

Development Operations  
Baseline Standards  
FY2021

Description of Responsibility		Responsible Person(s) (Name/Title)	
		Primary (Required)	Secondary (Optional)
<b>CASH HANDLING</b>			
1	Collecting cash, checks, etc.		
	<i>Development</i>	Manager of Gift Processing & Records: Ronnie Calhoun	All Gift & Records Analysts: Donna Smith, Kemelya Moore, Barbara Moore, Alice Gee, Jennifer Rosas Matching Gift Coordinator: Thu-Van Nguyen
	<i>Corporate &amp; Foundation Relations</i>	Administrative Assistant: Amy Healy	All Gift & Records Analysts: Donna Smith, Kemelya Moore, Barbara Moore, Alice Gee, Jennifer Rosas Matching Gift Coordinator: Thu-Van Nguyen
	<i>Constituent &amp; College Development</i>	Assistant VP of University Development - Russell Dunlavy & Mark Putnam	All Gift & Records Analysts: Donna Smith, Kemelya Moore, Barbara Moore, Alice Gee, Jennifer Rosas Matching Gift Coordinator: Thu-Van Nguyen
	<i>Annual Giving</i>	Director of Annual Giving: Sophia James	All Gift & Records Analysts: Donna Smith, Kemelya Moore, Barbara Moore, Alice Gee, Jennifer Rosas Matching Gift Coordinator: Thu-Van Nguyen
	<i>Gift Planning</i>	Administrative Assistant: Katherine Thomas-Tkielke	All Gift & Records Analysts: Donna Smith, Kemelya Moore, Barbara Moore, Alice Gee, Jennifer Rosas Matching Gift Coordinator: Thu-Van Nguyen
2	Reconciling cash, checks, etc. to receipts.	Gift & Records Analyst: Jennifer Rosas	All Gift & Records Analysts: Donna Smith, Kemelya Moore, Barbara Moore, Alice Gee Matching Gift Coordinator: Thu-Van Nguyen
3	Preparing deposits.		

	<i>Development</i>	Gift & Records Analyst: Donna Smith	All Gift & Records Analysts: Kemelya Moore, Barbara Moore, Alice Gee, Jennifer Rosas Matching Gift Coordinator: Thu-Van Nguyen
	<i>Corporate &amp; Foundation Relations</i>	Gift & Records Analyst: Donna Smith	All Gift & Records Analysts: Kemelya Moore, Barbara Moore, Alice Gee, Jennifer Rosas Matching Gift Coordinator: Thu-Van Nguyen
	<i>Constituent &amp; College Development</i>	Gift & Records Analyst: Donna Smith	All Gift & Records Analysts: Kemelya Moore, Barbara Moore, Alice Gee, Jennifer Rosas Matching Gift Coordinator: Thu-Van Nguyen
	<i>Annual Giving</i>	Gift & Records Analyst: Donna Smith	All Gift & Records Analysts: Kemelya Moore, Barbara Moore, Alice Gee, Jennifer Rosas Matching Gift Coordinator: Thu-Van Nguyen
	<i>Gift Planning</i>	Gift & Records Analyst: Donna Smith	All Gift & Records Analysts: Kemelya Moore, Barbara Moore, Alice Gee, Jennifer Rosas Matching Gift Coordinator: Thu-Van Nguyen
4	Preparing Journal Entries.		
	<i>Development</i>	Gift & Records Analyst: Donna Smith	All Gift & Records Analysts: Kemelya Moore, Barbara Moore, Alice Gee, Jennifer Rosas Matching Gift Coordinator: Thu-Van Nguyen
	<i>Corporate &amp; Foundation Relations</i>	Gift & Records Analyst: Donna Smith	All Gift & Records Analysts: Kemelya Moore, Barbara Moore, Alice Gee, Jennifer Rosas Matching Gift Coordinator: Thu-Van Nguyen
	<i>Constituent &amp; College Development</i>	Gift & Records Analyst: Donna Smith	All Gift & Records Analysts: Kemelya Moore, Barbara Moore, Alice Gee, Jennifer Rosas Matching Gift Coordinator: Thu-Van Nguyen
	<i>Annual Giving</i>	Gift & Records Analyst: Donna Smith	All Gift & Records Analysts: Kemelya Moore, Barbara Moore, Alice Gee, Jennifer Rosas Matching Gift Coordinator: Thu-Van Nguyen
	<i>Gift Planning</i>	Gift & Records Analyst: Donna Smith	All Gift & Records Analysts: Kemelya Moore, Barbara Moore, Alice Gee, Jennifer Rosas Matching Gift Coordinator: Thu-Van Nguyen

5	Verifying deposits posted correctly in the Finance System.	Gift & Records Analyst: Jennifer Rosas	All Gift & Records Analysts: Donna Smith, Kemelya Moore, Barbara Moore, Alice Gee Matching Gift Coordinator: Thu-Van Nguyen
6	Adequacy of physical safeguards.	Director of Gift Processing & Records: Sandra Wilkerson	Manager of Gift Processing & Records: Ronnie Calhoun
7	Transporting deposits to Student Financial Services.	UHPD	n/a
8	Ensuring deposits are made timely.		
	<i>Development</i>	Manager of Gift Processing & Records: Ronnie Calhoun	Director of Gift Processing & Records: Sandra Wilkerson
	<i>Corporate &amp; Foundation Relations</i>	Manager of Gift Processing & Records: Ronnie Calhoun	Director of Gift Processing & Records: Sandra Wilkerson
	<i>Constituent &amp; College Development</i>	Manager of Gift Processing & Records: Ronnie Calhoun	Director of Gift Processing & Records: Sandra Wilkerson
	<i>Annual Giving</i>	Manager of Gift Processing & Records: Ronnie Calhoun	Director of Gift Processing & Records: Sandra Wilkerson
	<i>Gift Planning</i>	Manager of Gift Processing & Records: Ronnie Calhoun	Director of Gift Processing & Records: Sandra Wilkerson
9	Ensuring all employees who handle cash have completed Cash Security Procedures or Cash Deposit and Security Procedures training.	Director, Finance & Business Operations: Susanne Johnston	Assistant Business Administrator: Thuan Nguyen
10	Updating Cash Handling Procedures as needed.	Director of Gift Processing & Records: Sandra Wilkerson	Manager of Gift Processing & Records: Ronnie Calhoun
11	Distribution of Cash Handling Procedures to employees who handle cash.	Manager of Gift Processing & Records: Ronnie Calhoun	Director of Gift Processing & Records: Sandra Wilkerson
12	Consistent and efficient responses to inquiries.	Manager of Gift Processing & Records: Ronnie Calhoun	Director of Gift Processing & Records: Sandra Wilkerson