



Agency Records Disposition Schedule

Department: Department of Higher Education and Workforce
Development

Section: Development

Division: University General Retention Schedule

Sub-Section:

TITLE: Appreciated Securities

CUTOFF: EOSFY

DESCRIPTION: Documentation of stocks, bonds, and mutual funds. Records include, but are not limited to, gift and donation agreements, acknowledgement letters, financial reports, and records required by 173.275 RSMo.

RETENTION: Years: 10 Months: 0 Days: 0

NOTES:

DISPOSITION ACTION: Permanent - Transfer to appropriate archives

SERIES: 24223

SERIES STATUS: Approved

APPROVAL DATE: 11/15/2016

TITLE: Capital Campaigns

CUTOFF: End of campaign

DESCRIPTION: Documentation of an institution's efforts to raise significant funds within a given time frame for a defined project. Records include, but are not limited to, programs, correspondence, budgets, and appropriations. Records may include documentation related to 173.480 RSMo.

RETENTION: Years: 10 Months: 0 Days: 0

NOTES:

DISPOSITION ACTION: Permanent - Transfer to appropriate archives

SERIES: 24218

SERIES STATUS: Approved

APPROVAL DATE: 11/15/2016

TITLE: Donor Information

CUTOFF: WSO

DESCRIPTION: Documentation of previous and potential donors. Records include, but are not limited to, contact information, biographical information, and correspondence.

RETENTION: Years: 5 Months: 0 Days: 0

NOTES:

DISPOSITION ACTION: Destroy

SERIES: 24221

SERIES STATUS: Approved

APPROVAL DATE: 11/15/2016



Agency Records Disposition Schedule

Department: Department of Higher Education and Workforce
Development
Division: University General Retention Schedule

Section: Development
Sub-Section:

TITLE: Gifts and Donations

CUTOFF: EOSFY

DESCRIPTION: Documentation of gifts and donations to the institution. Records include, but are not limited to, gift and donation agreements, acknowledgement letters, correspondence, and donor information. Records created per 173.275 RSMo. and Section 170(f)(17) of the Internal Revenue Code.

RETENTION: Years: 10 Months: 0 Days: 0

NOTES: Acknowledgement letters required for donations/gifts over \$250.

DISPOSITION ACTION: Permanent - Transfer to appropriate archives

SERIES: 24219

SERIES STATUS: Approved

APPROVAL DATE:

11/15/2016

TITLE: Investments and Trust Funds

CUTOFF: EOFFY

DESCRIPTION: Documentation related to the management and administration of the institution's investments and trusts. Records include, but are not limited to, annual reports, tax reports, and audits.

RETENTION: Years: 6 Months: 0 Days: 0

NOTES:

DISPOSITION ACTION: Permanent - Transfer to appropriate archives

SERIES: 24222

SERIES STATUS: Approved

APPROVAL DATE:

11/15/2016

TITLE: Planned and Major Gifts

CUTOFF: EOSFY

DESCRIPTION: Documentation of bequests, endowments, life insurance, and assets to the institution. Records include, but are not limited to, gift and donation agreements, acknowledgement letters, financial reports, and records required by 173.275 RSMo.

RETENTION: Years: 10 Months: 0 Days: 0

NOTES:

DISPOSITION ACTION: Permanent - Transfer to appropriate archives

SERIES: 24220

SERIES STATUS: Approved

APPROVAL DATE:

11/15/2016