

FERRIS STATE UNIVERSITY

Schedule 2004.024- Development and Planned Giving

N.b. If departments are unable to retain records for the length of time set out in this general record schedule due to space constraints, consult the University's Archivist for assistance and storage at the Record Center.

| Item No | Record Series, Title and Description | Department Retention | Records Center Retention | University Archives |
|---------|--|----------------------|--------------------------|---------------------|
| 1 | Accounting Records. Includes monthly gift distribution reports and annual reports on cash received. | CR+10 | | Yes |
| 2 | Batch Reports. Includes monthly reports on gift receipt batches and gift receipt batches. Information is also available through donor records. Confidential destruction required. | CR+10 Destroy | | |
| 3 | Bequest Records. Copies of wills bequeathing gifts to Ferris. | Permanent | | |
| 4 | Donor Prospect Records. Information about potential donors including both individuals and corporations and documentation of contact with donors. Available in both paper and database format. | ACT | | Yes |
| 5 | Donor Records. Information about donors including biographical information, financial reports and attached correspondence. This series also includes annual reports of individual giving history. Earlier records are maintained in paper files of donor cards and acknowledgement records. | Permanent | | |
| 6 | Donor Society Records. Membership files including correspondence, insurance policies, pledge cards and financial data | CR+50 | | Yes |
| 7 | In-Kind Gift Records. Forms documenting receipt of in-kind gift and values. | CR+50 | | Yes |
| 8 | Scholarship Agreement Records. Includes scholarship descriptions, accounting data and correspondence. | Permanent | | |
| 9 | Scholarship Records. Includes correspondence and documentation such as accounting data, reports and other historical information. Records become inactive when the scholarship is no longer funded. | ACT+20 | | Yes |
| 10 | Trademark Licensing Records. Includes contract agreements, royalty reports and related correspondence. | ACT | | Yes |

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| | Records become inactive once the University decides not to renew the trademark. | | | |
| 11 | University Subject Files. These records are used to document the individual's involvement and knowledge of the activities of the university. Divided alphabetically, a subject file typically includes annual reports, correspondence, consultations, evaluations, events, notes, organizational information, planning documents, reports and staff meeting notes. A record becomes inactive when it ceases, been disbanded or the individual is no longer involved. | ACT+10 | | Yes |

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Key:

ACT = Active
 CR = Creation
 SUP = Retain Until Superseded
 CY = Calendar Year (current)
 ID = Immediate Disposal
 FY = Fiscal Year (current)
 PM = Permanent
 y = year(s)