



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.

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.

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.

2 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.

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.
- ☐ 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!