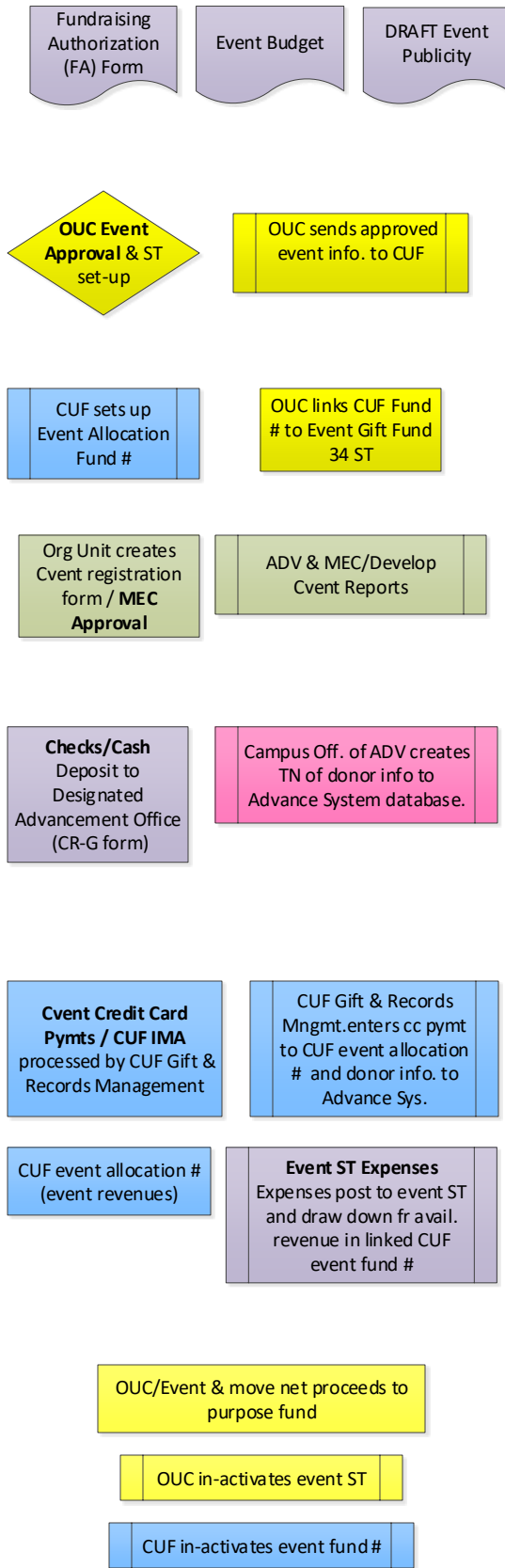


Fundraising Events / Cvent Procedures



Event set-up

- Org Units submit **FA form** (all campus approvals), **budget, publicity** to OUC for event approval
- Publicity must include **FMV info., Net proceeds statement** (donor intent) identifying CUF Tax ID # 84-6049811 & checks payable to CUF
- Net proceeds – Identify **CUF fund # for net proceeds**
- **OUC Fundraising Events & Gift Compliance** - event approval; activates/re-activates event
- **OUC Fundraising Events & Gift Compliance** sends event publicity & FMV chart info. to **CUF Accounting** for event allocation # & **CUF Gift Processing & Records Management** for gift tax receipting documentation
- CUF sets up Event Fund # (to be linked to the Event Gift Fund 34 ST and both temporary)
- **OUC Fundraising Events & Gift Compliance** – Request OUC Accounting Services to link CUF Fund # to Gift Fund 34 ST
- **OUC Fundr. Evts** notifies Org Unit and **ADV/MEC** of CUF Event fund # to use on Cvent registration form payment path set-up
- **ADV/MEC** applies applicable CUF Event fund # to Cvent registration form; Org Unit Cvent user needs **MEC Approval** to activate form in Cvent
- MEC and Org Unit develop Cvent reports/donor info required for Org Unit & CUF Gift & Records Management Office (for gift tax receipts)

Revenue path

- All **checks/cash** deposited to your **campus Designated Advancement Office**
- All checks/cash deposits must use the **Cash Receipt – Gifts (CR-G) form**
- Designated campus ADV Office will create the Transmittal Note (TN), alerting CUF Gift & Records Management of deposit
- **CUF** – Daily courier pick up of checks/cash for UCB, UCD Downtown, Anschutz and 2x/week for UCCS.
- **CUF Accounting & CUF Gift & Records Mngmt.** will access event Cvent reports to use in reconciling deposits & gift tax receipting.
- **CUF Gift & Records Management** will issue gift tax receipts for check/cash deposits
- **Credit Cards** – All registrations processed through Cvent will be directed to the CUF Event fund #, donor info. entered in Advance, and gift tax receipted by the CUF.
- **Cvent Report** - event info available online to Org Unit, OUC, CUF Gift & Records, and CUF Accounting
- All event revenues deposit to the CUF event fund #, linked to the event ST
- All event expenses post to the event ST.
- Event expenses will draw down from available revenue balance in CUF event fund #
- Org Unit staff responsible for monitoring event revenues in CUF Financial Edge Reporting System, and event expenses in CU's Finance & Cognos Reporting System.

Event closeout

- When event activity has completed, OUC will instruct CUF to move net proceeds to fundraising purpose fund #.
- OUC will in-activate the Event ST; CUF will in-activate the Event fund #.

Org Color Key:

