

Vice Chancellor for University Advancement

Office of the Vice Chancellor

100.01 Development Officers' Files

Date: 1988
Volume: 4 Cubic Feet
Annual Accumulation: Negligible
Arrangement: Alphabetical

This record series consists of the names of the University Development officers; items of historical significance (e.g. record of major donations); record of length of time served in office; and donor's giving history (e.g. total amounts donated).

Recommendation: Retain in office for five (5) years after date of last employment, then with the assistance of the University Archives staff, review the series and transfer any documents possessing archival value to the University Archives for permanent retention and dispose of all routine materials.

Disposition Approved 02/16/11

100.02 Annual Report to the Foundation

Date: 1988-
Volume: 1 Cubic Foot
Annual Accumulation: Negligible
Arrangement: Chronological

This record series consists of an annual narrative report on the overall financial condition of the SIUE Foundation.

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

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Disposition Approved 02/16/11

100.03 Major Gift Campaign Files

Dates: 2006-

Volume: 2 Cubic Feet

Annual Accumulation: Negligible

Arrangement: Chronological

This record series consists of documents related to the major capital campaign for the University. The files include pledge forms, scholarship documents, faculty member campaign rolls, and other related campaign documents. The files date from the planning and establishment of the campaign to the final donor list.

Recommendation: Retain in office five (5) years, after final donor list is compiled, then transfer to the University Archives. University Archives staff will review files and dispose of all routine documents. Any remaining accumulation will be retained permanently in the University Archives.

Disposition Approved as Amended 02/16/11

100.04 Fund Raising Campaign Files

Dates: 1978-

Volume: 64 Cubic Feet

Annual Accumulation: 2 Cubic Feet

Arrangement: Chronological

This record series consists of the documents related to the daily fund-raising operations and campaigns by the Annual Giving Department. The file includes donor lists, mailing lists, and call center activity and statistics.

Recommendation: Retain in office five (5) years, then transfer to the University Archives for permanent retention. University Archives staff will review files and dispose of all routine documents. Any remaining accumulation will be retained permanently in the University Archives.

Disposition approved as amended 2/16/11

100.05 University Foundation and Alumni Board Founders Files

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

This record series consists of the Articles of Incorporation, by-laws, and Internal Revenue Service exemption determination and related correspondence.

Recommendation: Retain in office permanently.

Disposition Approved 02/16/11

100.06 University Foundation and Alumni Board Conflict of Interest Disclosure Forms

Dates: 1998
Volume: 1 Cubic Feet
Annual Accumulation: Negligible
Arrangement: Alphabetical

This record series consists of "conflict of interest disclosure" forms signed by the Foundation and Alumni board members.

Recommendation: Retain in office for six (6) years, then dispose of provided all audits have been completed, if necessary, and no litigation is pending or anticipated.

Disposition Approved 02/16/11

100.07 Strategic Development Plan

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

This record series consists of documents which explain the past, present, and future development plans

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and operations devised by the University Advancements' staff. This plan has staffing projections, fund-raising campaign ideas, and other related activities to support University functions and mission.

This plan is added to the University's Strategic Development Plan.

Recommendation: Retain in office two (2) years, then transfer to the University Archives for permanent retention.

Disposition Approved 02/16/11

100.08 University Foundation and Alumni Board Contracts

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

This record series consists of signed personnel contracts by board members.

Recommendation: Retain in office for ten (10) years after the member's last board meeting, then dispose of in a secure manner, provided all audits have been completed, if necessary, and no litigation is pending or anticipated.

Disposition Approved as Amended 02/16/11