DOBIA

- □ Contact DOBIA office.
- □ Submit event application, where required.
- □ Submit funding request, where applicable.
- □ Confirm DOBIA support and conditions.
- □ Confirm use of DOBIA equipment or staff.
- □ Confirm promotional arrangements.

Safety

- □ Complete safety plan
- □ Confirm emergency access.
- □ Confirm weather plan.
- □ Confirm first aid/medical arrangements.
- □ Confirm security requirements.
- □ Confirm traffic and pedestrian management.

Permits and Insurance

- □ Road closure approval.
- □ Check additional permits where applicable.
- □ Insurance certificate.
- □ Vendor/activity-provider insurance.
- □ Other applicable permits.

Event Week

- □ Confirm event staff and volunteer assignments.
- □ Confirm emergency contacts.
- □ Confirm equipment.
- □ Confirm signage.
- □ Confirm vendor arrival times.
- □ Confirm road closure/set-up schedule.
- □ Confirm accessibility arrangements.
- □ Confirm weather decision process.
- □ Ensure emergency access is maintained.
- □ Document any incidents.

After the Event

- □ Complete financial reconciliation.
- □ Return DOBIA equipment.
- □ Gather business/community feedback.
- □ Review attendance and metrics.
- □ Complete event debrief.
- □ Identify recommendations for next year

SUPPORTING DOBIA DOCUMENTS

The following documents may be provided by DOBIA as part of the event-planning process:

- Event Application;
- Event Budget Template;
- Event Safety Plan;
- Event Debrief and Evaluation Form; and
- Other event-specific forms or procedures.

APPENDIX B: EVENT APPLICATION

Section 1: Event Information

Event Name: _____ Event Organizer(s):
Event Date(s): _____ Estimated Attendance:

Purpose of Event:

What do you hope to achieve? Do you want to accomplish a specific goal?

_____
_____
_____

Strategic Plan

Identify your target audience and their needs. How will your event stand out from competition?

_____
_____
_____

Event Benefits & Value

What does your event offer as unique value:

_____
_____
_____

Metrics

In addition to metrics for tracking the effectiveness of your campaigns, identify any other key metrics that you'll use to evaluate the event.

Social Media and Advertising Strategy:

_____
_____
_____
_____

Working Group Members (minimum 3 required):

Name	Organization/Business	Role

APPENDIX C: EVENT BUDGET

Master Budget:

ACTIVATION PLAN		PROJECTED COST	ACTUAL COST	PRIME
DÉCOR		$	$	
		$	$	
		$	$	
		$	$	
		$	$	
EQUIPMENT		$	$	
		$	$	
		$	$	
		$	$	
		$	$	
ENTERTAINMENT/ ACTIVATIONS		$	$	
		$	$	
		$	$	
		$	$	
		$	$	
		$	$	
VOLUNTEERS		$	$	
		$	$	
		$	$	
PERMITS/PARKING		$	$	
		$	$	
		$	$	
GIVEAWAYS / PRIZES		$	$	
		$	$	
		$	$	
MEDIA, ADVERTISING, PRINT		$	$	
		$	$	
		$	$	
		$	$	
TOTAL COSTS		$	$	

Activation Budget:

	NAME/DESCRIPTION	ITEM/AMOUNT	COLLECTION DATE	COLLECTED
		TOTAL ACTIVATION BUDGET		

	DESCRIPTION	ITEMS NEEDED	DUE DATE	EST. COST	ACTUAL COST
			TOTAL ACTIVATION COST		

DOBIA FUNDING REQUEST

Are you requesting grant funding? Yes / No
Amount Requested: $
Total Event Budget: $
Grant Purpose:

_____

_____

_____

All grant-funded purchases must be administered using one of the following methods:

1. Direct Purchase by DOBIA
2. Reimbursement to Event Organizer
    - Purchases must be pre-approved by DOBIA.
    - Itemized receipts must be submitted.
    - Reimbursement will only occur after event completion and documentation review.

DOBIA reserves the right to deny reimbursement for unapproved or undocumented expenses.

Applicant Agreement
I certify that the information provided is accurate. I agree to obtain required permits and insurance and to comply with all DOBIA policies.

Financial Compliance Agreement:

I understand that all grant-funded purchases must either be made directly by DOBIA or reimbursed only upon submission of original receipts and prior approval. I agree to comply with DOBIA financial control and reimbursement policies.

Applicant Name: _____ Signature: _____

Date: _____

APPENDIX D: SAFETY PLAN

ORGANISER RESPONSIBILITIES

As an Event Organizer you are responsible for:

- Informing your local authority of your event
- Submitting relevant documentation to local authorities in a timely manner
- Overall safety at your event as far as reasonably practicable
- Health and safety arrangements are in place to control risks
- Ensuring competence of staff at your event to undertake their roles safely
- Checking all insurance documents for vendors etc. (these documents may also be requested by your local authority)
- Health, Safety and Welfare of all contractors and members of the public attending your event.

DISCLAIMER

This template is a guide only. It does not necessarily include all the information that may be relevant to your event. The DOBIA is not responsible for any lack of information not submitted with this safety plan.

PRIVACY

Your personal information is required for administration purposes. Your local authority is committed to protecting your privacy and fulfilling its obligations under Municipal Privacy Protection laws. The DOBIA may use this data in order to inform you of its activities and/or improve its programs in relation to the subject matter only, but will not sell, rent, distribute or otherwise make your data commercially available to any third party, unless it is required to by a court order or to comply with other legal requirements.

ROLES AND RESPONSIBILITIES ON EVENT DAY(S)

Please provide a brief description of the roles of event staff and their main responsibilities. There may be other roles that are not listed here that are applicable to your event.

Event Organizer: _____

Event Manager:_____

Site Manager: _____

Health & Safety Officer: _____

Press Contact/Other: _____

SECURITY

Detail plans to coordinate with local police, hire security if needed, plan for lost children, theft prevention, and conflict de-escalation.

FIRE SAFETY
Please ensure that you have considered aspects related to fire safety at your event and detail here:

_____

_____

_____

_____

WEATHER PLAN
Detail your plan for inclement weather. This should include how cancellation or relocation plans are determined and communicated to participants and visitors.

_____

_____

_____

_____

ELECTRICAL, POWER AND GAS SUPPLY TO GENERATORS
Will your event require power or generators? How will it be supplied? How will you ensure the safe use and placement of cords and generators? Will you need sound mitigation measures?

_____

_____

_____

_____

MEDICAL AND FIRST AID
Will you be arranging for first aid stations, trained staff/volunteers, and communication with local emergency services.

_____

_____

COMMUNICATION WITH THE PUBLIC
How will you communicate with organizers. staff and volunteers during the event. How will you provide clear public messaging for updates and emergencies.

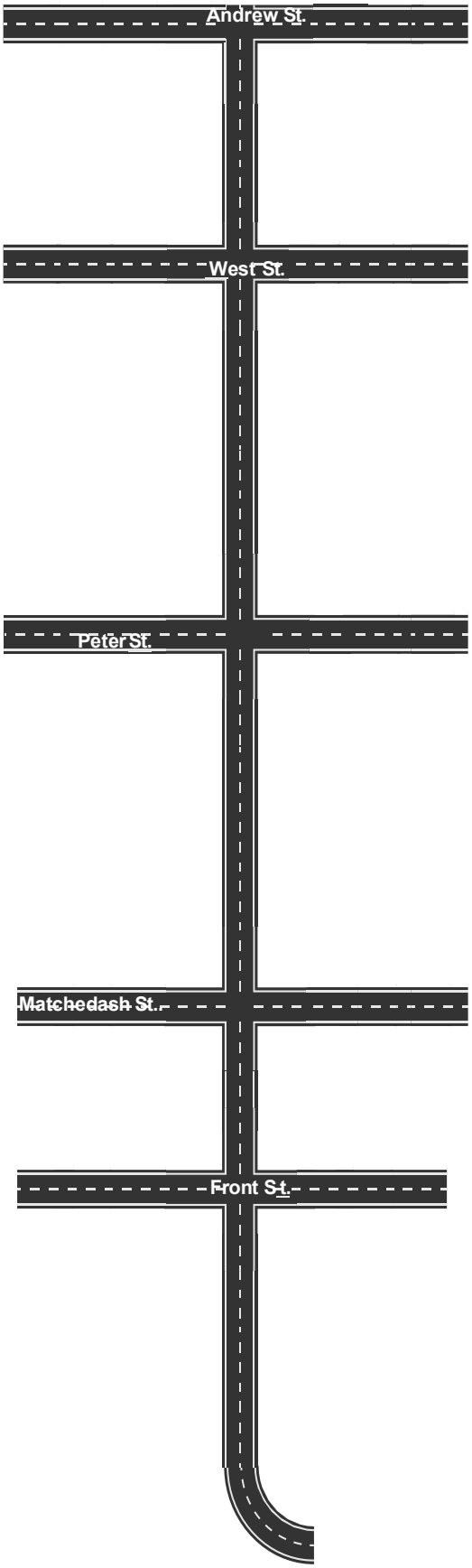
_____

_____

_____

_____

TRAFFIC MANAGEMENT



For Pedestrians- Plan for safe pedestrian flow, avoid bottlenecks, and provide clear signage and barriers where needed.

For Road Traffic- Develop detour routes, communicate closures early, and manage parking and delivery access.

_____

_____

_____

Closure time from: _____

_____

_____

_____

On the map please show:

Placement of traffic control signs, barricades etc.

Items that will be placed on the road within the area of the closure including their dimensions where possible.

Location of police officer(s) and/or security personnel if needed

Notes and Explanations:

_____

_____

_____

_____

_____

_____

APPENDIX E: DEBRIEF

PROJECT TITLE

Team	DATE PREPARED

PROJECT OVERVIEW

What were the original goals and objectives of the project?
What were the original criteria for project success?
Was the project completed according to the original expectation?

PROJECT HIGHLIGHTS

What were the major accomplishments?
What methods worked well?
What did you find to be particularly useful for accomplishing the project?

PROJECT CHALLENGES

What elements of the project went wrong?
What specific processes need improvement?
List any technical challenges.

POST-PROJECT TASKS / FUTURE CONSIDERATIONS

List any continuing development and maintenance objectives.