

## Checklist: Planning a Workplace Holiday Party

As the holiday season approaches, many employers plan to host an annual holiday party. A well-executed party is a fun way to celebrate a challenging work year, foster team spirit and boost employee engagement. However, there is also a significant level of risk associated with workplace parties, such as allegations of misconduct or lack of inclusivity. Thorough consideration is crucial to ensure workplace holiday parties remain safe and stress-free for all. This checklist provides an overview of key activities and steps to consider when planning a workplace holiday party. For assistance in developing specific workplace policies, employers should seek local legal counsel.

### Planning

Planning for a holiday party can be challenging. A combination of accountability, creativity and organization is necessary to create an unforgettable workplace party. The planning stage is also crucial to ensure that organizations stay within budget and avoid potential liabilities. Because organizational needs differ based on size, workforce demographics and other factors, the steps in these lists should be modified to meet the unique needs of an organization.

Planning	Completed
Designate an individual responsible for planning the party (e.g., an HR employee, an employee volunteer or an outside planning specialist).	<input type="checkbox"/>
Decide which type of gathering will best suit organizational needs. The following are common types of workplace parties: <ul style="list-style-type: none"> <li>• Virtual</li> <li>• At-work</li> <li>• After-hours</li> <li>• Off-site group activity</li> </ul>	<input type="checkbox"/>
Determine who will be invited to the holiday party (e.g., all employees, employees' partners, clients or vendors).	<input type="checkbox"/>
Consider making the event family-friendly. Although this may not be appropriate for all corporate events, this can show employees their employer cares and supports them as their full selves in and out of work.	<input type="checkbox"/>
Survey employees to find a date and time that works for the majority of individuals. Be mindful of potential conflicts with work obligations and other cultural holidays when selecting a date.	<input type="checkbox"/>

<p>Create a budget to encompass all holiday party costs, including the following:</p> <ul style="list-style-type: none"> <li>• Venue</li> <li>• Food</li> <li>• Drinks</li> <li>• Entertainment</li> <li>• Gifts</li> <li>• Transportation</li> </ul>	<input type="checkbox"/>
<p>Pick a party theme to engage employees (e.g., gingerbread decorating or ugly sweaters).</p>	<input type="checkbox"/>
<p>Select a venue that's easy to travel to and navigate. Other factors that may affect your choice of venue include the following:</p> <ul style="list-style-type: none"> <li>• Availability</li> <li>• Budget</li> <li>• Attendance</li> <li>• Entertainment</li> </ul>	<input type="checkbox"/>
<p>Plan transportation and parking to ensure employees can get to and from the event easily. Employers have a variety of transportation options to choose from, including:</p> <ul style="list-style-type: none"> <li>• Local taxis</li> <li>• A transportation vendor</li> <li>• Ride-sharing services, such as Uber or Lyft</li> </ul>	<input type="checkbox"/>
<p>Consider hosting friendly competitions (e.g., trivia or a scavenger hunt).</p>	<input type="checkbox"/>
<p>Integrate management and senior leadership into the celebration.</p>	<input type="checkbox"/>
<p>Encourage employees to get to know co-workers from different teams and departments.</p>	<input type="checkbox"/>
<p>Incorporate inclusive practices into your party planning. This may include the following:</p> <ul style="list-style-type: none"> <li>• Use neutral decor and themes.</li> <li>• Avoid over-decorating for one specific religion or culture.</li> <li>• Be aware of certain placement details if using cultural or religious decor (e.g., menorahs are traditionally placed near windows).</li> <li>• Incorporate colors from other cultures' festivities.</li> </ul>	<input type="checkbox"/>

<ul style="list-style-type: none"> <li>• Offer diverse holiday-themed activities and cuisines.</li> <li>• Ask for employee feedback on the menu before it's finalized.</li> <li>• Celebrate the "holiday season" rather than a particular holiday.</li> </ul>	
Consider supporting employees' health and wellness preferences by offering nonalcoholic beverages and foods that accommodate different diets and restrictions. It may be beneficial to survey employees about dietary preferences ahead of time.	<input type="checkbox"/>
Incorporate employee recognition with thoughtful gifts, awards or acknowledgment.	<input type="checkbox"/>
Distribute invitations well in advance. These invitations can be distributed by email, mail or in person.	<input type="checkbox"/>
Use an online poll or form to gather RSVPs.	<input type="checkbox"/>
Advise employees on expectations for behaving responsibly. This may include circulating a written reminder of employer policies regarding drinking in moderation, appropriate dress and behavior, and avoiding driving after drinking.	<input type="checkbox"/>
Ensure management understands their responsibility to lead by example with moderate alcohol consumption and appropriate behavior.	<input type="checkbox"/>

Significant effort goes into planning and hosting a holiday party that stays within budget and avoids liabilities. Employers have to make many important decisions regarding food, venue, location and activities that will impact the success of the event. Consider the following best practices for throwing a successful workplace holiday party.

Best Practices	Completed
<p>Ensure your employee handbook is up to date regarding acceptable workplace behaviors, such as the following:</p> <ul style="list-style-type: none"> <li>• Anti-discrimination, harassment, sexual harassment and retaliation policies</li> <li>• Dress code</li> <li>• Code of ethics</li> <li>• Standards of conduct policy</li> <li>• Social functions policies</li> <li>• Disciplinary action policy</li> <li>• Employee fraternization policy</li> <li>• Safety policy</li> </ul>	<input type="checkbox"/>

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<ul style="list-style-type: none"> <li>• Religious observance policy</li> <li>• Violence in the workplace policy</li> <li>• Workplace bullying policy</li> <li>• Workplace drug and testing policy</li> <li>• Drug and alcohol policy</li> <li>• Social media policy</li> </ul>	
Distribute relevant workplace policies to employees prior to the event and state consequences for inappropriate behavior, like overt drunkenness.	<input type="checkbox"/>
Remind employees that normal workplace policies will be enforced at the event, and employees will be expected to abide by those policies.	<input type="checkbox"/>
Keep the holiday focus general to avoid excluding employees of different religions or cultural backgrounds.	<input type="checkbox"/>
Avoid direct gift exchanges, as employees may express dislike for one another with inappropriate or offensive “gifts.” Consider indirect exchanges, where everyone brings an unmarked gift.	<input type="checkbox"/>
Set clear monetary limits and guidelines for appropriate gifts, and don’t pressure employees to participate in exchanges.	<input type="checkbox"/>
Consider not serving alcohol at the party. While this may disappoint some employees, it can also significantly reduce the risk of misconduct.	<input type="checkbox"/>
<p>If alcohol will be served, use practices to limit or reduce the consumption of alcohol, such as:</p> <ul style="list-style-type: none"> <li>• Offer drink tickets (with a maximum limit).</li> <li>• Offer low-alcohol-content beverages, like beer and cider.</li> </ul>	<input type="checkbox"/>
Pay for employees’ transportation home if alcohol is being served.	<input type="checkbox"/>
Ask for employee feedback. If holiday parties are intended to boost morale, it’s important that employers know what employees want. For example, would they prefer an at-work holiday lunch and a gift card to a party?	<input type="checkbox"/>

Holiday parties allow co-workers to intermingle and get to know each other outside their typical work environment. However, they also have the potential to cause religious or cultural friction among employees, and alcohol consumption can lead to inappropriate behavior, harassment or claims of misconduct. Review the following checklist to ensure that holiday parties don’t contribute to allegations of misconduct or harassment.

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Limiting Liability	Completed
Several federal, state and local laws prohibit sexual harassment, discrimination and retaliation and require employers to accommodate employees' religious beliefs.	<input type="checkbox"/>
Employers should avoid religious imagery or themes to avoid discriminating or excluding employees of diverse backgrounds.	<input type="checkbox"/>
Work with legal counsel to review workplace policies.	<input type="checkbox"/>
Assemble a planning committee with employees to plan the event and effectively evaluate potential risks.	<input type="checkbox"/>
Mention taking action to limit the potential of accidents or physical injuries during the event.	<input type="checkbox"/>
Make holiday parties optional. Typically, if a workplace function is mandatory, employees must be compensated for their time. Additionally, requiring employee attendance can compound employer liability if misconduct occurs.	<input type="checkbox"/>
Host the party at an off-site location to reduce workplace property risks.	<input type="checkbox"/>
Consider the risks of serving alcohol and make a conscious and informed decision before doing so.	<input type="checkbox"/>
Consider hiring a professional bartender to serve alcohol.	<input type="checkbox"/>
If alcohol will be served, limit the hours that beverages will be served and provide food to reduce the impact of consumption.	<input type="checkbox"/>
Close the bar or alcohol service hours before the party ends.	<input type="checkbox"/>
Provide transportation for all employees to and from the event.	<input type="checkbox"/>

Use this checklist as a starting point for planning a successful workplace holiday party. For more workplace resources, contact Tilson HR today.