### Wright State University
#### RECORDS RETENTION SCHEDULE (RRS)

**Instructions**: This form establishes a schedule of retention and disposal for the listed records series, based on procedures provided by Section 149.333 of the Ohio Revised Code. Offices are required to submit a Certificate of Records Disposal (CRD) to the University Records Manager prior to the disposal of records listed on their retention schedule, as per Wright Way Policy 2501. This schedule shall become effective on the last date approved. Obtain approvals and return to the University Records Manager, Special Collections and Archives, 401 Dunbar Library. For assistance, please call ext. 2017, or write to chris.wydman@wright.edu.

**UNDV**

**Division**: V.P., University Advancement

**Approvals**

| Dean/Director/Head: |  
| Department Chairperson/Manager: |  
| University Records Manager: |  
| Head, Special Collections and Archives: |  

1. **Medium code**: P=Paper, M=Microfilm/Fiche, E=Machine Readable  
2. **Value code**: C=Confidential, H=Historical, R=Restricted, V=Vital  
3. **Description**: A separate retention period is required for each medium in the same records series.

<table>
<thead>
<tr>
<th>WSU Records Series Number</th>
<th>Medium Code¹</th>
<th>Value Code²</th>
<th>Records Series Title and Description³</th>
<th>IUC Number</th>
<th>Retention Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>UNDV10-01</td>
<td>P/E</td>
<td>V/H</td>
<td>Agreements-Scholarships</td>
<td>LEG2000</td>
<td>Retain while active, plus five years. Then, review for continuing administrative or historical value.*</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Finalized agreements on scholarships funded by individuals or companies with funds held in University Foundation.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>UNDV10-02</td>
<td>P/E</td>
<td>C/H</td>
<td>Campaign Files</td>
<td>ADM9910</td>
<td>Retain in the office for three years, then, review for continuing administrative or historical value.*</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Files pertaining to fund-raising campaigns handled by the offices of Corporate and Foundation Relations and Annual Giving such as:</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>1. Campus Scholarship</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
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<td>2. Corporate Appeal</td>
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<td></td>
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<td>3. Capital</td>
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<td></td>
<td></td>
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<td>4. Other</td>
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<td></td>
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**Note**: Longer term storage may include, but not restricted to, archives, an institutional records storage center, and conversion to microfilm or other acceptable mass storage media (per Sec. 9.01 of the Ohio Revised Code).

1/13/11
Wright State University
RECORDS RETENTION SCHEDULE (RRS)
(continuation sheet)

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| UNDV10-03                 | E           | C/H/V      | **Donor Database-Information Services**
Electronic donor files utilized by all sections under University Development and Alumni Relations.  
*Note:* Includes complete chronological gift/pledge history. Each donation is linked to a unique numerical identifier. | ADM9910    | Retain in the office indefinitely. Periodically review for continuing administrative or historical value. * |
| UNDV10-04                 | P/E         | H          | **Donor Files**
Includes information on major donors (gifts over $5,000), donor giving history, copies of checks and correspondence with the office of AVP for Advancement. | ADM9910    | Retain in the office indefinitely. Then, review for continuing administrative or historical value. * Periodically transfer select records to the University Archives. |
| UNDV10-05                 | P/E         | H          | **Events Files**
Files pertaining to fund-raising events handled by Foundation and Corporate Relations office, the Annual Giving office and the Stewardship Coordinator. Information includes guest lists, press releases, speeches, correspondence, etc. | ADM9900    | Retain in the office for three years, and then transfer select records to the University Archives. |
| UNDV10-06                 | P/E         | C          | **Personnel Files-Applications (non-hires)** | PER2000    | Retain three years. If available through PeopleAdmin, hard copies may be destroyed after one year. |
| UNDV10-07                 | P/E         | C          | **Personnel Files-Department**
Personnel files of staff working in Development Office, including student employees. Files include performance evaluations, letters of recommendations, correspondence, applications/resumes, copies of contracts, vacation, sick, and professional leave information.  
*Note:* Long-term information is held by Human Resources Office. | PER3000    | Destroy within two years of termination. If subject to legal action, retain until final disposition. |

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### RECORDS RETENTION SCHEDULE (RRS)
(continuation sheet)

#### New Revision x Addition
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| UNDV10-08                | P/E         | C          | Personnel Files-Employee Selection  
Vitae, letters, and other records of individuals  
who have applied for staff positions but were  
not hired. | PER2000 | Retain for three years, then destroy. |
| UNDV10-09                | P/E         | C          | Personnel Files-Recruitment Records  
Job postings, interview questions, interview  
notes, status of position offer form, and other  
documentation required by Affirmative Action | PER2000 | Retain for three years, then destroy. |
| UNDV10-10                | P/E         | C/H        | Proposals-Donors  
It includes a) proposals on corporate donors,  
foundations, and individuals and b) fund-  
raising proposals compiled by the University  
Development officers for the University  
Development office. | ADM9910 | Retain in the office indefinitely. |
| UNDV10-11                | P/E         | H          | Reports-Annual  
Annual reports by development officers in  
WSU departments or schools.  
**Note:** VP’s office holds a copy, AVP’s office holds original reports. | ADM9910 | Retain in the office for three years.  
Then, review for continuing administrative or  
historical value.* |
| UNDV10-12                | P/E         | H          | Reports-Annual-WSU Foundation  
includes examples of activities pertaining to  
donor relations.  
**Note:** Distribution: 8,000 copies | ADM9910 | Retain in the office for three years.  
Then, review for continuing administrative value.  
Transfer one copy annually to the University Archives. |

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**Wright State University**  
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<td>UNDV99-10</td>
<td>P/E</td>
<td>H</td>
<td><strong>Reports-Statistical-Internal</strong></td>
<td>ADM9910</td>
<td>Retain in the office for three years. Then, review for continuing administrative or historical value.*</td>
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</table>
|                           |             |            | Includes year-end reports and donor profiles.  
**Note:** Majority of reports began in early 1999. |            | Retain in the office for three years. Then, review for continuing administrative value. Transfer one copy annually to the University Archives. |
| UNDV99-11                | P/E         | H          | **Subject Files- Assistant Vice President’s** | ADM9910    | Retain in the office for three years. Then, review for continuing administrative or historical value.* |
|                           |             |            | Includes correspondence, reports, minutes, memoranda, and policy and informational files. The subject files are cross-referenced with the chronological correspondence files.  
**Note:** Some files are considered confidential. |            | |

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