Creating Fundraising Events [1]

March 6, 2019 by jennifer.mortensen [2]

Creating fundraising events in Cvent can be complicated. Even if you've created hundreds of Cvent events previously and are an expert user, there are specific requirements you must follow in order to build and launch a fundraising event. Why the difference? Fundraising events involve multiple CU departments including your own, System Advancement, the CU Foundation, and the Office of the University Controller. You'll work together with representatives from these teams to ensure that you meet requirements associated with tax deductibility, fair market value, and gift reporting. It's worth learning about the steps required in advance to save you time (and to save your event attendees confusion) before you get started.

Start Early to Ensure Success

Given the complexity of configuring fundraising events in Cvent and the number of teams involved, be sure to start planning **AT LEAST THREE TO FOUR WEEKS** before you plan to launch your registration form to ensure success.

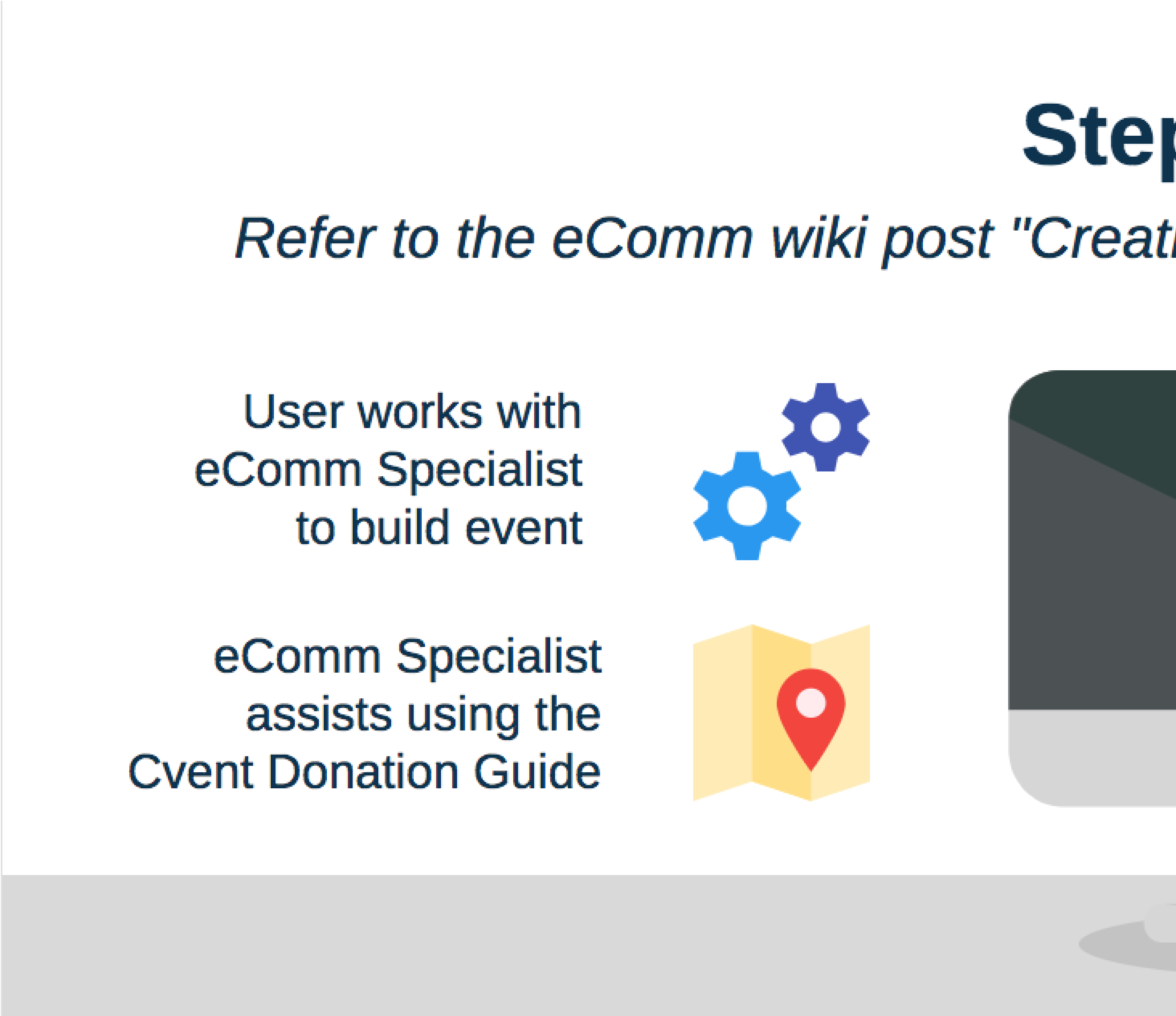
We've created an info sheet [3] that outlines the basics of each step in the process. We're also including context for each of those steps below to help you understand what they mean and why they are so important to follow.

Step 1: Connect

- Connect Early
- eComm Specialist
- System Advancement
- Office of the University Controller

Connect early to maximize shared knowledge. Begin working your way through these steps **AT LEAST THREE TO FOUR WEEKS** before you plan to launch your fundraising event in Cvent. This will give you time to connect with the parties involved throughout CU and ensure that you have addressed all of the required elements in the planning process. Connecting with the right people now will save you time later.
Notify your eComm Specialist that you will be hosting a fundraising event. As soon as you know you'll be hosting a fundraising event, inform your eComm Specialist so that he or she can make the appropriate introductions across CU.
Your eComm Specialist will connect you with the System Advancement team and will introduce you to Caroline Fetterolf, an Advancement eComm Specialist. While you'll be working with your own eComm Specialist to build the event, Caroline will verify that your event is configured correctly based on the Advancement requirements you'll read about below.
Your eComm Specialist will connect you with the Office of the University Controller and will introduce you to Karen Ichiba. Each fundraising event at CU is assigned a specific allocation code at the CU Foundation for revenue collection purposes. Karen will ensure that you have and that you are using the correct allocation code and will walk you through the steps of which you should be aware for tax purposes, such as fair market value and event proceeds language that is required in your marketing materials.

Step 2: Build



OPTIONAL DONATIONS: Only designated Cvent fundraising event forms are permitted to collect optional donations. Event planners hosting non-fundraising events who want to encourage optional donations from event registrants should provide a link to the associated fund page on the CU Foundation giving site [4].

- Build your Event
- Cvent Donation Guide
- Request Allocation Code
- Receive Allocation Code

Work with your eComm Specialist to build your fundraising event in Cvent. Many of the event elements you'll be using will be the same as normal, but you'll also want to pay special attention to the Cvent Donation Guide [3] referenced in tab two.

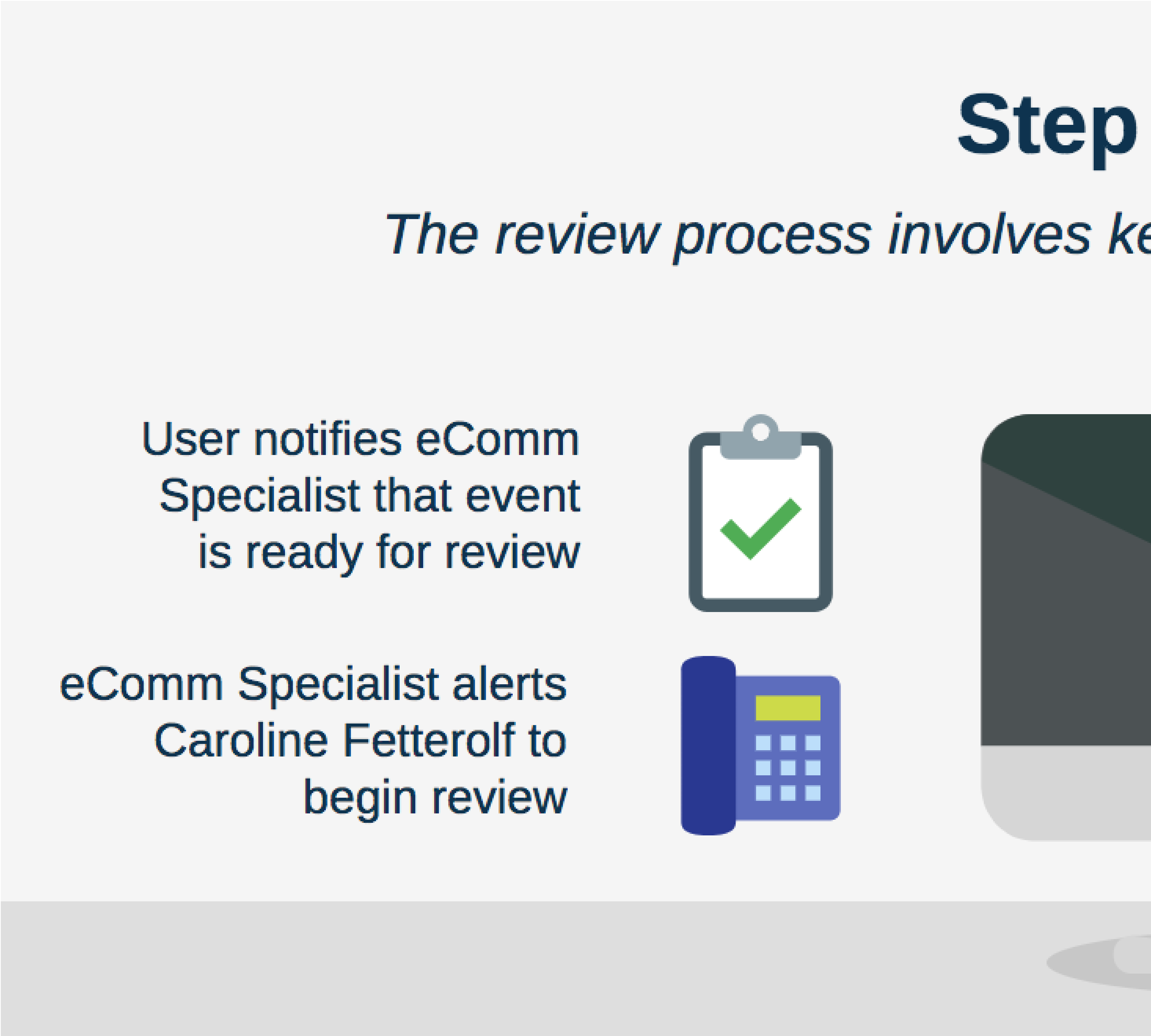
NEW: When creating your registration form, you are required to include a registration question regarding gift receipts for companies and where gift credit should be issued. Once the question has been added, it needs to be marked as required. This allows the CU Foundation to determine who receives credit for the donation (for example, a company rather than an individual). Details are available in the Cvent Donation Guide [3].

Use the Cvent Donation Guide [3] to ensure that you are configuring your event correctly. This detailed guide will walk you through the specific Cvent configurations of which you need to be aware to be compliant with System Advancement and University Controller requirements for fundraising events and tax deductibility.

If needed, contact your eComm Specialist to request that your event's allocation code be added to Cvent. If you've hosted the same fundraising event before, your allocation code may already be present in Cvent, so be sure to double check before you request that it be added.

Your eComm Specialist will ensure that the allocation code is created. If the allocation code does not already exist in Cvent, the CU System eComm team will add it. When complete, your eComm Specialist will notify you that the allocation code is available in Cvent.

Step 3: Review

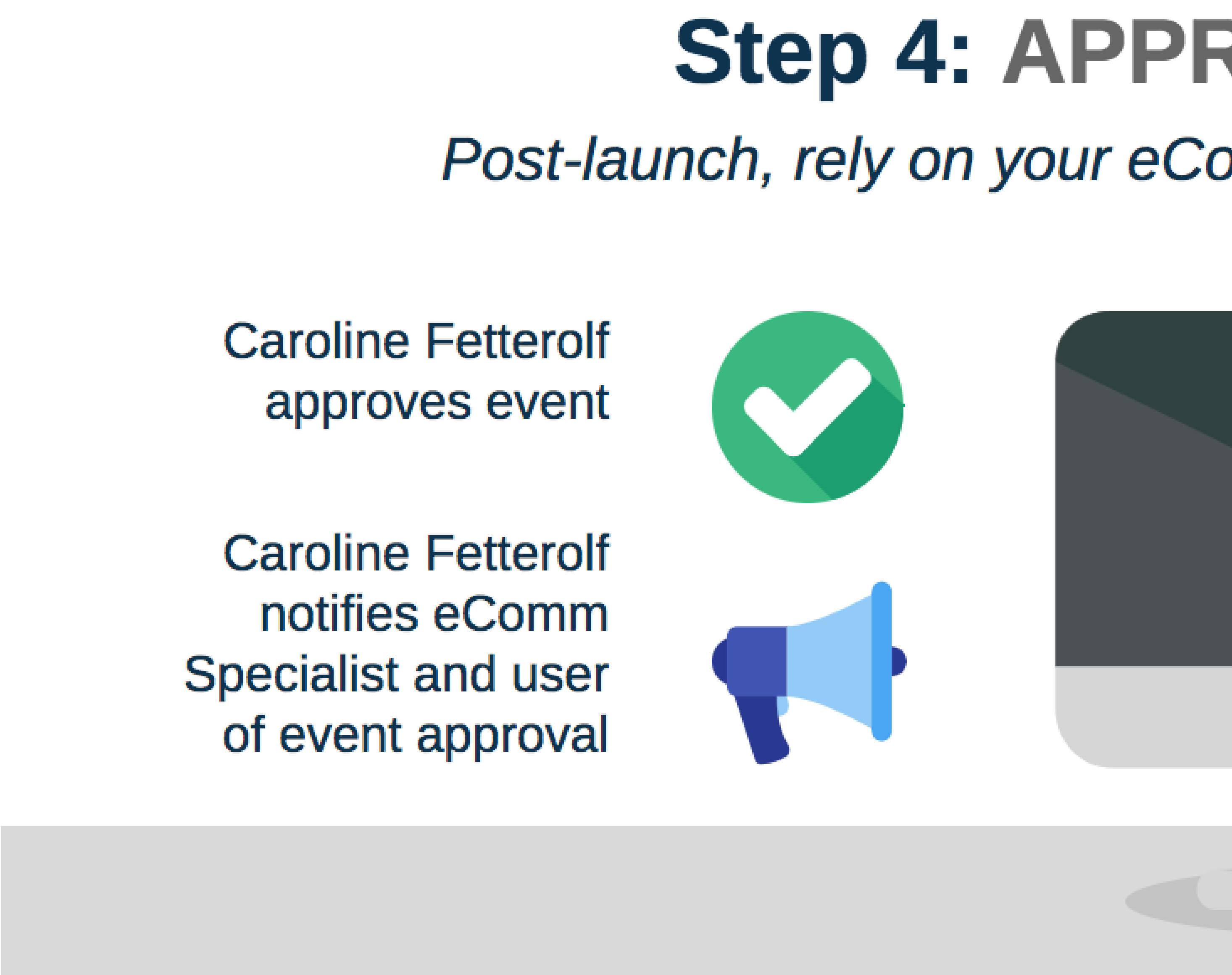


- Review Event
- Advancement Review
- Testing
- Feedback

Notify your eComm Specialist when your event is ready for review. Be sure to double check that your event configurations comply with the information outlined in the Cvent Donation Guide [3].
Your eComm Specialist will alert System Advancement that your Cvent event is ready for review. The System Advancement team will conduct a review of your event to ensure it is configured correctly with the requirements in the Cvent Donation Guide [3] in mind.
System Advancement will work with the Office of the University Controller to test your event. This is a key step in the process to ensure that additional changes are not required.
System Advancement will provide event testing feedback to you and your eComm Specialist. You'll have the opportunity to review that feedback and make the appropriate

changes before your event is submitted for approval.

Step 4: Approve and Launch

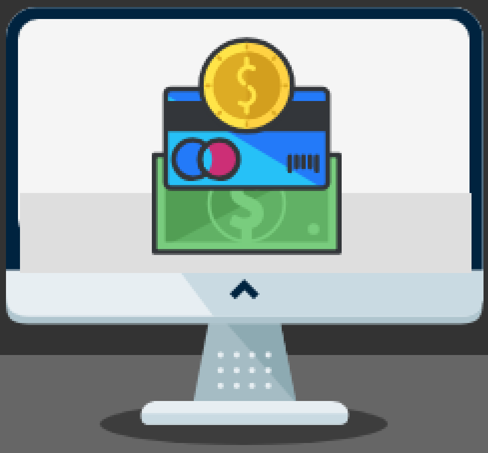


- Submit for Approval
- Approval Notification
- Launch your Event
- Ongoing Support

When you're ready, submit your event to your eComm Specialist for approval. Your eComm Specialist when then notify System Advancement that your event is ready for final review and approval. The System Advancement team will verify that any changes requested in the earlier review have been completed.
System Advancement will notify both you and your eComm Specialist when your event has been approved. Once you hear from System Advancement that your event has been approved, you can be sure you are in compliance with the Cvent Donation Guide [3] and the fundraising event requirements in the Office of the University Controller.

Launch your event and begin accepting registrations. You did it! You can now be sure that your fundraising event registration form is properly configured to create a streamlined experience for both you and your event attendees.
If you require ongoing support throughout your event, work directly with your eComm Specialist.

Ready to see and download all the steps together?



Create Cvent Fundraising Event in Four Steps

Creating fundraising events in Cvent involves working with multiple teams across CU: your eComm Specialist, CU Advancement, and the Office of the University Controller.

This guide provides the basic steps you should follow to be successful.
For detailed instructions, visit www.cu.edu/blog/ecomm-wiki and search for "Creating Fundraising E

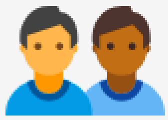
Create a fundraising event: step by ste

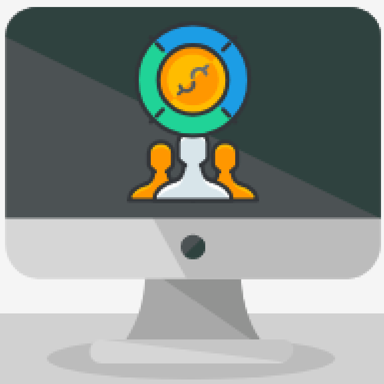
Step 1: CONNECT

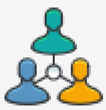
Multiple teams are involved in creating fundraising events. Connect with them at lea three to four weeks prior to launching your event registration form.

Connect early to maximize shared knowledge

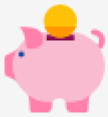
User connects with eComm Specialist about fundraising event







eComm Specia connects with Caroline Fetter

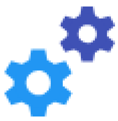


eComm Specia connects user Karen Ichiba

Step 2: BUILD

Refer to the eComm wiki post "Creating Fundraising Events" for more information.

User works with eComm Specialist to build event



User requests allocation code eComm Specia

Cvent [5], fundraising event [6], fundraising [7], donation [8], fair market value [9], tax deductibility [10]

Cvent Donations Guide [11]

Creating Fundraising Events [12]

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