

DEPARTMENT OF GENERAL SERVICES
 RECORDS MANAGEMENT DIVISION
 RECORDS RETENTION AND DISPOSAL SCHEDULE

Item No.	Description	Retention
1.	<p>General Files (Alpha, Subject, Administrative and Chronological Correspondence) Includes internal and external correspondence, original incoming and outgoing correspondence, reports, memoranda, statistics, proposed programs, minutes, policy and procedure statements, special projects, and substantive data concerning the operation of the Institutional Advancement Office.</p>	<p>Screen annually and destroy that material for which no further reference is required. Remaining material having continuing administrative or legal value related to the development of the agency to be microfilmed or kept in paper by the Institutional Advancement Office for 25-year retention, then destroy. (Material having historical value to be sent to the Records Archives at the institution for permanent retention).</p>
2.	<p>Donor (Gift) Files: These are records which show name, date, amount, receipt and account number, and related data including gift envelope and receipt), on all gifts donated to the System by friends, alumni, corporations, associations, or foundations.</p>	<p>Retain gift envelope until audit is complete, then destroy. Remaining material having historical value to be microfilmed by the Office of the Record for permanent retention.</p>
3.	<p>Endowment Fund Records: Ledgers, journals, vouchers, bank statements, reports to the Regents and dividend reports which document endowment fund transactions. Includes endowments for the Humanities (both Maryland and national)</p>	<p>Retain permanently either in paper or microfilm form.</p>
4.	<p>Search Committee Files: Search Committee materials for faculty, administrators, and associate staff. Consists of advertisements, final recommendation of the committee, includes meeting minutes containing final recommendation data, voting results, top candidate résumés (top 5 or 10 only), and all information on appointed candidate.</p>	<p>Retain for 5 years (if chair/search committee or department are responsible for the search), then destroy.</p>
5.	<p>Capital Campaign - fundraising effort over a long period</p>	<p>Retain permanently either in paper or microfilm</p>

of time with specific monetary goal in mind.

Division/Unit: Institutional Advancement / *Alumni*

6.	Sponsored Programs (specifically U.S. government, Title III & Grants)	Retain state contracts and grants to 3 years after the close of the contract, and federal contracts/grants under \$25,000 for 3 years and over \$25,000 for 6 years smonths after close of contract, then destroy.
7.	Alumni Files: Includes general correspondence, events and project files, reunion files, newsletter, and alumni cultivation files.	Screen annually and destroy material for which no further reference is required. Remaining material having continuing administrative, legal, value pertaining to the development of the agency to be microfilmed or kept in paper by the Institutional Advancement Office for 15 year retention, then destroy. Historical material keep
8.	Special Project Files: Contains correspondence, records of negotiations, legal agreements and working papers relating to efforts to preserve certain "collections"	Screen annually and destroy material for which no further reference is required. Material having continued historical value to be retained permanently in institutional archives (or State Archives if institution does not have appropriate archival facilities.) Keep legal
9.	LIBRARY DONOR FILES: Correspondence, gift agreements, collection inventories, processing notes, publicity materials, and working papers documenting the gift of library materials by outside donors to units within the library system. Research notes, correspondence, and copies of gift receipts relating to the library. Includes files on individual donors, special projects, and prospective donors.	Retain permanently in library in paper form. *or State Archives if appropriate archival facilities are not available. Retain for 10 years after file is declared inactive, then destroy.
10.	Other Work Orders	Retain in the Institutional Advancement Office for 3 years (if generated by this office). then

perma-
material
destroy.

Approved by Department, Agency, or Division Representative. Date: <u>2/27/98</u> Signature: <u>Kathleen Rodkey</u> Type Name: <u>Kathleen Rodkey</u> Title: <u>Records Management Specialist</u>	Schedule Authorized by State Archivist. Date: <u>MAR 19 1998</u> Signature: <u>Edward C. Saperstone Jr</u>
--	--

DGS 550-1A (rev. 10/92)

*Until audit requirements are met means three years for state related documents, three years for non-monetary federal related documents, three years for monetary federal related documents under \$25,000, and 6 years, 3 months for monetary federal related documents over \$25,000.

* If Salisbury State University archives are not available, material having permanent retention will be transferred to the Maryland State Archives in Annapolis and material having limited retention (i.e. 25 years) will be transferred to the State Records Center in Jessup.

I have read this schedule and it is complete and correct to the best of my knowledge

K. Rodkey Signature Edward C. Saperstone Jr Position 5-6-92 Date

Agency Records Inventory

INSTRUCTIONS: PLEASE TYPE OR PRINT A SEPARATE FORM FOR EACH NEW OR REVISED RECORD SERIES. FORWARD WITH RECORDS RETENTION SCHEDULE

1. DEPARTMENT/AGENCY Salisbury State University	2. DIVISION Institutional Advancement	3. UNIT Development/Alumni
DEFINITION - Record Series - A group of related records normally filed and used as a unit for reference as well as retention and disposition purposes.		
4. Record Series Title: General Files	5. Earliest Year/Latest Year 1986 to Present	
6. Record Series Description (Briefly describe the types of information/documents/forms found in the series. Include the purpose or function of the series.) Incoming/outgoing correspondence, reports, memoranda, statistics, minutes, policies and procedures, proposed programs, special events, projects, and substantive data concerning the operations of the Office of the SSU Foundation and Institutional Advancement.		
7. Record Series Format(s) <input checked="" type="checkbox"/> Letter size <input type="checkbox"/> Microfilm <input checked="" type="checkbox"/> Legal Size <input type="checkbox"/> Computer Tape <input type="checkbox"/> Bound Book <input checked="" type="checkbox"/> Floppy Disk <input type="checkbox"/> Audio Tape <input type="checkbox"/> Video Tape <input type="checkbox"/> Other (specify) _____	8. Record Series Sequence <input checked="" type="checkbox"/> Alphabetical <input type="checkbox"/> Numerical <input checked="" type="checkbox"/> Chronological <input type="checkbox"/> Geographical <input type="checkbox"/> Other (specify) _____	9. Volume <input checked="" type="checkbox"/> File Drawer <input type="checkbox"/> Microfilm reel (s) <input type="checkbox"/> Computer Tape (s) <input type="checkbox"/> Other (specify) _____ 10. Annual Accumulation <input checked="" type="checkbox"/> File Drawer <input type="checkbox"/> Microfilm reel (s) <input type="checkbox"/> Computer Tape <input type="checkbox"/> Other (specify) _____
11. File is used <input checked="" type="checkbox"/> Daily <input type="checkbox"/> Weekly <input type="checkbox"/> Monthly	12. File becomes inactive after see below <u>1</u> <input type="checkbox"/> Month (s) <input type="checkbox"/> Year (s) #18 for number exceptions	
13. Current Location (Building, Floor, Room) Alumni Relations: 1st floor AH Development: 2nd floor AH Archives located in supply room	14. Is record series duplicated elsewhere? (If yes, specify agency of office.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
15. Access Restrictions <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (if yes, cite law(s) and regulation(s))	16. Audit Requirements <input type="checkbox"/> None <input checked="" type="checkbox"/> State <input type="checkbox"/> Federal <input checked="" type="checkbox"/> Independent	
17. Is an index system used? (If yes, explain briefly and describe any hardware/software) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	18. Recommended Retention Screen after 1 year, destroy. Material having adm./legal value, retain for 25 years, then destroy. Any found historical material keep permanently in archives.	
19. Name and Title of Preparer Melanie Stefursky Administrative Assistant II Melinda Khazeh	20. Telephone Number (410) 543-6176 (410) 543-6042	21. Date July 29, 1996

Agency Records Inventory

INSTRUCTIONS: PLEASE TYPE OR PRINT A SEPARATE FORM FOR EACH NEW OR REVISED RECORD SERIES. FORWARD WITH RECORDS RETENTION SCHEDULE

1. DEPARTMENT/AGENCY Salisbury State University	2. DIVISION Institutional Advancement	3. UNIT Development/Alumni
DEFINITION - Record Series - A group of related records normally filed and used as a unit for reference as well as retention and disposition purposes.		
4. Record Series Title: Donor (Gift) Files	5. Earliest Year/Latest Year 1984 to present	
6. Record Series Description (Briefly describe the types of information/documents/forms found in the series. Include the purpose or function of the series.) All gifts received from donors in the ADS system; ADS printouts. Pledge and gift transmittals reflecting name of donor, date, amount, purpose of gift, fund/account; data on donor; acknowledgements; correspondence to/from donor; memorandum(s) of understanding; proposals; check requests; agreements/contracts/legal documentation.		
7. Record Series Format(s) <input checked="" type="checkbox"/> Letter size <input type="checkbox"/> Microfilm <input checked="" type="checkbox"/> Legal Size <input type="checkbox"/> Computer Tape <input type="checkbox"/> Bound Book <input type="checkbox"/> Floppy Disk <input type="checkbox"/> Audio Tape <input type="checkbox"/> Video Tape <input type="checkbox"/> Other (specify) ADS; computer printouts	8. Record Series Sequence <input checked="" type="checkbox"/> Alphabetical <input type="checkbox"/> Numerical <input checked="" type="checkbox"/> Chronological <input type="checkbox"/> Geographical <input type="checkbox"/> Other (specify)	9. Volume <input checked="" type="checkbox"/> File Drawer <input type="checkbox"/> Microfilm reel (s) <input type="checkbox"/> Computer Tape (s) <input checked="" type="checkbox"/> Other (specify) ADS (database)
10. Annual Accumulation <input checked="" type="checkbox"/> File Drawer <input type="checkbox"/> Microfilm reel (s) <input type="checkbox"/> Computer Tape <input checked="" type="checkbox"/> Other (specify) ADS		
11. File is used <input checked="" type="checkbox"/> Daily <input type="checkbox"/> Weekly <input type="checkbox"/> Monthly	12. File becomes inactive after PERMANENT _____ <input type="checkbox"/> Month (s) <input type="checkbox"/> Year (s) number	
13. Current Location (Building, Floor, Room) Alumni Relations: 1st floor AH Development: 2nd floor AH Archives in supply room Foundation Accounting	14. Is record series duplicated elsewhere? (If yes, specify agency of office.) <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Foundation Accounting	
15. Access Restrictions <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (if yes, cite law(s) and regulation(s))	16. Audit Requirements <input type="checkbox"/> None <input checked="" type="checkbox"/> State <input type="checkbox"/> Federal <input checked="" type="checkbox"/> Independent	
17. Is an index system used? (If yes, explain briefly and describe any hardware/software) ADS <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	18. Recommended Retention Gift envelope until audit is complete Permanently for historical material.	
19. Name and Title of Preparer Melanie Stefursky Administrative Assistant II	20. Telephone Number (410) 543-6176	21. Date July 29, 1996

Agency Records Inventory

INSTRUCTIONS: PLEASE TYPE OR PRINT A SEPARATE FORM FOR EACH NEW OR REVISED RECORD SERIES. FORWARD WITH RECORDS RETENTION SCHEDULE

1. DEPARTMENT/AGENCY Salisbury State University	2. DIVISION Institutional Advancement (N/A to Alumni Relations)	3. UNIT Development Relations
DEFINITION - Record Series - A group of related records normally filed and used as a unit for reference as well as retention and disposition purposes.		
4. Record Series Title: Endowment Fund Records	5. Earliest Year/Latest Year 1989 to present	
6. Record Series Description (Briefly describe the types of information/documents/forms found in the series. Include the purpose or function of the series.) Ledgers, journals, vouchers, bank statements, reports to the Regents, dividend reports documenting endowment fund transactions; legal agreements/contracts, Memorandum(s) of Understanding; data on donor.		
7. Record Series Format(s) <input checked="" type="checkbox"/> Letter size <input type="checkbox"/> Microfilm <input checked="" type="checkbox"/> Legal Size <input type="checkbox"/> Computer Tape <input type="checkbox"/> Bound Book <input type="checkbox"/> Floppy Disk <input type="checkbox"/> Audio Tape <input type="checkbox"/> Video Tape <input checked="" type="checkbox"/> Other (specify) ADS	8. Record Series Sequence <input checked="" type="checkbox"/> Alphabetical <input type="checkbox"/> Numerical <input checked="" type="checkbox"/> Chronological <input type="checkbox"/> Geographical <input checked="" type="checkbox"/> Other (specify) ADS	9. Volume <input checked="" type="checkbox"/> File Drawer <input type="checkbox"/> Microfilm reel (s) <input type="checkbox"/> Computer Tape (s) <input type="checkbox"/> Other (specify) 10. Annual Accumulation <input checked="" type="checkbox"/> File Drawer <input type="checkbox"/> Microfilm reel (s) <input type="checkbox"/> Computer Tape <input type="checkbox"/> Other (specify)
11. File is used <input checked="" type="checkbox"/> Daily <input type="checkbox"/> Weekly <input type="checkbox"/> Monthly	12. File becomes inactive after PERMANENTLY _____ number <input type="checkbox"/> Month (s) <input type="checkbox"/> Year (s)	
13. Current Location (Building, Floor, Room) 2nd floor Alumni House: Development Archives in supply room	14. Is record series duplicated elsewhere? (If yes, specify agency of office.) <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Foundation Accounting	
15. Access Restrictions <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (if yes, cite law(s) and regulation(s))	16. Audit Requirements <input type="checkbox"/> None <input checked="" type="checkbox"/> State <input type="checkbox"/> Federal <input checked="" type="checkbox"/> Independent	
17. Is an index system used? (If yes, explain briefly and describe any hardware/software) <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No ADS	18. Recommended Retention Permanently	
19. Name and Title of Preparer Melanie Stefursky Administrative Assistant II	20. Telephone Number (410) 543-6176	21. Date July 29, 1996

Agency Records Inventory

INSTRUCTIONS: PLEASE TYPE OR PRINT A SEPARATE FORM FOR EACH NEW OR REVISED RECORD SERIES. FORWARD WITH RECORDS RETENTION SCHEDULE

1. DEPARTMENT/AGENCY Salisbury State University	2. DIVISION Institutional Advancement (N/A to Alumni Relations)	3. UNIT Development
DEFINITION - Record Series - A group of related records normally filed and used as a unit for reference as well as retention and disposition purposes.		
4. Record Series Title: Search Committee Files	5. Earliest Year/Latest Year 1986 to present	
6. Record Series Description (Briefly describe the types of information/documents/forms found in the series. Include the purpose or function of the series.) Resumes, personnel information, application, personal data.		
7. Record Series Format(s) <input checked="" type="checkbox"/> Letter size <input type="checkbox"/> Microfilm <input checked="" type="checkbox"/> Legal Size <input type="checkbox"/> Computer Tape <input type="checkbox"/> Bound Book <input type="checkbox"/> Floppy Disk <input type="checkbox"/> Audio Tape <input type="checkbox"/> Video Tape <input type="checkbox"/> Other (specify) _____	8. Record Series Sequence <input checked="" type="checkbox"/> Alphabetical <input type="checkbox"/> Numerical <input type="checkbox"/> Chronological <input type="checkbox"/> Geographical <input type="checkbox"/> Other (specify) _____	9. Volume <input checked="" type="checkbox"/> File Drawer <input type="checkbox"/> Microfilm reel (s) <input type="checkbox"/> Computer Tape (s) <input type="checkbox"/> Other (specify) _____ 10. Annual Accumulation <input checked="" type="checkbox"/> File Drawer <input type="checkbox"/> Microfilm reel (s) <input type="checkbox"/> Computer Tape <input type="checkbox"/> Other (specify) _____
11. File is used <input type="checkbox"/> Daily <input type="checkbox"/> Weekly <input type="checkbox"/> Monthly <input type="checkbox"/> Annually or periodically when needed	12. File becomes inactive after <input type="checkbox"/> Month (s) <input checked="" type="checkbox"/> Year (s) 5 number	
13. Current Location (Building, Floor, Room) Development: 2nd floor of AH Archives in supply room	14. Is record series duplicated elsewhere? (If yes, specify agency of office.) <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Personnel/Human Resources Dept.	
15. Access Restrictions <input type="checkbox"/> Yes <input type="checkbox"/> No ? (if yes, cite law(s) and regulation(s))	16. Audit Requirements <input checked="" type="checkbox"/> None <input type="checkbox"/> State <input type="checkbox"/> Federal <input type="checkbox"/> Independent	
17. Is an index system used? (If yes, explain briefly and describe any hardware/software) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	18. Recommended Retention 5 years, then destroy.	
19. Name and Title of Preparer Melanie Stefursky Administrative Assistant II	20. Telephone Number (410) 543-6176	21. Date July 29, 1996

Agency Records Inventory

INSTRUCTIONS: PLEASE TYPE OR PRINT A SEPARATE FORM FOR EACH NEW OR REVISED RECORD SERIES. FORWARD WITH RECORDS RETENTION SCHEDULE

1. DEPARTMENT/AGENCY Salisbury State University	2. DIVISION Institutional Advancement (N/A to Alumni Relations)	3. UNIT Development
DEFINITION - Record Series - A group of related records normally filed and used as a unit for reference as well as retention and disposition purposes.		
4. Record Series Title: Capital Campaign	5. Earliest Year/Latest Year 1986 to present	
6. Record Series Description (Briefly describe the types of information/documents/forms found in the series. Include the purpose or function of the series.) Current pledge forms, letters, printouts, campaign file; ADS. This is a long running campaign for pledges with a specific monetary goal at the conclusion of the campaign.		
7. Record Series Format(s) <input checked="" type="checkbox"/> Letter size <input type="checkbox"/> Microfilm <input checked="" type="checkbox"/> Legal Size <input type="checkbox"/> Computer Tape <input type="checkbox"/> Bound Book <input type="checkbox"/> Floppy Disk <input type="checkbox"/> Audio Tape <input type="checkbox"/> Video Tape <input type="checkbox"/> Other (specify) _____ _____ _____	8. Record Series Sequence <input checked="" type="checkbox"/> Alphabetical <input type="checkbox"/> Numerical <input checked="" type="checkbox"/> Chronological <input type="checkbox"/> Geographical <input type="checkbox"/> Other (specify) _____ _____ _____	9. Volume <input checked="" type="checkbox"/> File Drawer <input type="checkbox"/> Microfilm reel (s) <input type="checkbox"/> Computer Tape (s) <input type="checkbox"/> Other (specify) 10. Annual Accumulation <input checked="" type="checkbox"/> File Drawer <input type="checkbox"/> Microfilm reel (s) <input type="checkbox"/> Computer Tape <input type="checkbox"/> Other (specify)
11. File is used <input type="checkbox"/> Daily <input type="checkbox"/> Weekly <input checked="" type="checkbox"/> Monthly	12. File becomes inactive after PERMANENT <input type="checkbox"/> Month (s) <input type="checkbox"/> Year (s) _____ number	
13. Current Location (Building, Floor, Room) Development: 2nd floor in AH	14. Is record series duplicated elsewhere? (If yes, specify agency of office.) <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No UMS	
15. Access Restrictions <input type="checkbox"/> Yes <input type="checkbox"/> No (if yes, cite law(s) and regulation(s)) N/A	16. Audit Requirements <input type="checkbox"/> None <input checked="" type="checkbox"/> State <input type="checkbox"/> Federal <input checked="" type="checkbox"/> Independent	
17. Is an index system used? (If yes, explain briefly and describe any hardware/software) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	18. Recommended Retention PERMANENT	
19. Name and Title of Preparer Melanie Stefursky Administrative Assistant II	20. Telephone Number (410) 543-6176	21. Date July 29, 1996

Agency Records Inventory

INSTRUCTIONS: PLEASE TYPE OR PRINT A SEPARATE FORM FOR EACH NEW OR REVISED RECORD SERIES. FORWARD WITH RECORDS RETENTION SCHEDULE

1. DEPARTMENT/AGENCY Salisbury State University	2. DIVISION Institutional Advancement	3. UNIT
DEFINITION - Record Series - A group of related records normally filed and used as a unit for reference as well as retention and disposition purposes.		
4. Record Series Title: Sponsored Programs	5. Earliest Year/Latest Year 1986 to PRESENT	
6. Record Series Description (Briefly describe the types of information/documents/forms found in the series. Include the purpose or function of the series.) U.S. GOVERNMENT, TITLE III and GRANTS		
7. Record Series Format(s) <input checked="" type="checkbox"/> Letter size <input type="checkbox"/> Microfilm <input type="checkbox"/> Legal Size <input type="checkbox"/> Computer Tape <input type="checkbox"/> Bound Book <input type="checkbox"/> Floppy Disk <input type="checkbox"/> Audio Tape <input type="checkbox"/> Video Tape <input type="checkbox"/> Other (specify) _____ _____ _____	8. Record Series Sequence <input type="checkbox"/> Alphabetical <input type="checkbox"/> Numerical <input checked="" type="checkbox"/> Chronological <input type="checkbox"/> Geographical <input type="checkbox"/> Other (specify) _____ _____ _____	9. Volume <input checked="" type="checkbox"/> File Drawer <input type="checkbox"/> Microfilm reel (s) <input type="checkbox"/> Computer Tape (s) <input type="checkbox"/> Other (specify) _____ 10. Annual Accumulation 1/4 <input checked="" type="checkbox"/> File Drawer <input type="checkbox"/> Microfilm reel (s) <input type="checkbox"/> Computer Tape <input type="checkbox"/> Other (specify) _____
11. File is used <input type="checkbox"/> Daily <input type="checkbox"/> Weekly <input checked="" type="checkbox"/> Monthly	12. File becomes inactive after State for 3 year <u>3</u> <input type="checkbox"/> Month (s) <input checked="" type="checkbox"/> Year (s) after contract. number Fed-6yrs., 3 mo.	
13. Current Location (Building, Floor, Room)	14. Is record series duplicated elsewhere? (If yes, specify agency of office.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
15. Access Restrictions <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (if yes, cite law(s) and regulation(s))	16. Audit Requirements <input type="checkbox"/> None <input checked="" type="checkbox"/> State <input checked="" type="checkbox"/> Federal <input type="checkbox"/> Independent	
17. Is an index system used? (If yes, explain briefly and describe any hardware/software) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	18. Recommended Retention 3 years after contract closes for State and Federal under \$25,000. 6 yr 3 mo. Federal over \$25,000.	
19. Name and Title of Preparer Kathie Rodkey	20. Telephone Number 445-1925	21. Date 2/28/98

Agency Records Inventory

INSTRUCTIONS: PLEASE TYPE OR PRINT A SEPARATE FORM FOR EACH NEW OR REVISED RECORD SERIES. FORWARD WITH RECORDS RETENTION SCHEDULE

1. DEPARTMENT/AGENCY Salisbury State University	2. DIVISION Institutional Advancement (N/A to Development)	3. UNIT Alumni Relations
DEFINITION - Record Series - A group of related records normally filed and used as a unit for reference as well as retention and disposition purposes.		
4. Record Series Title: Alumni Files	5. Earliest Year/Latest Year 1926 to present	
6. Record Series Description (Briefly describe the types of information/documents/forms found in the series. Include the purpose or function of the series.) General correspondence, newsletters, reunion files, yearbooks, and project files that support the operation of the Alumni Office.		
7. Record Series Format(s) <input checked="" type="checkbox"/> Letter size <input type="checkbox"/> Microfilm <input checked="" type="checkbox"/> Legal Size <input type="checkbox"/> Computer Tape <input checked="" type="checkbox"/> Bound Book <input checked="" type="checkbox"/> Floppy Disk <input type="checkbox"/> Audio Tape <input type="checkbox"/> Video Tape <input checked="" type="checkbox"/> Other (specify) ADS	8. Record Series Sequence <input checked="" type="checkbox"/> Alphabetical <input type="checkbox"/> Numerical <input checked="" type="checkbox"/> Chronological <input type="checkbox"/> Geographical <input checked="" type="checkbox"/> Other (specify) ADS	9. Volume 1/4 <input checked="" type="checkbox"/> File Drawer <input type="checkbox"/> Microfilm reel (s) <input type="checkbox"/> Computer Tape (s) <input checked="" type="checkbox"/> Other (specify)
11. File is used <input checked="" type="checkbox"/> Daily <input type="checkbox"/> Weekly <input type="checkbox"/> Monthly		10. Annual Accumulation <input checked="" type="checkbox"/> File Drawer <input type="checkbox"/> Microfilm reel (s) <input type="checkbox"/> Computer Tape <input checked="" type="checkbox"/> Other (specify)
12. File becomes inactive after See #18 for <u>1</u> exceptions. number <input type="checkbox"/> Month (s) <input type="checkbox"/> Year (s)		13. Current Location (Building, Floor, Room) Alumni Relations: 1st floor of Alumni House and Library
14. Is record series duplicated elsewhere? (If yes, specify agency of office.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		15. Access Restrictions <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (if yes, cite law(s) and regulation(s))
16. Audit Requirements <input type="checkbox"/> None <input checked="" type="checkbox"/> State <input type="checkbox"/> Federal <input checked="" type="checkbox"/> Independent		17. Is an index system used? (If yes, explain briefly and describe any hardware/software) ADS <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
18. Recommended Retention Screen yearly and destroy. Adm./legal material keep for 25 years, then destroy. Historical material to be kept permanently.		19. Name and Title of Preparer Melinda Khazeh Administrative Asst. II
20. Telephone Number (410) 543-6042		21. Date July 31, 1996

Agency Records Inventory

INSTRUCTIONS: PLEASE TYPE OR PRINT A SEPARATE FORM FOR EACH NEW OR REVISED RECORD SERIES. FORWARD WITH RECORDS RETENTION SCHEDULE

1. DEPARTMENT/AGENCY Salisbury State University	2. DIVISION Institutional Advancement	3. UNIT
DEFINITION - Record Series - A group of related records normally filed and used as a unit for reference as well as retention and disposition purposes.		
4. Record Series Title: Special Project Files	5. Earliest Year/Latest Year 1986 to Present	
6. Record Series Description (Briefly describe the types of information/documents/forms found in the series. Include the purpose or function of the series.) Correspondence, records of negotiations, legal agreements and working papers relating to efforts to preserve certain "collections".		
7. Record Series Format(s) <input checked="" type="checkbox"/> Letter size <input type="checkbox"/> Microfilm <input type="checkbox"/> Legal Size <input type="checkbox"/> Computer Tape <input type="checkbox"/> Bound Book <input type="checkbox"/> Floppy Disk <input type="checkbox"/> Audio Tape <input type="checkbox"/> Video Tape <input type="checkbox"/> Other (specify)	8. Record Series Sequence <input type="checkbox"/> Alphabetical <input type="checkbox"/> Numerical <input checked="" type="checkbox"/> Chronological <input type="checkbox"/> Geographical <input type="checkbox"/> Other (specify)	9. Volume <input checked="" type="checkbox"/> File Drawer <input type="checkbox"/> Microfilm reel (s) <input type="checkbox"/> Computer Tape (s) <input type="checkbox"/> Other (specify)
10. Annual Accumulation 1/4 <input checked="" type="checkbox"/> File Drawer <input type="checkbox"/> Microfilm reel (s) <input type="checkbox"/> Computer Tape <input type="checkbox"/> Other (specify)		
11. File is used <input type="checkbox"/> Daily <input type="checkbox"/> Weekly <input checked="" type="checkbox"/> Monthly	12. File becomes inactive after <u>1</u> <input type="checkbox"/> Month (s) <input type="checkbox"/> Year (s) <small>number</small>	
13. Current Location (Building, Floor, Room)	14. Is record series duplicated elsewhere? (If yes, specify agency of office.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
15. Access Restrictions <input type="checkbox"/> Yes <input type="checkbox"/> No (if yes, cite law(s) and regulation(s))	16. Audit Requirements <input checked="" type="checkbox"/> None <input type="checkbox"/> State <input type="checkbox"/> Federal <input type="checkbox"/> Independent	
17. Is an index system used? (If yes, explain briefly and describe any hardware/software) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	18. Recommended Retention 1 year, then destroy. Any found historical material to be kept permanently. Legal material for 25 years, then destroy.	
19. Name and Title of Preparer K. Rodkey	20. Telephone Number 44501925	21. Date 2/28/98

Agency Records Inventory

INSTRUCTIONS: PLEASE TYPE OR PRINT A SEPARATE FORM FOR EACH NEW OR REVISED RECORD SERIES. FORWARD WITH RECORDS RETENTION SCHEDULE

1. DEPARTMENT/AGENCY Salisbury State University	2. DIVISION Institutional Advancement	3. UNIT Development and Alumni Relations
DEFINITION - Record Series - A group of related records normally filed and used as a unit for reference as well as retention and disposition purposes.		
4. Record Series Title: LIBRARY DONOR FILES	5. Earliest Year/Latest Year 1984 to present	
6. Record Series Description (Briefly describe the types of information/documents/forms found in the series. Include the purpose or function of the series.) Incoming/outgoing correspondence, letters of acknowledgement, etc. GIFT AGREEMENTS, ETC. DOCUMENTING GIFTS OF LIBRARY MATERIALS BY OUTSIDE DONORS TO UNITS WITHIN LIBRARY. Research notes, files on indiv. donors.		
7. Record Series Format(s) <input checked="" type="checkbox"/> Letter size <input type="checkbox"/> Microfilm <input checked="" type="checkbox"/> Legal Size <input type="checkbox"/> Computer Tape <input type="checkbox"/> Bound Book <input type="checkbox"/> Floppy Disk <input type="checkbox"/> Audio Tape <input type="checkbox"/> Video Tape <input checked="" type="checkbox"/> Other (specify) ADS	8. Record Series Sequence <input checked="" type="checkbox"/> Alphabetical <input type="checkbox"/> Numerical <input checked="" type="checkbox"/> Chronological <input type="checkbox"/> Geographical <input type="checkbox"/> Other (specify)	9. Volume <input type="checkbox"/> File Drawer <input type="checkbox"/> Microfilm reel (s) <input type="checkbox"/> Computer Tape (s) <input checked="" type="checkbox"/> Other (specify) ADS 10. Annual Accumulation <input type="checkbox"/> File Drawer <input type="checkbox"/> Microfilm reel (s) <input type="checkbox"/> Computer Tape <input checked="" type="checkbox"/> Other (specify) ADS
11. File is used <input checked="" type="checkbox"/> Daily <input type="checkbox"/> Weekly <input type="checkbox"/> Monthly	12. File becomes inactive after PERMANENTLY _____ <input type="checkbox"/> Month (s) <input type="checkbox"/> Year (s) See #18 for exception number	
13. Current Location (Building, Floor, Room) Alumni Relations on 1st floor in AH Development on 2nd floor in AH Archives in supply room	14. Is record series duplicated elsewhere? (If yes, specify agency of office.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
15. Access Restrictions <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (if yes, cite law(s) and regulation(s))	16. Audit Requirements <input type="checkbox"/> None <input checked="" type="checkbox"/> State <input type="checkbox"/> Federal <input checked="" type="checkbox"/> Independent	
17. Is an index system used? (If yes, explain briefly and describe any hardware/software) ADS <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	18. Recommended Retention Permanently for gift agreements, etc. 10 years for research notes, receipts, files on donors after file declared inactive.	
19. Name and Title of Preparer Melanie Stefursky Melinda Khazeh Adm. Assts. II	20. Telephone Number (410) 543-6176 (410) 543-6042	21. Date July 29, 1996

Agency Records Inventory

INSTRUCTIONS: PLEASE TYPE OR PRINT A SEPARATE FORM FOR EACH NEW OR REVISED RECORD SERIES. FORWARD WITH RECORDS RETENTION SCHEDULE

1. DEPARTMENT/AGENCY Salisbury State University	2. DIVISION Institutional Advancement	3. UNIT Development and Alumni Relations
DEFINITION - Record Series - A group of related records normally filed and used as a unit for reference as well as retention and disposition purposes.		
4. Record Series Title: Work Orders	5. Earliest Year/Latest Year 1986 to present	
6. Record Series Description (Briefly describe the types of information/documents/forms found in the series. Include the purpose or function of the series.) Work orders that relate to the budgetary operations of both the Alumni Relations and Development units.		
7. Record Series Format(s) <input checked="" type="checkbox"/> Letter size <input type="checkbox"/> Microfilm <input checked="" type="checkbox"/> Legal Size <input type="checkbox"/> Computer Tape <input type="checkbox"/> Bound Book <input type="checkbox"/> Floppy Disk <input type="checkbox"/> Audio Tape <input type="checkbox"/> Video Tape <input type="checkbox"/> Other (specify) _____	8. Record Series Sequence <input type="checkbox"/> Alphabetical <input type="checkbox"/> Numerical <input checked="" type="checkbox"/> Chronological <input type="checkbox"/> Geographical <input checked="" type="checkbox"/> Other (specify) <u>Budget account codes</u> <u>and fiscal years</u>	9. Volume <input checked="" type="checkbox"/> File Drawer <input type="checkbox"/> Microfilm reel (s) <input type="checkbox"/> Computer Tape (s) <input type="checkbox"/> Other (specify) 10. Annual Accumulation <input checked="" type="checkbox"/> File Drawer <input type="checkbox"/> Microfilm reel (s) <input type="checkbox"/> Computer Tape <input type="checkbox"/> Other (specify)
11. File is used <input checked="" type="checkbox"/> Daily <input type="checkbox"/> Weekly <input type="checkbox"/> Monthly	12. File becomes inactive after <u>3</u> <input type="checkbox"/> Month (s) <input checked="" type="checkbox"/> Year (s) <small>number</small>	
13. Current Location (Building, Floor, Room) Alumni on 1st floor of AH Development on 2nd floor of AH Archives in supply room	14. Is record series duplicated elsewhere? (If yes, specify agency of office.) <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No By department who supplied service; service referenced on budget printouts if cost involved	
15. Access Restrictions <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (if yes, cite law(s) and regulation(s))	16. Audit Requirements <input type="checkbox"/> None <input checked="" type="checkbox"/> State <input type="checkbox"/> Federal <input checked="" type="checkbox"/> Independent	
17. Is an index system used? (If yes, explain briefly and describe any hardware/software) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	18. Recommended Retention -3 years, then destroy.	
19. Name and Title of Preparer Melanie Stefursky Melinda Khazeh Adm.Asst.II	20. Telephone Number (410) 543-6176 (410) 543-6042	21. Date July 29, 1996