Year End Gift Processing – December 9, 2020

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Year End Gift Processing Agenda

• Goal is to cover these main areas:
  o Bursar Office Hours
  o Coverage for University Closure
  o Important Dates for Gift Processing
  o Messaging to Donors, Department Heads and Deans
  o Special Arrangements for Large Gifts
  o Fire Alarm Testing/Power Outages
  o Virtual Private Network (VPN) and Data Access
  o Security Measures
Bursar’s Office Current Schedule

The Bursar’s Office hours in the Administration Bldg. lobby have changed again. They are now open:

**Tuesdays ONLY from 8:30AM-2:00PM**

Any donor that would like to drop off a check for Advancement at the Bursar’s Office Drop Box should do so by Dec. 18\textsuperscript{th} at 5PM.

If you have a donor who would like to drop off a check to the drop box, please contact Irina Krasnitskaya for instructions.
Important Dates for Gift Processing

• We anticipate that Campus may be closed early or completely on Thursday, December 24th.

• In order to process gift payments prior to the campus closure, please request that donors send checks before:

   **Friday, December 18th**

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 DOD’s and the department in a few days.

• Development website “Make a Gift” page will be updated with script messaging as well.
Coverage for Holiday Closure

• Gift Processing will be checking 415-338-1042 number from Dec. 24th through January 3, 2021.

• Mail Services on campus is CLOSED during the holiday break. Gift processors will not be coming to campus to process checks.

• Please do not have donors send checks via Fed Ex or UPS which require signatures upon delivery.

• Manny Nungaray will be the DOD on duty – all messaging should include his contact information.

• Planned Giving inquires can be sent directly to Tom Mullaney during the closure.
Script for Holiday Break – Email and Development Website:

- Message will alert page visitors/donors that the University will be closed over the holidays from December 24 to January 3, and will re-open on Monday, January 4, 2021.
- Donors will be able to access links to support scholarships and programs, athletic programs and link to instructions for stock and securities donations.
- Provides Manny’s contact information for donor assistance.
- Provides information on how to make a gift by check and where to mail and to please make sure the envelope is postmarked by December 31, 2020.
- If you wish to donate using your credit card for tax credit this calendar year, please use our online donation page found here: Make a Gift
Voicemail messaging

The main Development phone line (415)338-1042 message will contain the same information as the script messaging with the addition of:

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,” then click on “Donate Now to Programs or Scholarships”.
Personal Voicemail Messaging

• Please change your voicemail messaging
  o Take instructions on how to remotely access voicemail with you
    ▪ Dial 415-338-6000, enter # for mailbox on system
    ▪ Enter your mailbox number
    ▪ Enter your password

• Set your Outlook Out of Office message with a personalized script prior (using the messaging provided) and please mention the date you will be returning to the office.
Special Arrangements for Large Gifts

• If you anticipate any large donations coming in, please let Irina, Caroline and Anjali 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 (GAF) in advance for any anticipated large checks prior to Dec. 21st, if possible.

• First two weeks of January Gift Acceptance Forms – if you are a DOD and planning to be out of the office at the beginning of the year, please have a colleague and admin help cover to complete the GAF forms.
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.
Fire Alarm Testing

- There will be a fire alarm test in the Admin Building on Tuesday, Dec. 15th from 7:15am to 8:15am.
- Time may be a little later so any essential personnel staff coming in should be prepared to stay out until the alarm tests are over.
- Everyone will be asked to leave the building during the alarm testing so I would not plan to come in before 8:30am.
Scheduled Power Outages

• Advance database will be accessible over the closure (via VPN).

• Scheduled power outage for the ADM building
  o There will be power outages in the building over the break. I will send an email when I get the details from Jesus Garcia.
  o Weather caused outages may cause some interruption. However, our wonderful IT staffer, Hao, will come over if needed to help out.

The heat in the building will be off during the holiday closure. If essential personnel have to come in for any reason, bring a parka.
Virtual Private Network (VPN)

- [http://tech.sfsu.edu/guides/vpn](http://tech.sfsu.edu/guides/vpn)
  - Global Protect phone apps available through iTunes and Google Play.

For any IT help, please contact Gerard Enriquez:
- [genrique@sfsu.edu](mailto:genrique@sfsu.edu)
Accessibility During the break

• Shared Drive Access
  o Gerard has directions if anyone still needs access
  o Unavailable during power outage

• Box.com
  o Box.com files will be available during outage times if you absolutely have to work on something
  o Suggest to load download work files to Box.com if you need to work on them during the outage
  o All Staff have 500gb free space (up from 50gb)
  o [http://tech.sfsu.edu/guides/box-sfstate-file-sharing](http://tech.sfsu.edu/guides/box-sfstate-file-sharing)
  o Web Access: [https://sfsu.box.com](https://sfsu.box.com)
  o Also available via computer/phone apps
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!

• Never leave a laptop or other computer device unattended.

• Always log out of a computer when it is not in use.

• If you suspect breach of security, contact Mary Morshed, Information Security Officer, immediately at mmorshed@sfsu.edu and inform VP Jeff Jackanicz.

• If this is part of a theft, please file a police report with your local police agency and/or University Police.
Upcoming Advancement Roundtables

Friday, January 29th from 11:00am to 12:00pm
• Topic: Black History/Africana Studies
  o Presented by Dr. Abul Pitre, New Chair of Africana Studies, College of Ethnic Studies

Friday, February 26th from 11:00am to 12:00pm
• Topic: Gender Differences in Communicative Abstraction
  o Presented by Professor Priyanka Joshi, Assistant Professor in the Lam Family College of Business
Questions?

Please contact Caroline Johansson at cjoh@sfsu.edu

THANK YOU & HAPPY HOLIDAYS!