April 5, 2023 Coffee Chat Nuggets Donor Member Services
Topic: Donor Member Services, Glee Pavlova, gxl121@psu.edu
42 attendees

Overview:
25 full-time positions now fully staffed. New Director in October Lori Catalano. Tina Cigich is associate director. Missy Garvin assistant director for membership. Heather Fornicola, Corrie VonGunden accounting managers

What DMS does:
1) recording charitable giving to the University, at peak giving times other tasks done when there is time, coding and processing of gifts are priority. Recording gifts: obligated to record the gift on the name that appears on the check, (i.e. business account will get primary credit and donor will get associated credit if check comes from the business account)
2) Coding all alumni association memberships
3) Biographical maintenance of AWA records (currently 850,000 records)
4) Answering phone calls from donors and alumni association members

What DMS doesn't do:
1) Don't pull lists of any type- this is a DDAR selects function
2) Don't maintain prospect records-PTMS does this
3) no coding of gift club or affinity codes
4) Don't delete or edit contact reports- Prospect management and analytics does this
5) Don't update email lists
6) Don't handle solicitation controls- Annual Giving does this
7) Can't accept gifts from government agencies as a charitable gift. It will be recorded as another type of gift. Corrie Von Gunden can help with these questions

Important email addresses:
--Alumni address is good starting point for questions: alumni-address@psu.edu
Biographical updates should be sent here as well, also report duplicate records to this email be sure to include backup
--Deceased entities: Obituaries@psu.edu, include AWA number in subject line and include link to Obituary. Also deceasing entities form can be used.
--Gift Match: PSUGiftMatch@psu.edu, Jodi Snook coordinates this

**Gift Fund: GL: 26005000; Bus: 6310; Fund: 9900000028:   all charitable giving placed here and then allocated out to specific funds using allocation codes. Seat payments to Nittany Lion Club not considered charitable.

**Incorrect deposits: cac20@psu.edu, Corrie Von Gunden and hml2@psu.edu, Heather Fornicola. Please include both Corrie and Heather on inquiries and send as much backup as possible.

**Entity updates done using entity update tool:
 DMS doesn't see what was updated in the automated system. If you need other corrections include those in comments box. Include specific details for updating, DMS sees the comments box from the automated system.
 Can also use alumni-address@psu.edu to get help on updating entities.

Adding children to an entity record: contact alumni-address@psu.edu

**Penn State Philanthropic Fund:
Same physical address as Donor and Member Services
 2583 Gateway Drive-Ste 130
 State College PA 16801
Tax exemption letter found here: Research.psu.edu/PSU_tax_exempt_status_letter

**Expecting Gifts from a Foundation or IRA- please let DMS know with as much detail as possible so they can match gift with donor once it arrives especially if sent directly to DMS. Include emails from donors explaining detail for gifts. Send this information to Corrie and Heather.

**Gift reports on Edds shows source of giving, you can sort by dates (always one day delayed)

**A record is marked inactive when they don't have a valid mailing address. They can still receive emails.

** For additional information please see the Resources page: DMS Helpful Contacts, Deceasing Form and Mass Add Format