

Advancement Advancement

Records Liaison: Julie Coleman/Susan Marathas

Advcmnt1 Correspondence

Advcmnt1.1 Correspondence-General

Correspondence relating to development contacts and other fundraising efforts of the advancement department. Includes electronic mail that communicates the above will be retained in the Raisers' Edge system or current college system.

Retain one permanent copy in the Office of Prospect Research. Electronic records kept permanently.

Advcmnt1.2 Campaign

Records documenting communication received or sent which contain significant information about capital campaigns. Includes electronic mail that communicated the above. This would include all the original Confidential Letter of Intent, along with the communication leading to the executed document. Original documentation will be retained in the constituent files located in the Researcher's Office in Donahue Hall listed on the constituents file in Raiser's Edge or current college system.

Permanent. Send to Archives when campaign closes and administrative need ends.

Advcmnt1.3 Scholarship Reports

All fully executed scholarship files are maintained by the Special Events and Stewardship Coordinator. Scholarships are signed by the donor and the President of Stonehill College. Examples of scholarships are: Endowed Scholarships, Annual Scholarships and Discounted Scholarships.

Endowed-kept permanently
Annual and Discounted Scholarships-retain for five years after awarded then reviewed by Advancement and Archives for possible longer retention.

Advcmnt1.4 Planning Giving Files

Any gift to Stonehill College through the use of Estate Planning; (i.e. bequests, trusts, gift annuities or other planning vehicles used for the purpose of generating income for the life of the donor) is the responsibility of the Planning Giving/Major Gifts Officer. All preparatory work on the documents will be maintained in the office of the Planning Giving/Major Gifts Officer and documented on the constituents (donor's) record in Raiser's Edge or College's current system.

Permanent file in the Researcher's Office. Retain until no longer of administrative need.