

## **Cvent Fundraising Events New** <sup>[1]</sup>

July 15, 2021 by [melanie.jones@cu.edu](mailto:melanie.jones@cu.edu) <sup>[2]</sup>

Planning a fundraising event at CU? This guide walks you through every step of the process — from your first conversation with your eComm specialist to the final launch of your Cvent registration page. Whether this is your first event or your fiftieth, this resource is designed to help you:

- Understand what qualifies as a material fundraising event
- Know who to contact and when
- Complete the required forms and approvals
- Build a compliant Cvent registration page
- Feel confident that you're following university policy every step of the way

Each step must be completed before moving on to the next.

### **1 | Inform eComm Specialist & Campus Advancement**

- Event Planner
- eComm Specialist
- Campus Advancement

#### **1A | Inform Your eComm Specialist**

Start by contacting your eComm specialist. They will help determine whether your event qualifies as a material fundraising event.

A material fundraising event is one that:

- Is intended to raise gift funds for a CU organizational unit
- Typically provides goods and/or services to attendees
- Charges an admission or registration fee of \$75 or more, and the University is providing goods or services in return

If all these are met, it likely qualifies as material. In such cases, CU is required to issue an official payment acknowledgment. These events must be reviewed and approved by the Office of University Controller (OUC).

## CAN NON-MATERIAL FUNDRAISING EVENTS BE IN CVENT???

**TIP!** Already hosted a material fundraising event in Cvent and worked with campus Advancement? Let your eComm specialist know who was involved to speed up the process.

### **1B | Connect with Campus Advancement**

Your eComm specialist will connect you with your campus Advancement team. This early notification is important to ensure that Campus Advancement can provide the minimum required support to move the fundraising process forward. WHAT IF THEY DO NOT HAVE CAPACITY????

Minimum Required Support from Campus Advancement:

- An Advancement partner must request the designation code from the CU Foundation after the Office of University Controller signs the Fundraising Authorization (FA) form.
- Later on, an Advancement partner must assist in pulling an event fundraising report through Advancement Intelligence/CU Ascend.

eComm specialists will help users with the next steps in the Cvent fundraising event process, especially connecting them to the correct parties.

### **1A | Event Planner Informs eComm Specialist**

When an event planner is interested in hosting a material fundraising event with their campus unit or department, they must contact their campus eComm specialist as the first step. During this initial consultation, the eComm specialist should determine if the event qualifies as a material fundraising event by asking:

- Is the event intended to raise gift funds for a CU unit?
- Will attendees receive goods or services in exchange for payment?
- Is the registration/admission fee \$75 or more?

If the answer to these is yes, the event likely qualifies as material and must follow the full fundraising event process. If the event does not meet these criteria, it may be considered immaterial, and a simplified process without OUC should be applied.

eComm specialists will help users with the next steps in the Cvent fundraising event process, especially connecting them to the correct parties.

### **1B | eComm Specialist Informs Campus Advancement**

eComm specialists should connect the event planner with Campus Advancement to ensure they can provide the minimum required support to move the fundraising process forward.

## **Campus Advancement Contacts**

Boulder | abababab??

Denver & Anschutz | ababab??

UCCS | abababa???

System | ababab??

### **EMAIL EXAMPLE**

FROM: eComm Specialist

TO: Campus Advancement

CC: Event Planner

ATTACHED: ???

BODY: Hello. I am reaching out about step 3?? of this process for fundraising events in Cvent (wiki). ?????

### **1A | Event Planner Connects with eComm Specialist**

The event planner contacts their eComm specialist to ensure it's a material fundraising event that should follow the process outlined in this wiki.

### **1B | eComm Specialist Informs Campus Advancement**

The campus eComm specialist will connect the event planner with their campus Advancement. Please ensure that Campus Advancement can provide the minimum required support to move the fundraising process forward. WHAT IF THEY DO NOT HAVE CAPACITY????

Minimum Required Support from Campus Advancement:

- An Advancement partner must request the designation code from the CU Foundation after the Office of University Controller signs the Fundraising Authorization (FA) form.
- Later on, an Advancement partner must assist in pulling an event fundraising report through Advancement Intelligence/CU Ascend.

Please reply to all to include the event planner (CC-d).

## **2 | Inform Campus Controller's Office and Start Fundraising Authorization (FA) Form**

- Event Planner
- eComm Specialist
- Campus Controller

## **2A | Campus Controller's Office Approval**

Your eComm specialist will connect you with your campus Controller's office. The event planner will then work with your Campus Controller's Office to ensure your event is financially viable and compliant with university policies. Your campus controller staff will assist event planners (usually with a fair amount of back-and-forth) with:

- Budget review to confirm event viability
- Fair Market Value (FMV) calculations for admission and sponsorships
- Unrelated Business Income Tax (UBIT) review
- Alcohol compliance, if applicable (via campus-specific authorization forms and procedures)

**Important:** The information gathered during this step will be required for the Office of University Controller (OUC) to accept your Fundraising Authorization (FA) form submission in step 3.

## **2B | Complete the campus section of the Fundraising Authorization (FA) Form. LINKS????**

This section must be reviewed and signed by:

- The Program Principal
- The Organizational Unit Officer

Once complete, let your eComm specialist know (provide the completed FA form and all other documentation???). They will confirm all steps are complete and connect you with the University Controller.

## **2A | Campus Controller's Office Approval**

Your eComm specialist will connect you with your campus Controller's office. The event planner and the Campus Controller's Office will work together to ensure the event is financially viable and compliant with university policies. Your campus controller staff will assist event planners (usually with a fair amount of back-and-forth) with:

- Budget review to confirm event viability
- Fair Market Value (FMV) calculations for admission and sponsorships
- Unrelated Business Income Tax (UBIT) review
- Alcohol compliance, if applicable (via campus-specific authorization forms and procedures)

## **Campus Controller Contacts**

- Boulder | [salestax@colorado.edu](mailto:salestax@colorado.edu) [3]
- Denver & Anschutz | [Finance.AccountingHelp@ucdenver.edu](mailto:Finance.AccountingHelp@ucdenver.edu) [4] (team escalates it to Ryan Yu, Deputy Controller)
- UCCS | [acctfinc@uccs.edu](mailto:acctfinc@uccs.edu) [5]
- System | [FSS@cu.edu](mailto:FSS@cu.edu) [6]

For more information, visit the [Campus Controllers & Finance Offices](#) page [7].

**Important:** The information gathered during this step will be required for the Office of University Controller (OUC) to accept your Fundraising Authorization (FA) form submission in step 3.

## **2B | Complete the campus section of the Fundraising Authorization (FA) form. LINKS????**

This section must be reviewed and signed by:

- The Program Principal
- The Organizational Unit Officer

Once complete, the event planner will let you (their eComm specialist) know and provide the completed FA form with all other documentation???. You should confirm all steps are complete and connect the event planner with the University Controller.

ADD?DELETE?? The event planner will work with the Campus Controller's Office to review budget, FMV, sponsorships, UBIT, and alcohol compliance. Together, the event planner and the campus Controller's Office will complete the campus portion of the FA form and obtain required signatures.

### **EMAIL EXAMPLE**

FROM: eComm Specialist

TO: Campus Controller

CC: Event Planner

ATTACHED: ?????

BODY: Hello. I am reaching out as step 2 of this process for fundraising events in Cvent (wiki link). Once complete/approved, please include all attachments and 'reply all' so everyone is notified and can take the next steps.

## **2A | Campus Controller's Office Approval**

A Campus eComm specialist will initiate an email to connect the event planner with you (their campus Controller's office). You (Campus Controller's Office) and the event planner will work together to ensure the event is financially viable and compliant with university policies. Your campus controller staff will assist event planners (usually with a fair amount of back-and-forth)

with:

- Budget review to confirm event viability
- Fair Market Value (FMV) calculations for admission and sponsorships
- Unrelated Business Income Tax (UBIT) review
- Alcohol compliance, if applicable (via campus-specific authorization forms and procedures)

**Important:** The information gathered during this step will be required for the Office of University Controller (OUC) to accept your Fundraising Authorization (FA) form submission in step 3.

## **2B | Complete the campus section of the Fundraising Authorization (FA) form. LINKS????**

This section must be reviewed and signed by:

- The Program Principal
- The Organizational Unit Officer

Once complete, the event planner will let their eComm specialist know and provide the completed FA form with all other documentation???. The eComm specialist will confirm all steps are complete and connect the event planner with the University Controller.

ADD?DELETE?? The event planner will work with the Campus Controller's Office to review budget, FMV, sponsorships, UBIT, and alcohol compliance. Together, the event planner and the campus Controller's Office will complete the campus portion of the FA form and obtain required signatures.

## **3 | Submit Fundraising Authorization (FA) Form**

- Event Planner
- eComm Specialist
- Campus Advancement
- University Controller (OUC)

### **3A | Engage Office of University Controller (OUC)**

Your eComm specialist will submit the completed package to the Office of University Controller (OUC) for signature, on your behalf. You (the event planner) and Campus Advancement will be cc-d on the email.

The following documents are required as part of the submission:

- Fundraising Authorization (FA) form

- Budget
- Fair Market Value (FMV) chart, including for sponsorships
- Campus Alcohol Authorization, if applicable
- Identification of campus eComm specialist supporting the event
- Identification of campus Advancement partner
  - IS THIS THE FIRST EVENT OR RECURRING??

The OUC may reach out to you for additional documentation or to clarify some details.

### **3B | Office of University Controller (OUC) Approval**

OUC will reply to all (from the original message) once approved and signed. Everyone (including you as the event planner) will be CC-d on their response.

### **3C | Campus Advancement Request Designation Code**

When Campus Advancement) receives the reply, they will request a designation code from CU Foundation for this event. CAN FOUNDATION REPLY WHEN THE DESIGNATION CODE AND SPEEDTYPE HAS BEEN CREATED?

ONCE THE DESIGNATION CODE AND SPEEDTYPE HAS BEEN CREATED, CAMPUS ADVANCEMENT WILL LET THE ECOMM SPECIALIST AND EVENT PLANNER KNOW.

### **3D | Designation Code /Speedtype Added to Cvent**

The Event Planner will request to have the designation Code / Speedtype added to Cvent. They will let you know once it is available, to be selected in your Cvent event.

### **3A | Engage Office of University Controller (OUC)**

Collect the following materials from the event planner, then send them to the Office of University Controller (OUC) with the event planner and campus Advancement CC-d.

- Fundraising Authorization (FA) form
- Budget
- Fair Market Value (FMV) chart, including for sponsorships
- Campus Alcohol Authorization, if applicable
- Identification of campus eComm specialist supporting the event
- Identification of campus Advancement partner
  - IS THIS THE FIRST EVENT OR RECURRING??

EMAIL EXAMPLE

FROM: eComm Specialist

TO: FSS@cu.edu [6]

CC: Event Planner, Campus Advancement, Campus Controller

ATTACHED: all the things :)

BODY: Hello. I am reaching out as step 3?? of this process for fundraising events in Cvent (wiki). Once complete/approved, please keep all attachments and reply to all so everyone is notified and can take the next steps.

### **3B | Office of University Controller (OUC) Approval**

OUC will reply to all (from the original message) once approved and signed.

### **3C | Campus Advancement Request Designation Code**

When Campus Advancement) receives the reply, they will request a designation code from CU Foundation for this event. CAN FOUNDATION REPLY WHEN THE DESIGNATION CODE AND SPEEDTYPE HAS BEEN CREATED?

ONCE THE DESIGNATION CODE AND SPEEDTYPE HAS BEEN CREATED, CAMPUS ADVANCEMENT WILL LET THE ECOMM SPECIALIST AND EVENT PLANNER KNOW.

### **3D | Add Designation Code / Speedtype to Cvent**

You (as the eComm Specialist) should request the Designation Code / Speedtype (provided by Campus Advancement) to be added to Cvent (submit help ticket).

### **3A | Engage Office of University Controller (OUC)**

The campus eComm specialist will submit the completed package to the Office of University Controller (OUC) for signature, on the event planner's behalf. You (Campus Advancement) and the event planner will be cc-d on the email.

### **3B | Office of University Controller (OUC) Approval**

OUC will reply to all (from the original message) once approved and signed.

### **3C | Campus Advancement Request Designation Code**

When you (Campus Advancement) receive the reply, request a designation code from CU Foundation for this event. CAN FOUNDATION REPLY WHEN THE DESIGNATION CODE AND SPEEDTYPE HAS BEEN CREATED?

ONCE THE DESIGNATION CODE AND SPEEDTYPE HAS BEEN CREATED, LET THE ECOMM SPECIALIST AND EVENT PLANNER KNOW.

**Why this matters:** Event designations are specifically set up for event finances, and net proceeds are transferred to their fundraiser purpose gift fund at the end of event activity. Event designations and their associated event SpeedTypes are inactivated (by CUF



Accounting and by the campus controller's office, respectively, at the end of event financial close (\$-0- bal).

Please notify your Advancement partner if this is a new event or a repeat of a previous one, as this will affect the type of request they submit to the CU Foundation. ABOVE STEP

For Advancement partners ??CAMPUS ADVANCEMENT???:

If you're reactivating an existing designation code: Submit your request to CUF Accounting. CUF Accounting will then request that your Campus Controller's Office reactivate the associated SpeedType.

If you're requesting a new designation code: Submit your request to CUF Compliance. CUF Compliance will request that your Campus Controller's Office create a new SpeedType.?????

**Important:** Request that your Advancement partner share the designation code with you to confirm it has been created and send this to your eComm specialist.

### **3D | Add Designation Code / Speedtype to Cvent**

The eComm Specialist will get the Designation Code / Speedtype (provided by Campus Advancement) to be added to Cvent for the event planner to choose when creating the event.

### **3A | Engage Office of University Controller (OUC)**

An email will be received by FSS@cu.edu [6] from the eComm specialist (with all relevant parties CC-d), including all documentation created by the event planner and campus controller. OUC will work with relevant parties to address any questions.

### **3B | Office of University Controller (OUC) Approval**

OUC will reply to all (from the original message) once approved and signed.

- To: Campus eComm Specialist
- CC: Event Planner, Campus Advancement, Campus Controller

### **3C | Campus Advancement Request Designation Code**

Upon receipt, Campus Advancement will request a Designation Code from CU Foundation for the event. CAN FOUNDATION REPLY WHEN THE DESIGNATION CODE AND SPEEDTYPE HAS BEEN CREATED?

ONCE THE DESIGNATION CODE AND SPEEDTYPE HAS BEEN CREATED, LET THE ECOMM SPECIALIST AND EVENT PLANNER KNOW.

### 3D | Add Designation Code / Speedtype to Cvent

Upon confirmation of the Designation Code / Speedtype being created, the eComm Specialist will request it be added to Cvent for the event planner to use when creating their Cvent event.

## 4 | Finalize Compliance Language & Build Cvent Event

*EVENT PLANNER | WHO ELSE???*

- Event Planner
- eComm Specialist

### 4A | Finalize Compliance Language

Now it's time to finalize the compliance language for your Cvent registration page and any related materials. Here's what you need to do:

- Use the Fundraising Cvent Compliance Language Guide.docx as your reference.
  - It will require you to state a refund policy, fund statement, bank charges statement, FMV statement, and an optional donation statement, if applicable.
- Fill out the language guide as a worksheet and submit it to your eComm specialist (step 7) when you submit your event for review.
- Incorporate the standard language provided by OUC when they returned your signed FA form.

Don't worry! Both the System eComm team and OUC will review and approve the final language during final Cvent review to make sure everything is correct.

### 4B | Build Cvent Event

Now it's time to build your Cvent registration page! Make sure the Cvent includes:

- Fair Market Value (FMV) details for tickets and sponsorships
- Compliance language you completed in the Cvent Compliance Language Guide worksheet
- Refund policy – Important: refund policy should be implemented in Cvent not just stated in compliance text
- Relevant assets, such as event images, banners, or logos
- Accessible design, to ensure the page meets ADA compliance standards

Fundraising Cvents often include multiple registration paths and admission items, and can be tricky to build, so be sure to reach out to your eComm specialist or Cvent Support if you need help.

You may also want to gather feedback from your unit or department on the registration flow, branding, and overall presentation, just like you would for any standard Cvent event.

**Important:** Optional donations should ONLY be available to attendees and sponsors when creating registration paths. Other Optional donations should be linked to the appropriate Give Campus page.

#### **4A | Finalize Compliance Language**

Direct the user to use the Fundraising Cvent Compliance Language Guide as a reference to build out the compliance language specific to the event

Ask them to include the completed worksheet when they send the Cvent to you for review

#### **4B | Build Cvent Event**

Inform the user that they can start building their Cvent page. Events of this nature can be complicated in CVENT, with multiple registration paths and admission types, so let the user know you are available for help as they put it together.

Make sure to submit a ticket to add a ST or designation code to CVENT if needed

### **5 | Request eComm Specialist Approval**

*EVENT PLANNER | ECOMM SPECIALIST*

- Event Planner
- eComm Specialist

#### **5A | Ask for eComm Specialist Approval**

Once your Cvent registration page is built, ask your campus eComm specialist to review it for approval. Be sure to send them your completed Cvent Compliance Language Guide worksheet when you request their review.

**Important:** Unlike regular free and paid Cvents, your campus eComm specialist is not able to approve and launch Cvents. After they review them, they must submit them to System Advancement Digital Marketing for final approval.

#### **5B | System Advancement for Final Review**

After an initial review, the eComm specialist will send the event along System Advancement for another review.

## 5A | Ask for eComm Specialist Approval

Once the user has built the Cvent registration page, review the event, with special attention to:

- FMV
- Compliance language
- Refund policy – Important: refund policy should be implemented in Cvent not just stated in compliance text

**Important:** Optional donations should ONLY be available to attendees and sponsors when creating registration paths. Other optional donations should be linked to the appropriate Give Campus page.

## 5B | System Advancement for Final Review

When the event looks good to you, it's time to submit it for final review to System Advancement Digital Marketing.

**You're All Set!**

## Remaining Steps

*ECOMM SPECIALIST | ADVANCEMENT | UIS/SYSTEM ECOMM???*

Once you've completed Steps 1–5, your part of the process is done. From here, the remaining steps are handled behind the scenes by campus and system teams. Here's what happens next:

- Campus eComm Specialist?? Submits for System review: Your campus eComm specialist will submit a Fundraising Cvent Approval Request to CU System Advancement Digital Marketing once everything is in place.
- System Advancement coordinates with UIS System Advancement to input the designation code into the Cvent backend.???
- Final Review and launch: System Advancement reviews the Cvent for compliance and sends a test to OUC. They'll request any final changes directly from your campus eComm specialist. Once approved, your eComm specialist will be all set to launch the Cvent and will notify you.

## DELETE 4 | Inform Campus eComm Specialist

EVENT PLANNER | ECOMM SPECIALIST

CAN THIS BE COMBINED WITH STEP 4?? IF OUC CC's MEC???

- Event Planner
- eComm Specialist

After receiving event approval from the Office of University Controller (OUC), you must notify your campus eComm specialist. CC the eComm specialist on the email that includes the signed FA form from OUC. This serves as confirmation that OUC has reviewed the event. CC OR FORWARD EMAIL??? CAN OUC CC ECOMM SPECIALIST???

Once notified, your campus eComm specialist can help guide you through the remaining steps of the process.

You should know the user has successfully completed steps 2-5 when you receive the FA form from them, signed by the OUC.

At this juncture, your user should come back to you to complete their step 6, which will often involve a meeting with you. Here, you should instruct the user to complete steps 7-9 in their parallel process.

## 5 | Request Designation Code

### EVENT PLANNER | CAMPUS?? ADVANCEMENT

- Event Planner CAMPUS ADVANCEMENT
- eComm Specialist

Ask your Advancement contact to submit a CU Foundation (CUF) request to obtain a new designation code for the event. BASED ON THE EMAIL REPLY FROM OUC, CAMPUS ADVANCEMENT WILL REQUEST DESIGNATION CODE FROM CU FOUNDATION. CAMPUS ADVANCEMENT WILL REPLY TO ALL (INCLUDING USER, OUC, AND CAMPUS ECOMM SPECIALIST) WITH THE DESIGNATION CODE (ONCE CREATED???MAYBE MEC DOESN'T NEED TO CONFIRM??).

**Why this matters:** Event designations are specifically set up for event finances, and net proceeds are transferred to their fundraiser purpose gift fund at the end of event activity. Event designations and their associated event SpeedTypes are inactivated (by CUF Accounting and by the campus controller's office, respectively, at the end of event financial close (\$-0- bal).

Please notify your Advancement partner if this is a new event or a repeat of a previous one, as this will affect the type of request they submit to the CU Foundation. ABOVE STEP

For Advancement partners ??CAMPUS ADVANCEMENT???:

If you're reactivating an existing designation code: Submit your request to CUF Accounting. CUF Accounting will then request that your Campus Controller's Office reactivate the

associated SpeedType.

If you're requesting a new designation code: Submit your request to CUF Compliance. CUF Compliance will request that your Campus Controller's Office create a new SpeedType.?????

**Important:** Request that your Advancement partner share the designation code with you to confirm it has been created and send this to your eComm specialist.

User Step 7: Activate the Designation Code and SpeedType ???? BASED ON THE RESPONSE FROM CAMPUS ADVANCEMENT, THE ECOMM SPECIALIST SHOULD REQUEST THE NEW DESIGNATION CODE / SPEEDTYPE TO BE ADDED TO CVENT (HELP TICKET LINK).

Ask the user to contact their campus Advancement partner to submit a CUF request.

Help them determine whether the request is for a new designation code or a reactivation of an existing code

PUT AT TOP >> THEN REQUEST TO BE ADDED TO CVENT. Track the status of the designation code and SpeedType activation. DO THEY NEED TO REQUEST ACCESS / GET TRAINED ON THIS???

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