

STATE UNIVERSITY OF NEW YORK RECORDS RETENTION AND DISPOSITION SCHEDULE

ALUMNI & DEVELOPMENT

ALUMNI

NOTE: Paper records may be destroyed after scanning or microfilming, with digital and microfilm versions replacing the original for retention purposes.

Record	RDA Number	Content	Minimum Retention	Notes	Reason for Proposed Time
1. Alumni Biographical Data	22202	Directory or other master summary record of alumni and all other degree recipients, such as published alumni catalog, providing names of alumni, years of graduation, and other information such as degrees granted and place of residence, and other information.	PERMANENT	Document retention requirements refer only to material maintained by the University. Records retained by separate campus foundations or alumni associations are subject to foundation or association policies and procedure.	Sufficient to meet administrative operational needs.

DEVELOPMENT

NOTE: Paper records may be destroyed after scanning with digital version replacing the original for retention purposes.

Record	RDA Number	Content	Minimum Retention	Notes	Reason for Proposed Time
--------	------------	---------	-------------------	-------	--------------------------

STATE UNIVERSITY OF NEW YORK RECORDS RETENTION AND DISPOSITION SCHEDULE

ALUMNI & DEVELOPMENT

<p>1. Donor (and prospective donor) information records</p>	<p>22203</p>	<p>Information on individuals, organizations, foundations, or corporations</p>	<p>0 after no longer needed</p>	<p>Document retention requirements refer only to material maintained by the University. Records retained by separate campus foundations are subject to foundation policies and procedure.</p>	<p>Sufficient to meet administrative operational needs.</p>
<p>2. Record of gifts and bequests to a college or the University</p>	<p>22204</p>	<p>Record of gifts and bequests including copy of will, copies of deeds or titles, maps and surveys (if applicable), and records of establishment of and use of monies generated by trust fund or endowment</p>			
		<p>a. When trust fund or endowment is involved</p>	<p>PERMANENT</p>		<p>Sufficient to meet administrative operational needs.</p>
		<p>b. For gift of real property, work of art, historical or other artifact, or historical manuscript</p>	<p>PERMANENT</p>		<p>Sufficient to meet administrative operational needs.</p>

STATE UNIVERSITY OF NEW YORK RECORDS RETENTION AND DISPOSITION SCHEDULE

ALUMNI & DEVELOPMENT

		c. For gift or bequest not covered under parts "a" or "b"	6 years		CPLR § 213	
3. Alumni association or foundation file	22205	Records concerning the association's or foundation's relation with a college or the University	Document retention requirements refer only to material maintained by the University. Foundations and incorporated associations are guided by their particular policies and procedure.			
		a. Agreement or memorandum of understanding between the college or the University and a separately incorporated alumni association or foundation	6 years after expiration or termination	Appraise these records for historical significance and permanent retention prior to disposition.	Sufficient to meet administrative operational needs.	
		b. Significant correspondence or records relating to decision-making or policy	PERMANENT	Appraise these records for historical significance and permanent retention prior to disposition.	Sufficient to meet administrative operational needs.	
		c. Routine correspondence and related materials	0 after no longer needed		Sufficient to meet administrative operational needs.	