

Year End Gift Processing - December 2016

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Year End Gift Processing Agenda

- Goal is to cover these main areas:
 - Bursar Office Closure
 - Messaging to Department Heads, Deans and Donors
 - Coverage for University Closure
 - Special Arrangements for Large Gifts
 - Securing Your Area
 - Scheduled Power Outage
 - Remote Accessibility and Security of Data



Bursar's Office Closures

- We anticipate that Campus may be closed early or completely on Friday, December 23rd.
- In order to process gift payments prior to the campus closure, please request that donor's send or deliver checks before:

Thursday, December 22nd at 12:00PM

- Please alert Deans, their assistants, Assistant Deans and Department Heads that gifts and pledges should be in before the deadline.
- I will send copies of the messaging to Mark and the department.
- Development website will be updated with script

Script for Holiday Break –Email and Development Website:

Thank you for contacting San Francisco State's Office of University Advancement.

The University will be closed over the holidays from December 23 to January 2, and will re-open on Tuesday, January 3, 2017.

If you would like to **make a donation via credit card and want the gift recorded in this calendar year**, please follow one of the following links:

[I would like to make a gift online to support academic programs and scholarships](#)

[I would like to make a gift online to support Athletics](#)

Please note that credit card gifts sent via the U.S. mail or fax will not be processed this calendar year.

If you would like to make a gift of stock or to speak to a development officer, please contact Funmi Vogt, Director of Development, at fvogt@sfsu.edu or 415-338-1193 and she will be pleased to assist you.

If you would like to make a gift by check, please make it payable to the University Corporation, San Francisco State, and mail it to:

Office of University Development

San Francisco State University

1600 Holloway Avenue, ADM 153

San Francisco, CA 94132-1722

Please make sure the envelope is postmarked by December 31, 2016.

Thank you for your support of San Francisco State, and have a wonderful holiday season!



Voicemail messaging

The University will be closed over the holidays from December 23 to January 2, and will re-open on Tuesday, January 3, 2017.

If you would like to make a gift of stock, arrange a wire transfer or speak to a development officer, please contact Funmi Vogt, Director of Development, at fvogt@sfsu.edu or 415-338-1193 and she will be pleased to assist you.

If you would like to make a gift by check, please make it payable to the University Corporation, San Francisco State, and mail it to:

Office of University Development
San Francisco State University
1600 Holloway Avenue, ADM 153
San Francisco, CA 94132-1722

Please make sure the envelope is postmarked by December 31, 2016.

If you would like to make a donation via credit card and want the gift recorded in this calendar year, please visit our online donation page at develop.sfsu.edu, click on “Make a Gift Now,” then click on “I would like to make a gift online.”

Please note that credit card gifts sent via the U.S. mail or fax will not be processed this calendar year.

Thank you for your support of San Francisco State, and have a wonderful holiday season!



Coverage for Closure

- Gift Processors will be checking 415-338-1042 number from Dec. 23rd until January 2, 2017.
- Funmi Vogt will be the DOD on duty – all messaging should include her contact information
 - We met with Funmi to go over procedures
 - We provided Funmi with access to key forms i.e. wire transfer forms, stock/securities forms, etc.



Office Closure Messaging

- Please change your voicemail messaging
 - Take instructions on how to remotely access voicemail with you
 - Dial 415-338-6000
 - Dial your mailbox number
 - Dial your password
- Set your Outlook Out of Office message with a personalized script prior to leaving the office with the date you will be returning to the office.
- Let us know if we need to circulate instructions on how to set MS Outlook Out of Office notification.



Special Arrangements for Large Gifts

- If you anticipate any large donations coming in, please let Irina, Caroline and Mark know prior to the closure.
- Be prepared to let us know who the donor is, what fund or program or scholarship it will be applied to, how they expect to submit payment, form of payment, contact information for the donor, etc.
- Please complete a Gift Acceptance Form in advance for any anticipated checks – especially for the Foundation prior to the 16th, if possible. (Otherwise we will have to contact the Board Chair).



Agreement and Pledge Schedule Dates

- In the future, please consider using December 1 - December 15 on agreements and pledge schedules where possible (if the donor has some flexibility).
- Ensures that we get pledge payments and donations in larger amounts before the holiday closure when we are in the office to process and receipt accordingly.
- Takes pressure off donor to get something in last minute on Dec. 31st.



Scheduled Power Outages

- Advance database will be accessible over the closure (via VPN).
- **Scheduled power outage for the ADM building on Tuesday, December 27th from 9:30AM to 12:00PM**
- Weather caused outages may cause some interruption. However, our wonderful IT staffer, Hao, will come over if needed to help out.



IT Needs

- <http://tech.sfsu.edu/it/uguides>
 - DoITs list of How to Guides for university systems.
- <http://tech.sfsu.edu/guides/information-security-program>
 - Information on protecting your computer and sensitive data



Accessibility During the break

- Shared Drive Access
 - Gerard to give out separate directions
 - Unavailable during power outage
 - Suggest to load download work files to Box.com
 - All Staff have 50gb free space
 - <http://tech.sfsu.edu/guides/box-sfstate-file-sharing>
 - Web Access: <https://sfsu.box.com>
 - Also available via computer/phone apps



VPN

- <http://tech.sfsu.edu/guides/vpn>
- 2 Versions Web and application
 - Web (not available on mac)
 - uses web browser
 - Requires latest java
 - Application
 - Download and install
 - Directions on tech.sfsu.edu
- Phone apps available through iTunes and Google Play.



Security Measures

- Never access Advance/AWA in a public place unless you are sure the donor data cannot be compromised– watch out for someone looking over your shoulder on BART or trains, for example
- Password protect your files with donor data!
- Please delete downloaded files from your laptop
- Never leave a laptop or other computer device unattended
- Always log out of a computer when it is not in use
- Never download items without authorization
- If you suspect breach of security, contact Julianne Tolson/ITS department immediately at jtolson@sfsu.edu
 - **Also contact Mark, Venesia and Caroline**
 - **If this is part of a theft, please file a police report with local police agency or University Police**

Secure Your Personal Work Space

- Power off your computers, monitors, printers and power strips
- Lock laptops (if you leave it in office do not leave out in the open)
- Lock cabinets and drawers
 - Check to make sure you do not leave sensitive material around your desk
- Offices with windows:
 - Shut/lock windows
 - Water your plants
 - Close blinds
 - Get your perishable food out of the refrigerators!



Questions?

- Have a wonderful holiday season!

