**PRE-EVENT PLANNING CHECKLIST**

**Thank you for choosing to support Osler Foundation!**

This is a pre-event checklist to help you hit all the milestones in planning and fulfilling your event.

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| **At Least 3 Months Before** |
| [ ]  | Brainstorm and decide what kind of event you are organizing. Choose a theme if appropriate. |
| [ ]  | Organize an event planning committee if needed. |
| [ ]  | Draft your budget and set a fundraising goal that is attainable. |
| [ ]  | Set a date. Check to see if your preferred venue(s) are available for this date. |
| [ ]  | Book the venue. |
| [ ]  | Book any equipment. |
| [ ]  | Decide on what suppliers you need to make your event successful. Consider entertainment, food, decor, audio visual, and printing. |
| [ ]  | Decide on (and order if necessary) any food that is required. |
| [ ]  | Solicit sponsors if required. |
| [ ]  | Decide if you need any volunteers on the day of your event. If so, how many? Recruit them now. |
| [ ]  | Prepare promotional materials like flyers and posters. Ask your Foundation representative for help. |
| [ ]  | Complete and submit your Event Proposal Form to your Foundation representative. |
| [ ]  | Apply for a liquor license/lottery license if required. |
| [ ]  | Choose and Invite speakers. |
| [ ]  | Send out invitations if required. Send your event information to all of your contacts. |

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| **1 Month Before** |
| [ ]  | Keep track of your event guests/participants, number of tickets sold, sponsors, etc. |
| [ ]  | Submit event details to local events calendars and local media. |

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| **Weeks Before** |
| [ ]  | Create a final list of volunteers and determine their day-of duties. Send out a reminder. |
| [ ]  | Confirm event information with all suppliers. |
| [ ]  | Contact local media to attend the event. |

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| **Day of Your Event** |
| [ ]  | Meet with your committee and volunteers before the event starts to make sure everyone knows their roles/duties. |
| [ ]  | Set up for the event. |
| [ ]  | Fill out Pledge Forms. |
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| [ ]  | HAVE FUN! |
| [ ]  | Take plenty of pictures. |
| [ ]  | Thank everyone for their help. |
| [ ]  | Collect funds and financial/donor information in a secure place. |
| [ ]  | After Your Event |
| [ ]  | Tally your finances and determine the total donation amount. Use our Post-Event Checklist. |
| [ ]  | Call Osler Foundation at 905-494-6556 or 416-747-3388 to make arrangements to submit funds within 30 days and set a date for a cheque presentation. Don’t forget to send us your event pictures! |
| [ ]  | Send thank you letters to participants, sponsors and volunteers. |
| [ ]  | Evaluate the success of your event and document any changes you would make next year. |
| [ ]  | Begin planning for your event next year! |
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