

Development Operations
Baseline Standards
FY2024

Description of Responsibility	Responsible Person(s) (Name/Title)	
	Primary (Required)	Secondary (Optional)

CASH HANDLING			
1	Collecting cash, checks, etc.		
	<i>Development / VC-VP / HPM / Business Ops / DPE / Strategic Initiatives / Reporting Services / Alumni Relations</i>	Manager of Gift Processing & Records: Ronnie Calhoun	All Gift & Records Analysts: Ahn Nash, Miriam Bou Dib, Robin Lesly, Jenni Cash, Marvin Alexander, Jennifer Rosas; Matching Gift Coordinator: Thu-Van Nguyen
	<i>Corporate & Foundation Relations</i>	Executive Administrative Assistant - Allison Masaki	All Gift & Records Analysts: Ahn Nash, Miriam Bou Dib, Robin Lesly, Jenni Cash, Marvin Alexander, Jennifer Rosas; Matching Gift Coordinator: Thu-Van Nguyen
	<i>Constituent & College Development</i>	Assistant VP of University Development - Russell Dunlavy	All Gift & Records Analysts: Ahn Nash, Miriam Bou Dib, Robin Lesly, Jenni Cash, Marvin Alexander, Jennifer Rosas; Matching Gift Coordinator: Thu-Van Nguyen
	<i>Annual Giving</i>	Director of Annual Giving: Anessa Rios	All Gift & Records Analysts: Ahn Nash, Miriam Bou Dib, Robin Lesly, Jenni Cash, Marvin Alexander, Jennifer Rosas; Matching Gift Coordinator: Thu-Van Nguyen
	<i>Gift Planning</i>	Office of Gift & Estate Planning Development Coordinator - Abby Sayers	All Gift & Records Analysts: Ahn Nash, Miriam Bou Dib, Robin Lesly, Jenni Cash, Marvin Alexander, Jennifer Rosas; Matching Gift Coordinator: Thu-Van Nguyen
2	Reconciling cash, checks, etc. to receipts.	Gift & Records Analyst: Jennifer Rosas	All Gift & Records Analysts: Ahn Nash, Miriam Bou Dib, Robin Lesly, Jenni Cash, Marvin Alexander, Jennifer Rosas; Matching Gift Coordinator: Thu-Van Nguyen
3	Preparing deposits.		
	<i>Development / VC-VP / HPM / Business Ops / DPE / Strategic Initiatives / Reporting Services / Alumni Relations</i>	Gift & Records Analyst: Jennifer Rosas	All Gift & Records Analysts: Ahn Nash, Miriam Bou Dib, Robin Lesly, Jenni Cash, Marvin Alexander, Jennifer Rosas; Matching Gift Coordinator: Thu-Van Nguyen

	<i>Corporate & Foundation Relations</i>	Gift & Records Analyst: Jennifer Rosas	All Gift & Records Analysts: Ahn Nash, Miriam Bou Dib, Robin Lesly, Jenni Cash, Marvin Alexander, Jennifer Rosas; Matching Gift Coordinator: Thu-Van Nguyen
	<i>Constituent & College Development</i>	Gift & Records Analyst: Jennifer Rosas	All Gift & Records Analysts: Ahn Nash, Miriam Bou Dib, Robin Lesly, Jenni Cash, Marvin Alexander, Jennifer Rosas; Matching Gift Coordinator: Thu-Van Nguyen
	<i>Annual Giving</i>	Gift & Records Analyst: Jennifer Rosas	All Gift & Records Analysts: Ahn Nash, Miriam Bou Dib, Robin Lesly, Jenni Cash, Marvin Alexander, Jennifer Rosas; Matching Gift Coordinator: Thu-Van Nguyen
	<i>Gift Planning</i>	Gift & Records Analyst: Jennifer Rosas	All Gift & Records Analysts: Ahn Nash, Miriam Bou Dib, Robin Lesly, Jenni Cash, Marvin Alexander, Jennifer Rosas; Matching Gift Coordinator: Thu-Van Nguyen
4	Preparing Journal Entries.		
	<i>Development / VC-VP / HPM / Business Ops / DPE / Strategic Initiatives / Reporting Services / Alumni Relations</i>	Gift & Records Analyst: Jennifer Rosas	All Gift & Records Analysts: Ahn Nash, Miriam Bou Dib, Robin Lesly, Jenni Cash, Marvin Alexander, Jennifer Rosas; Matching Gift Coordinator: Thu-Van Nguyen
	<i>Corporate & Foundation Relations</i>	Gift & Records Analyst: Jennifer Rosas	All Gift & Records Analysts: Ahn Nash, Miriam Bou Dib, Robin Lesly, Jenni Cash, Marvin Alexander, Jennifer Rosas; Matching Gift Coordinator: Thu-Van Nguyen
	<i>Constituent & College Development</i>	Gift & Records Analyst: Jennifer Rosas	All Gift & Records Analysts: Ahn Nash, Miriam Bou Dib, Robin Lesly, Jenni Cash, Marvin Alexander, Jennifer Rosas; Matching Gift Coordinator: Thu-Van Nguyen

	<i>Annual Giving</i>	Gift & Records Analyst: Jennifer Rosas	All Gift & Records Analysts: Ahn Nash, Miriam Bou Dib, Robin Lesly, Jenni Cash, Marvin Alexander, Jennifer Rosas; Matching Gift Coordinator: Thu-Van Nguyen
	<i>Gift Planning</i>	Gift & Records Analyst: Jennifer Rosas	All Gift & Records Analysts: Ahn Nash, Miriam Bou Dib, Robin Lesly, Jenni Cash, Marvin Alexander, 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: Ahn Nash, Miriam Bou Dib, Robin Lesly, Jenni Cash, Marvin Alexander, Jennifer Rosas; 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 / VC-VP / HPM / Business Ops / DPE / Strategic Initiatives / Reporting Services / Alumni Relations</i>	Manager of Gift Processing & Records: Ronnie Calhoun	Director of Gift Processing & Records: Sandra Wilkerson
	<i>Corporate & Foundation Relations</i>	Manager of Gift Processing & Records: Ronnie Calhoun	Director of Gift Processing & Records: Sandra Wilkerson
	<i>Constituent & 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: Thuan Nguyen	Assistant Business Administrator: Carissa Codd
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