

## **AGENDA**

**SLU Business Manager Meeting  
June 12, 2008  
Medical School Lecture Hall A  
9:00a.m.-10:30a.m.**

- 1) Meeting Overview/Announcements**
  - **Sign in Sheet**
  - **Review of March and April 'What's New?'**
- 2) Online Training Resources – Keith Emge (15 minutes)**
- 3) Google Apps. Overview – Jim Greathouse (25 minutes)**
- 4) Budget Roll Update – Eric Lewis (10 minutes)**
- 5) Q & A**

## Business Manager Meeting

### Minutes of the Meeting of June 12, 2008

Meeting minutes of the Saint Louis University Business Managers held at 9:00 a.m. on Thursday, June 12, 2008 at the Medical School Lecture Hall A.

#### Business & Finance Staff Present:

Janice Crawford	Bruce Andres	Mary Gavach
Gary Whitworth	Sharon Gajewski	Greg Haney
Tom Meadows	Eric Lewis	Keith Emge
Michael Lucido	Marsha McBride	
Linda Pizzo	Lisa Zoia	

#### Number of Business Managers Present: 62

Keith Emge welcomed everyone to the meeting. He also announced the addition to the agenda, and made the introduction of Amanda Rainey. Also, the "What's New" newsletter will continue to be sent out monthly with updates. Any important changes/updates will be sent out immediately by email.

**What's New Review** - Keith Emge reviewed the May and June issues of "[What's New](#)".

**In the May issue** – Keith mentioned the hints on FY09 Purchase Orders. New updates on Procurement Cards and also that it is going to be mandatory for every department to have one come July 1, 2008. He also spoke of the updates for the AMEX Travel and Entertainment card, as well as shopping procedures for Wal-Mart and Sam's Club. Finally, Keith mentioned the Requisition tutorials that are available to view and a reminder on the Chaifetz Parking for events.

**In the June issue** – Keith then mentioned the articles in the June issue of 'What's New?' starting with Online Training Resources that would be mentioned earlier. Next, he spoke of the updates from the Travel Department and other articles pertaining to those. Then, Keith touched on the new P-Card Vendor list that was sent out by Business Services, and ended the 'What's New?' articles with an update on the eSeeIDO process that would be mentioned further in the following presentation.

**Online Training Resources Webpage** – Keith Emge linked to the Business and Finance website to go directly to the [Online Training](#) site to talk about manuals and tutorials. Keith discussed the main purposes of the manuals and tutorials and the desire for the tutorials to replace the in-class training that the department currently offers. Also, he mentioned that if there is any need for technical assistance to please contact him at 977-2228.

**Google Apps.** – Jim Greathouse was kind enough to present to the Business Managers on the new Google Apps. interface that will be rolled out on June 18<sup>th</sup>. Jim talked about the positive aspects of the new interface like the increased space – from 6 MB of space to 6 GB, and many others as well like not having to buy new hardware to update the system. He also stressed the difference between Google Apps. and another Google-operated email system, Gmail. There were a few questions and issues that were addressed by Jim, and he was able to answer most of the questions but there were some that he said should be directed towards the [ITS help desk](#). Directly after his presentation Keith stated that if there was anyone who had questions that was not answered by Jim could stay after the meeting to record them and see if they can be taken care of by ITS or someone who is knowledgeable about the system.

**Budget Roll** – Eric Lewis presented information on the FY09 Budget Roll and the year-end reminders. Eric stated that the Budget Roll process is slated to begin on or about July 1, 2008 for salaries and mid-July for Finance Budgets. As in the past, Financial Planning and Budget will not be able to process budget revisions during this time. There was a brief discussion about EPAFs and the submission of FY09 EPAFs. He also stated that people please submit the remainder of your critical FY08 budget revisions to Financial Planning and Budget ***no later than close of business on Friday, June 20, 2008***. If you have any questions, please do not hesitate to contact Stacy Barfield Harrington (977-3938), Bruce Andres (977-7073) or Eric Lewis (977-2891).

**Giving and Acknowledgement** – Amanda Rainey spoke to the Business Managers about donors giving to the University and that these gifts should go directly through the Development office and not directly to the department to which this gift is going to. She described the difference between a charitable gift and a non-charitable gift. Amanda also mentioned that if a gift is coming from a certain department or donor to the Development office that they should write the details or description of where it should go to on the check. Lastly, Amanda mentioned how her department also thanks the donors, and that if we have any questions we can call or email her at 977-2843 or [raineyal@slu.edu](mailto:raineyal@slu.edu).

Please check the [meeting schedule](#) for the location of all future meetings.  
The meeting was adjourned close to 10:15 a.m.

Minutes respectfully submitted by Keith Emge.

## FY09 Budget Roll and FY08 Year-end Reminders

### **FY09**

- The Budget Roll process is slated to begin on or about July 1, 2008 for salaries and mid-July for Finance Budgets. As in the past, Financial Planning and Budget will not be able to process budget revisions during this time.
- Due to the timing of the first payroll for FY09, you should be able to view your FY09 budgets in [Banner Self Service-Finance](#) by Monday, July 21, 2008.
- The job information entered into Salary Planner this spring will override all EPAFs that have been applied and which have an effective date of July 1, 2008.
- All EPAFs applied after the budget roll is completed and which have an effective date after July 1st will override the information downloaded from Salary Planner, and could result in erroneous pay to monthly (salaried) employees.
- If an employee has received a pay change since the Salary Planner screens have closed, please contact Financial Planning and Budget to verify their FY09 proposed annual salary and so we can make the appropriate changes.
- Please pay close attention to the upcoming EPAF deadlines that are published in the [FY09 Payroll Calendars \(under Other Information\)](#). Although this should not be necessary, if you have to submit a correction via EPAF please do so within the appropriate July payroll deadlines.
- Financial Planning & Budget will correct all pay rates below minimum wage by entering \$6.65 in the employee's hourly rate in Salary Planner on June 26<sup>th</sup> unless otherwise resolved by the department prior to June 25<sup>th</sup>.

### **FY08**

- Please submit the remainder of your **CRITICAL** FY08 budget revisions to Financial Planning and Budget ***no later than close of business on Friday, June 20, 2008.***

Please share this information with others in your department that may be affected by these deadlines. If you have any questions, please do not hesitate to contact Stacy Barfield Harrington (977-3938), Bruce Andres (977-7073) or Eric Lewis (977-2891).

Thank you in advance for your cooperation and attention to this process.

Financial Planning & Budget Office

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# Working with Advancement



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# What counts as a charitable gift?

- ❑ Personal property (*books, equipment, artwork*)
- ❑ Cash, checks NOT related to event revenue/fees
- ❑ Stocks, securities
- ❑ Bequests



# What is NOT a charitable gift

- ❑ Personal property that you can't use
- ❑ Cash, checks related to registration fees, services, etc.
- ❑ "Donation of time"



**All charitable gifts must  
be processed through  
Advancement**





# Benefits of Advancement processing gifts

1. Less work for you!
2. Auto-generated acknowledgement letter & tax receipt
3. Inclusion in university-wide donor recognition programs
4. Donor history, tendencies can be tracked universally



# When you get a gift...

## Gifts totaling under \$100

- ❑ Request a locked cash bag from cashier/business office
- ❑ Place check/cash and all supporting materials in bag.
- ❑ Send via campus mail to:

Sr. Linda Markway  
Development Services  
DuBourg Hall 319



# When you get a gift...

## Gifts over \$100

- ☐ Call your unit's development team for personal pick up and drop off
- ☐ Place check/cash and all supporting materials in a sealed envelope.



# **“But the donor wants the money to come to us”**

## **Donor must**

- ❑ Write the intent on the check
- ❑ Put request in writing accompanying the check



# Thanking the donors

- ☐ Advancement → universal acknowledgement/tax receipt
- ☐ Dean's Offices → additional thank you
- ☐ Student Phoners
- ☐ DuBourg Society
- ☐ Stewardship Program



# Questions?

**Amanda Rainey**  
Director of Stewardship

DB 310

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