

Special Schedule #2**Records of Gift and Estate Planning**

The Office of Gift and Estate Planning deals with fundraising and the stewardship of donors and potential donors. The Office includes planned, or deferred giving. Advancement Services, which reports to the Office of Gift and Estate Planning, handles the collection, storage, retrieval, input and analysis of information accumulated in dealing with alumni, parents, trustees, and friends of the College. The title, Office of Gift and Estate Planning, is a hold-over from the original title of the current Associate Vice President of Major Gifts, Director of Gift and Estate Planning, but it is now only partially descriptive of the functions and activities that occur in the office.

Within the Office of Gift and Estate Planning are five positions, including Associate Vice President of Major Gifts, 2 Directors of Development, Administrative Secretary for Development, and Administrative Secretary for Gift and Estate Planning.

GENERAL FILES. The files include College publications, annual budgets/audits, and other reference materials.

ADMINISTRATIVE FILES. The files include official correspondence and other working documents concerning the activities of the office.

Description	Retention Period	Disposition
Electronic Documents	Depends on subject (See following descriptions)	Depends on subject
Annual Budgets	5 years	Destruction
Audits/Audit Questions	5 years/Until resolved	Destruction

Description	Retention Period	Disposition
Correspondence		
General/Subject Files (Communication that documents the planning, implementation, and evaluation of the major activities, functions, projects and programs of the office. This communication has historical, long-term value.)	Permanent	Archives
Routine Files (General inter/intra and non-institutional office communication that deals with the operation of a campus until and its personnel. This communication can be in the form of notes, memos, or letters that have no historical value, only short-term value.)	1 year	Destruction
Internal Reports/Special Studies		
Official Copy	Permanent	Archives
Office Copy	Reference Value Period	Destruction
Meeting Minutes	Permanent	Archives
Planning Files	Reference Value Period	Destruction
Policy and Procedure Statements		
Office Copy	Until Superseded	Destruction
Official Copy	Permanent	Archives
College Publications		
Office Copy	Reference Value Period	Destruction
Official Copy (GEP is creator)	Permanent	Archives

Disposition Instructions: Maintain in office one year current and one year past, transfer inactive files (i.e., records with retention periods beyond 1-2 years) to Mudd attic cage for eventual appraisal and disposition; transfer materials for permanent retention to the College Archives. Destroy in office when life cycle of the document ends.