

# Fundraising Event Planning Template

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A strategic and operational framework for nonprofits.

Kindsight





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This fundraising event planning template is a complete system designed to help nonprofits plan events that are strategically aligned, operationally sound, and focused on long-term fundraising success. It can be used for events of any size, from small donor gatherings to large-scale walks and galas.

A template helps to streamline your planning process, increase consistency between events, and promote internal transparency. Use it to:

- Define the purpose of your event
- Set realistic fundraising and engagement goals
- Coordinate logistics with confidence
- Provide real-time updates to organizational and board leadership
- Deliver a professional donor experience
- Strengthen post-event stewardship and reporting

**Note:** This template is an extension of the Kindsight blog, [Drive strategic results with this fundraising event planning template.](#)

## Section 1: Event strategy

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This section ensures your event supports and aligns with your organization's broader fundraising objectives.

### Event overview

- Event name
- Event date and time
- Event location or platform
- Event format (gala, peer-to-peer, luncheon, virtual, etc.)
- Primary purpose (fundraising, cultivation, stewardship, education)

### Event objectives and goals

- Primary event goal
- Gross fundraising goal
- Net income goal
- Engagement goals (attendance, upgrades, new donors)



- Secondary objectives (stewardship touchpoints, prospect qualification, community education and awareness)

## Target audience

- Priority invite list segments:
  - Major donors
  - Mid-level donors
  - Lapsed donors
  - New prospects
  - Sponsors / corporate partners
  - Community partners / VIPs
  - General (everyone)
- Total invitation count
- Registration/RSVP target

## Budget planning

- Projected expenses
- Revenue streams:
  - Tickets
  - Sponsorship
  - Pre-event donations
  - Live appeal
  - Auction (silent or live)
  - Matching gifts
- Contingency funds & approval process

## Sponsorship strategy

- Sponsorship levels and benefits
- Target sponsor prospect list
- Outreach tracking
- Deliverables tracking:
  - Logo files
  - Placements (signage, program, or verbal)



## Section 2: Planning and ownership

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This section focuses on timelines, ownership, and communication.

### Roles and responsibilities

- Event owner
- Lead by area:
  - Development
  - Operations/logistics
  - Marketing
  - Sponsorship
  - Volunteers

### Timeline and milestones

- Planning start date
- Marketing and outreach milestones
- Sponsorship deadlines
- Registration launch
- Final preparation checkpoints

### Marketing and promotion

- Core messaging and positioning
- Channels:
  - Email
  - Social
  - Direct outreach
  - Media campaigns
  - Community outreach
  - Event website
  - Other
- Key dates and milestones



## Section 3: Logistics

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This section provides the operational backbone for planning your event, ensuring a smooth experience for staff, volunteers, and attendees alike.

### Venue and space planning

- Venue details and contacts
- Contract terms and deadlines
- Capacity and layout
- Accessibility considerations
- Setup and breakdown times

### Vendor management

- Vendor needs:
  - Catering
  - Audio-visual and production
  - Rentals
  - Photography/videography
  - Décor and signage
- Vendor name, contacts, and responsibilities
- Contracts and agreements

### Registration and guest flow

- Registration platform
- Check-in process
- Walk-up registration plan
- Guest flow and seating

### Run of show

- Minute-by-minute event schedule
- Speakers and transitions
- Fundraising moments

### Donation infrastructure

- Giving methods (QR, text-to-give, live appeal, cash/check)
- Event-specific donation links



- Technology requirements
- Backup giving plans

## Staff and volunteer coordination

- Volunteer needs before, during, and after event
- Volunteer expectations:
  - Roles
  - Arrival times
  - Dress code
- Communication plan
- On-site leadership

## Supplies and materials

- Signage
- Programs
- Donation instructions
- Technology and power needs
- Miscellaneous supplies (pens, tape, etc.)

## Contingency planning

- Weather plan
- Medical emergencies
- Technology failures
- Staffing backups

## Breakdown and closeout

- Vendor payment departures
- Equipment returns
- Venue walkthrough
- Financial closeout



## Section 4: Post-event follow-up and evaluation

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This section ensures your event creates lasting impact.

### Gift processing and reconciliation

- Donation reconciliation
- CRM entry
- Receipt and acknowledgment timing

### Stewardship and follow-up

- Stewardship outreach by status (attendee vs. donor, donation level)
- Sponsor thank yous and reporting
- Donor and attendee follow-up assignments
- Board and leadership outreach

### Event evaluation

- Total and net revenue
- Attendance and conversion rates
- Sponsorship fulfillment
- Lessons learned and recommendations for next year

### Final Reminder

Fundraising events are strategic investments. Their success depends not only on what happens in the room, but on how well they are planned, executed, and followed up. This fundraising event planning template is designed to help your organization protect that investment, both today and for future events.

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## About Kindsight

Kindsight builds technology that helps fundraisers make a difference. Founded on over three decades of innovation, and trusted by over 4,500 organizations worldwide, Kindsight is the market leader in advancement and fundraising software, supporting the education, healthcare, and nonprofit sectors to achieve their goals through smarter, more connected fundraising. Natively built upon the Salesforce architecture, Kindsight's Fundraising Platform is anchored in the strength and flexibility of the Ascend CRM, powered by the trusted insights of iWave data, and unified by seamless workflows and connected data. Kindsight helps organizations discover the right donors, inspire personal connections at scale, and grow giving year after year. With industry-leading prospect research solutions, award-winning fundraising CRMs, a dynamic constituent portal, and an AI assistant built for modern fundraising, Kindsight's product suite is truly changing the game for donor fundraising.

Connect your story to donors who care about your cause—at any scale, in real time—that's the power of Kindsight.

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