**Vice President for Finance and Administration**

Originally, the Central Business Office, this department now oversees 6 divisions:

Business Services (Controller), Human Resources, Investments, Auxiliary Services,

Information Technology Services, and Physical Plant. The Vice-President for

Finance and Administration is responsible for supervising the divisions and is

directly involved with specific projects.

**Retention Schedule**

**Board of Trustees.** Files for the Investment Committee and Audit and Budget

Committees of the Board of Trustees. Files contain information for the committee

meetings including agendas, reports, and background information.

Disposition Instructions: Maintain in office for 5 years, transfer to College

Archives for appraisal and final disposition.

**Budget Files.** Records for budget development and for tracking current year

expenses. Includes monthly reports from Controller.

Disposition Instructions: Destroy in office after 1 year.

**Deeds.** Original deeds with copies of maps and occasional correspondence or

memorandum for properties given to the college.

Disposition Instructions: PERMANENT. Transfer to the College Archives for

permanent retention.

**General Files.** Subject files for activities and committees connected to the

office. Files may contain correspondence, memorandum, reports, and reference

data.

Disposition Instructions: Maintain in office until information is superseded

or outdated. Transfer to College Archives for appraisal and final disposition.

**Historical Files**. Contains records for special projects or activities such as the

Davidson College Cemetery, Davidson College Presbyterian Church, Duke

Endowment, and the E. L. Baxter Davidson Property. Files contain

correspondence, reports, ledgers, background data, and legal information.

Disposition Instructions: Maintain in office for 10 years, transfer to College

Archives for appraisal and final disposition.

**Insurance.** Historical information about insurance policies held by the College.

Also contains current files on all automobile and truck titles held by the College.

Disposition Instructions: Maintain title information in office. Transfer

closed insurance files to Physical Plant or College Archives for appraisal and

final disposition.

**Investment Reports.** Reports from the investment companies responsible for

Davidson College properties and accounts. Files contain monthly or quarterly

statements. They are used for reference purposes within the College.

Disposition Instructions: Destroy in office after 1 year.

**Loan Files.** Primarily historical files relating to the College's programs of

providing loans or mortgage supplements for Davidson faculty. About 20 to 25

files are active, the remaining files are closed. There are also files for life

insurance policies related to the loans. Files contain restricted information.

Disposition Instructions: Maintain in office for 1 year after all files are

closed, transfer to College Archives for appraisal and final retention.

**Patterson Court**. Historical information and a current file on the College's

eating houses in Patterson Court. The historical files contain correspondence,

memoranda, and accounting records for each of the houses. The current file

contains records relating to the payment of bills and eating house accounts.

Disposition Instructions: Maintain active files in office for 3 years, transfer

to College Archives for appraisal and final disposition.

**Property Files.** Records for properties owned by the College outside of

Mecklenburg County, NC and outside the state of North Carolina. Also records

relating to the property acquired by the College at I-77 and Griffith Street.

Disposition Instructions: Maintain in office for 1 year after projects are

completed or property is sold, transfer to College Archives for appraisal and

final disposition.

**Tax Files.** Records related to tax payments and exemptions. Includes copies of

transactions, and records relating to college owned property and leases.

Disposition Instructions: Maintain in office for 10 years, transfer to College

Archives for appraisal and final disposition.