

Record Series Identifier	Record Series Name			
6.0	UNIVERSITY ADVANCEMENT			
Record Identifier	Record Title	Custodian of Records	Retention Source Authority	Retention/Destruction Period
6.1	Solicitation Campaigns Using Commercial Fundraisers	Advance-ment	Government Section 12599.7(a)	10 year retention. Law applies to commercial fundraisers and must be included as a provision of any contract.
6.2	Date & Amount of each cash contribution	Advance-ment	Government Section 12599.7(a)	10 year retention. Law applies to commercial fundraisers and must be included as a provision of any contract.
6.3	Date, Amount, Name & Address of each non-cash contributor	Advance-ment	Government Section 12599.7(a)	10 year retention. Law applies to commercial fundraisers and must be included as a provision of any contract.
6.4	Name & Address of each employee or agent involved	Advance-ment	Government Section 12599.7(a)	10 year retention. Law applies to commercial fundraisers and must be included as a provision of any contract.

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6.5	Documentation of all revenue received and all expenses incurred	Advance-ment	Government Section 12599.7(a)	10 year retention. Law applies to commercial fundraisers and must be included as a provision of any contract.
6.6	The account number, name and location of bank or financial institution in which accounts were maintained	Advance-ment	Government Section 12599.7(a)	10 year retention. Law applies to commercial fundraisers and must be included as a provision of any contract.
6.8	Namings of Colleges, Schools and other Academic Entities, documents supporting approval by the Board of Trustees	Advance-ment		Permanent
6.9	Namings Facilities and Properties, documents supporting approval by the Board of Trustees	Advance-ment		Permanent
6.10	Donor Profiles	Advance-ment		Permanent

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6.11	Substantive Contact Reports	Advance-ment		Until death of individual or settlement of estate
6.12	Alumni Database	Advance-ment		Permanent
6.13	Affinity Solicitation Opt-Out	Advance-ment		Until revoked or death of individual
6.14	FERPA Opt-Out	Advance-ment		Until revoked or death of individual
6.15	Policies and Procedures	Advance-ment		Maintain most current in force. Historical policies and procedures should be retained until university internal audit or four years* whichever comes first.
6.16	Charitable contributions			
6.16.1	Amount and date			Permanent
6.16.2	Donor designated use or purpose			Permanent

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6.16.3	Donor imposed restrictions			Permanent
6.16.4	Donor benefits or conditions; i.e., any privilege, benefit, employment, program admission, or other special consideration from the foundation or the university in exchange for the pledge or donation.			Permanent
6.16.5	Records related to the receipt, holding, and disbursement of gifts.			Permanent
6.16.6	Records related to a donor or prospective donor's personal, financial, estate planning, or gift planning matters.			Destroy upon donor or prospective donor's death, with the exception of records that are to be held through the settlement of the donor's estate.
6.16.7	Records received from the donor or prospective donor regarding a prospective gift or pledge.			Destroy upon donor or prospective donor's death, with the exception of records that are to be held through the settlement of the donor's estate.

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6.16.8	Pledge agreements			Permanent records for fulfilled pledges. Pledge agreements that have been written-off should be retained until university internal audit or four years* whichever comes first.
6.16.9	Gift batch records			Until university internal audit or four years* whichever comes first.