

Vice Chancellor for University Advancement
Annual Giving

210.01 SIUE Fundraising Day Donor Files

Dates: 2006-
Volume: 2 Cubic Feet
Annual Accumulation: Negligible
Arrangement: Alphabetical

This record series consists of faculty, staff and community solicitations to donate to the University on SIUE fundraising day. The files include lists of participants and community attendees, solicitation pieces, correspondence and statistics on donor giving.

Recommendation: Retain in office for three (3) years, then transfer to the University Archives for permanent retention.

Disposition approved 2/16/11

210.02 Direct Mailings Files

Dates: 1996-
Volume: 2 Cubic Feet
Annual Accumulation: Negligible
Arrangement: Alphabetical and Chronological

This record series consists of the direct mailing program which is performed in the fall, winter and spring. The file includes mailing lists, monthly/annual donor reports, mailing copies, and annual statistics.

Recommendation: Retain in the Foundation Office for five (5) years, then destroy mailing lists in a secure manner provided all audits have been completed, if necessary, and no litigation is pending or anticipated. The remainder of the record series is to be retained permanently in the Foundation Office.

Disposition approved 2/16/11

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210.03 Phone Campaign Files

Dates: 2001
Volume: 6 Cubic Feet
Annual Accumulation: Negligible
Arrangement: Alphabetical

This record series consists of files compiled during the phone campaigns implemented throughout the year. The files include annual records of solicited calls, pledges' and donors' daily/monthly/annual reports, and calling statistics.

Recommendation: Retain in the office for ten (10) years, then destroy in a secure manner provided all audits have been completed, if necessary, and no litigation is pending or anticipated.

Disposition approved 2/16/11

210.04 Meridian Society Scholarship Files

Dates: 2004-
Volume: 2 Cubic Feet
Annual Accumulation: Negligible
Arrangement: Chronological

This record series consists of files related to the Meridian Society scholarship. The Meridian Society is a women's philanthropic organization dedicated to supporting SIUE while learning more about financial and estate planning issues. The files include membership lists, copies of applications submitted, copies of award receipts, copies of meeting minutes, subcommittee/workshop meeting minutes, Board of Directors meeting minutes, event photos, and copies of any printed materials.

Recommendation: Retain in office permanently.

Disposition Approved 02/16/11

210.05 Monthly Giving Reports

Dates: 1996-
Volume: 4 Cubic Feet
Annual Accumulation: Negligible
Arrangement: Chronological

This record series consists of reports which are compiled monthly. The report includes giving and pledge statistics by mailings and phone campaigning. These reports are compiled to be included in the Annual Report to the Foundation.

Recommendation: Retain in office for five (5) years, then dispose of provided all audits have been, if necessary, and no litigation is pending or anticipated.

Disposition approved 2/16/11

210.06 Student Call Center Reports

Dates:	2001-
Volume:	Negligible
Annual Accumulation:	Negligible
Arrangement:	Chronological

This record series consists of reports compiled by the Student Call Center. The reports include the number of prospects, contacts, completed calls, pledges and total hours.

Recommendation: Retain in office for ten (10) years, then dispose of provided all audits have been completed if necessary, and no litigation is pending or anticipated.

Disposition approved 2/16/11

210.07 Centralized Solicitation Letters & Scripts

Dates:	2001-
Volume:	negligible
Annual Accumulation:	Negligible
Arrangement:	Chronological

This record series consists of solicitation letters and scripts used by Alumni Association personnel for direct mailings and phone campaigns.

Recommendation: Retain in office three (3) years, then dispose of provided all audits have been completed, if necessary, and no litigation is pending or anticipated.

Disposition approved 2/16/11

Application 07-13

210.08 Annual Giving Program Codes, Comments, and Changes Index Files

Dates:	1973-
Volume:	Negligible
Annual Accumulation:	Negligible
Arrangement:	Chronological

This record series consists of an index of various codes used to chart donations.

Recommendation: Retain in office until superseded by the new index, then dispose of provided all audits have been completed, if necessary, and no litigation is pending or anticipated.

Disposition approved 2/16/11