

Retention Schedule
University of Florida Foundation, Inc.
Adopted November, 2000

ADMINISTRATIVE AND MANAGEMENT

Administrative Policy Files.

Summary: An alphabetical subject file including chronological reading files including letters drafted for the UF President, letters of the Executive Vice President and Associate Vice President for Administration, bound reports, tape recordings, photographs and other records related to the work of the Foundation Administration.

Extent: 85 cubic feet

Recommended Retention: Retain in the office until obsolete then transfer to Archives Storage.

Administrative Reference Files.

Summary: Documents that are usually published and widely distributed, filed by subject and containing information on colleges and units, reference materials on Foundation policies and procedures, other materials related to the work of the office, and information sent to the Foundation Administration for informational purposes.

Extent: 28 cubic feet

Recommended Retention: Destroy as a NAP (normal administrative practice).

Administrative Reference Files—Investment Managers.

Summary: Documents circulated by investment managers who wish to be hired by the Foundation.

Extent: 5 cubic feet

Recommended Retention: Destroy as a NAP.

Administrative Support Files.

Summary: Records related to the internal administrative activities of running the offices of the Foundation. It includes budget, day-to-day management of office personnel, supplies, office services, equipment requests, and copies of disbursements for the office.

Extent: 59 cubic feet

Recommended Retention: After three calendar years remove any historical or financial files and send to Archives Storage. Destroy remaining files as NAP.

Computing Services. Job Control Language Reports.

Summary: Documents actual programs used to run reports (including Ad Hoc) and details about how the report is run on the Main Frame.

Extent: 54 cubic feet.

Recommended Retention: One fiscal year then destroy.

Administrative and Management—continued.

Minutes. Weekly Staff Meetings

Summary: Transcripts and agendas of weekly staff meetings. Format changed from paper to electronic in 1999.

Recommended Retention: Record copy is with Associate Vice President for Development. Retain electronic version and delete after 6 months.

Board of Directors Files—University of Florida Foundation, Inc.

Summary: Documents the internal operations of the Foundation Board of Directors including events, committees, disclosures, and meetings, etc. Maintained by Operations Department.

Extent: 22 cubic feet

Recommended Retention: Retain for the life of the Foundation. Discard housekeeping records when obsolete then transfer to Archival Storage.

Finance and Accounting: Keep Investment, Audit and Finance Committee records and transfer to Archives Storage.

Duplicates: Destroy as a NAP

Council for Advancement and Support of Education - Organizational Files.

Summary: Documents the participation in report programs developed by CASE, a membership organization of other development offices in educational institutions. Contains correspondence, reports, and meeting information and is arranged by subject. Maintained by Operations.

Extent: 3 cubic feet

Recommended Retention: Destroy as a NAP

President's Box History Files.

Summary: Documents invitations to sit in the President's Box at football games. Invitees are politicians, officials, donors and University of Florida staff who work with donors. Maintained by Operations

Extent: 7 cubic feet.

Recommended Retention: Retain 5 calendar years then destroy.

President's Council Files.

Summary: Documents the internal operations of the President's Council including events, and mailings. Maintained by Operations.

Extent: 15 cubic feet

Recommended Retention: Retain for the life of the Foundation. Discard housekeeping records when obsolete then transfer to Archival Storage.

Administrative and Management—continued

Records. Biographical Source Document File.

Summary: Documents, including notifications by development officers and individual donors, that provide information for making changes in the biographical information of individuals in Advance.

Recommended Retention: Most current. Destroy when information is verified in Advance.

Records. Biographical Source Document File—vital statistics.

Summary: Clippings of published obituaries and marriage announcements collected by Research and used to update the biographical information in Advance.

Recommended Retention: Destroy after information is verified in Advance.

Records. Biographical Survey Instruments.

Summary: Forms documenting extensive information on members. 20% of the alumni membership is surveyed each year. All data are captured into Advance excluding comment portions of form.

Extent: 40,000 forms in 26 boxes

Recommended Retention: Destroy after updates are entered into Advance.

Records. Gifts Processing (Fund Files).

Summary: Records that accompany income documenting the correct funds to credit with deposits. These items may be in the form of transmittal forms, pledge reminders, or others. May also include correspondence from the donor.

Extent: 48 cubic feet.

Recommended Retention: Five fiscal years after filing of final tax return for that year.

Records. Gifts Processing (Batch Files).

Summary: Copies of checks deposited and arranged in numerical sequence by batch number, then receipt number (a unique number for each deposit or check).

Extent: 7 cubic feet (Microfilm).

Recommended Retention: Five fiscal years after filing of final tax return for that year.

Gift Processing-Membership Cards with Checks film is inter-filed with this series.

Records. Gifts Processing (Fund Information File).

Summary: This series contains the UFF-A which opens a fund plus the memorandum of instructions for closing the fund.

Recommended Retention: Permanent. Transfer to Archival Storage.

Administrative and Management—Continued.

Records. Gifts Processing - Matching Gift Files (Corporate)

Summary: Documents companies matching programs for individual donations. Forms are completed by donor and forwarded to corporation.

Extent: 9 cubic feet.

Recommended Retention: Three fiscal years after match is received.

Records. Gifts Processing - Membership Cards from Lock Box.

Summary: Cards attached to checks, which document Alumni Association membership address information. These are processed directly by banking partner and microfilmed.

Extent: 25 cubic feet.

Recommended Retention: Fifteen months after posting to Advance.

Records. Gifts Processing. Membership Cards with Checks.

Summary: Cards attached to checks, which document Alumni Association membership address information. These are processed by the Foundation and microfilmed after three months.

Extent: 5 cubic feet

Recommended Retention: Microfilm after three months. After five fiscal years destroy microfilm.

Records. Gifts Processing - Payroll Deduction Files (Active).

Summary: Documents payroll deductions for University and Foundation employees.

Extent: 1 cubic foot.

Recommended Retention: Upon completion of obligation, transfer to Payroll Deduction Files (Inactive).

Records. Gifts Processing - Payroll Deduction Files (Inactive).

Summary: Documents completed payroll deductions from University and Foundation employees.

Extent: 1 cubic foot.

Recommended Retention: One fiscal year after completion of obligation.

Records. Gifts Processing - Pledge Records.

Summary: Documents the original commitment made by individuals and is filed alphabetically by donor name.

Extent: 24 cubic feet.

Recommended Retention: Destroy five fiscal years after fulfillment of pledge.

Gifts Processing - Reversals/Corrections Files.

Summary: Documents the maintenance of Advance with corrections that are not financial. Financial Reversals/Correction files are held in Finance and Accounting

Extent: 3 cubic feet.

Recommended Retention: Three calendar years after reversal/correction date.

Administrative and Management—continued

State Matching Files.

Summary: Correspondence between the Foundation and the State of Florida documenting the Foundation's application for State funds to match large gifts. It is maintained in the Office of the Associate Vice President for Administration.

Extent: 3 cubic feet.

Recommended Retention: Permanent, transfer to Archives Storage when closed.

Stewardship and Donor Relations - Member Data Cards.

Summary: 4 X 5 address cards on President's Council members. Index cards have been replaced by the Advance system.

Extent: 3 cubic feet.

Recommended Retention: Sample against Advance records then destroy.

Stewardship and Donor Relations - Merge Lists.

Summary: Documents the thank you letters generated by the office each year. While copies of these letters are forwarded to Research, the office keeps merged files of addresses and salutations.

Extent: 3 cubic feet.

Recommended Retention: One calendar year.

Stewardship and Donor Relations - President's Council History Files.

Summary: Information on the management of previous President's Council events.

Extent: 1 cubic foot.

Recommended Retention: Permanent - transfer obsolete materials to Archives Storage.

Stewardship and Donor Relations - Project Files.

Summary: Documents the office's activities in sponsoring President's Council events, such as distributing parking passes.

Extent: 10 cubic feet.

Recommended Retention: Retain for three calendar years then destroy. Transfer historical materials into President's Council History Files.

Stewardship and Donor Relations - Reports Files.

Summary: Information concerning reports issued by the office, including the Stewardship Checklist and the Annual Endowment Report. The Stewardship Checklist is a menu of recommended tasks for Development Officers. The Annual Endowment Reports contains information on the activity of endowed funds and goes to donors. These reports represent the commitment to follow up gifts to the University.

Extent: 2 cubic feet.

Recommended Retention: Two calendar years after issuing.

Vehicle Records

Summary: Records pertaining to each vehicle owned by the Foundation, including registration papers, copy of title, and tag information. Maintained by Operations.

Recommended Retention: One calendar year after disposition of vehicle.

Vehicle Records - Maintenance

Summary: Maintenance records, mileage, and gas log/expenses. Maintained by individual development officers.

Recommended Retention: Three calendar years after audit.

BUDGET AND FISCAL.

Art, Books and Manuscript Files.

Summary: Documents the status of funds containing materials given to the Foundation and listed as assets, arranged by fund number. Maintained by Finance and Accounting.

Extent: 8 linear feet

Recommended Retention: Three fiscal years after disposition of asset.

Asset Transmittal and Security Gift Files.

Summary: Forms used to accompany money and assets put into to Foundation funds. May also include accompanying information, such as correspondence, which defines the deposit.

Recommended Retention: Master records in Operations: 5 fiscal years after filing of final tax return for that year. Endowed funds transmittals should be retained as Permanent Records. Send to Archives Storage.

Duplicates: Retain until obsolete or transaction is complete then destroy as NAP.

Audits.

Summary: Reports issued by an independent auditor to establish and review the workings of the Foundation.

Recommended Retention: Permanent - when no longer needed in the office, transfer to Archives Storage.

Bank Reconciliations.

Summary: Bank documents reconciling bank accounts. Series kept in Finance and Accounting.

Recommended Retention: Current year + 1 year. Destroy earliest year as cycled.

Bank Statements.

Summary: Monthly statements of bank accounts showing debits, credits and cash balance in the account, including all statements of investments, money markets and custodial statements. Record copy in Finance and Accounting.

Recommended Retention: Three fiscal years after filing of final tax return for that year.

Duplicates: Destroy as a NAP.

Budgets.

Summary: The approved annual budget, filed chronologically.

Recommended Retention:

Working Papers: Discard one year after drafting annual budget.

Budget - Permanent, transfer to Archives Storage.

Budget Reports to Units: Finance and Accounting: Keep June 30 and transfer to Archives Storage.

Duplicates and Interim Reports: Destroy as a NAP.

Budget and Fiscal—Continued

Checks - Canceled.

Summary: Canceled checks issued for authorized payments or reimbursements.

Recommended Retention: Five fiscal years after filing of final tax return for that year.

Checks -Registers. (Check Registers are available on PeopleSoft Accounting Software. Hard copy should be printed only when needed and destroyed after use per KH 5/00).

Summary: Numerical register of all checks issued, including check number, date, amount payee, and purpose. It is primarily a computer-generated report.

Recommended Retention: Three fiscal years after filing of final tax return for that year.

Checks—Stubs.

Summary: The record of checks written and retained by the Foundation.

Recommended Retention: Destroy as a NAP.

Disbursements.

Summary: Disbursements Request Forms and accompanying documentation such as vendor invoices and documentation of expenses. The original record series is submitted to Finance and Accounting for the payment of Foundation bills.

Recommended Retention:

Master Copy: Filed in Finance and Accounting, Disbursements: Five fiscal years after filing of final tax return for that year.

Duplicates: Retain until obsolete or transaction is complete then destroy as NAP.

Financial Statements.

Summary: Quarterly financial statements created by Finance and Accounting.

Recommended Retention:

Working Papers: Three fiscal years after filing of tax return for that year.

Report: Included in Minutes to the Board. Destroy as NAP.

Budget and Fiscal—continued

General Fund Ledger . (This Series is being Discontinued-no longer needed per KH 4/00—information is now maintained in database)

Summary: Computer-generated report that accumulates monies in the accounting system at the end of each month.

Recommended Retention:

Monthly Reports: One calendar year.

June 30 Report: Permanent, when no longer needed in office, transfer to Archives Storage.

Gift Annuity Files

Summary: Documents the transfer of assets to the Foundation pursuant to a gift annuity agreement and is arranged alphabetically by individual's name. Documents payout of life interest to individuals. Master record for this series is in Finance and Accounting. Annuity is closed when assets are transferred to the Foundation for the benefit of the University.

Recommended Retention: Transfer to storage by year closed. Retain 10 years after closure then destroy.

JV Files (Journal Entries and Correction/Reversals).

Summary: Journal entries made to the general ledger. Includes corrections/reversal documents defining fund changes. This record series is maintained in Finance and Accounting.

Recommended Retention: Current year + 3 years. Destroy earliest year at beginning of each FY.

Livestock Files.

Summary: Documents the value of livestock owned by the Foundation. Kept in Finance and Accounting.

Recommended Retention: Current year plus one year of monthly reports. Annual (cumulative) Reports will be kept 5 years with 5th year being destroyed on the cycle.

Tax Returns.

Summary: Tax returns filed by the Foundation, created by outside accountants.

Recommended Retention: Permanent, when no longer needed in office transfer to Archival Storage.

Budget and Fiscal—continued

Travel Records.

Summary: Documents expenses incurred during travel including summary forms and supporting documentation.

Recommended Retention: Three fiscal years after filing of final tax return for that year.

Duplicates: Destroy as a NAP.

W-2 Forms.

Summary: Information from employer to employee concerning total wages paid during previous year.

Recommended Retention: Four years after filing of final tax return for that year.

BUILDING EQUIPMENT AND MAINTENANCE

Building Files -Capital Improvements.

Summary: Legal documents, correspondence, reports, agreements with architects, engineers, builders and construction companies documenting construction, repair and improvements to Foundation property.

Recommended Retention: Life of building. Transfer to Archival Storage.

Building Files -Improvements under \$5,000 and over \$500.

Summary: Legal documents, correspondence, reports, agreements with architects, engineers, builders and construction companies documenting construction, repair and improvements to Foundation property under \$5,000 and over \$500.

Recommended Retention: Fifteen calendar years after completion of contract.

Building Files – Improvements \$500 and under.

Summary: Legal documents, correspondence, reports, agreements with architects, engineers, builders and construction companies documenting construction, repair and improvements to Foundation property \$500 and under.

Recommended Retention: Three calendar years after completion of contract.

UFF FUND RAISING AND DEVELOPMENT.

Campaign Files -Historical.

Summary: Documents the current campaign and contains information such as RFP's, regional campaign progress, and cumulative reports for all units. This information is maintained throughout the organization

Recommended Retention: All offices should retain files on the campaign until obsolete. At close of campaign, merge to a central archive series then transfer to Archival Storage.

Campaign Files -Housekeeping.

Summary: Financial and event information on the management of the campaign.

Recommended Retention: Three fiscal years after close of campaign.

Annual Giving - Reference Files.

Summary: Copies of documents from specialized mailings, college fund-raising events and other fundraisers. It documents solicitations over a period of ten years.

Extent: 6 cubic feet.

Recommended Retention: Transfer to Archival Storage.

Development Officers Records.

Summary: Information on Development Officers including budgets, evaluation, and current plans for working with donors. Arranged by name of individual, and held in the Office of the Executive Vice President. This series also includes contact reports, quarterly reports, activity reports and itineraries.

Extent: 9 cubic feet.

Recommended Retention: Transfer all evaluative materials to Human Resources. Destroy three fiscal years after termination.

Planned Giving Program - Bequest Society Files.

Summary: Documents names of members of the Bequest Society, which recognizes individuals who have made the Foundation a beneficiary in a will, trust or retirement program. Approved form of the name is released in an honor roll publications.

Extent: 6 cubic feet.

Recommended Retention: Five calendar years after completion of form.

Planned Giving - Insurance Files.

Summary: Original insurance policies that designate the Foundation as beneficiary.

Extent: 8 cubic feet.

Recommended Retention: Transfer to storage one year after closure. An insurance file is closed when all death benefits have been collected. Retain ten years then destroy.

UFF FUND RAISING AND DEVELOPMENT--Continued

Donor Files - Corporate.

Summary: Information on corporations and foundations, including gift agreements, gift documentation (such as Daily Gift Reports, donor correspondence and thank you letters), older contact records not in Advance, news articles, research reports, and company information (such as annual reports). The master record for this series is held in Research

Extent: 172 cubic feet.

Recommended Retention: Retain for the life of the organization. Transfer to microfilm as appropriate.

Donor Files - Individuals.

Summary: Information on donors and prospective donors, including President's Council Reports, gift agreements, gift documentation (such as Daily Gift Reports, donor correspondence and thank you letters), older contact records not in Advance, news articles (such as obituaries) and research reports. The master record for this series is held in Research

Extent: 100 cubic feet.

Recommended Retention: Retain for the life of the organization. Transfer to microfilm as appropriate.

Donor/Prospect Files - Central Staff.

Summary: Information on donors and prospective donors as well as gift information, including asset transmittals. The series is arranged by name of donor and is filed with the vice presidents and development officers within the main Foundation offices.

Extent: 196 cubic feet.

Recommended Retention: Transfer to Research to be maintained with Donor and Prospect files.

Gift Agreement Files.

Summary: The master record for the original agreement between donors and the Foundation, which documents gifts and pledges, including gifts and pledges for endowed funds and for those over a certain amount. Maintained in the Office of the Associate Vice President for Administration, and arranged alphabetically by donor name. This series is a vital record for the Foundation.

Extent: 33 cubic feet.

Recommended Retention: Permanent, when no longer needed in the office, transfer to Archival Storage.

Major Gift Reports.

Summary: This series contains reports issued by the Board of Regents, documenting fund-raising activities of institutions in the State University System.

Recommended Retention: Three fiscal years.

UFF FUND RAISING AND DEVELOPMENT.—Continued

UF Alumni Association - Gator Clubs Records.

Summary: Non-financial information about the individual Gator Clubs throughout the world.

Extent: 10 cubic feet.

Recommended Retention: Retain three calendar years.

UF Alumni Association - Alumni Program Files.

Summary: Documents directory information and management of events, reunions, pre-game parties and the Speakers Bureau.

Extent: 10 cubic feet.

Recommended Retention: Retain three calendar years.

UF Alumni Association - Membership Program Files.

Summary: Documents the management of programs for members of the Alumni Association and includes statistical information and documentation of original solicitations.

Extent: 12 cubic feet.

Recommended Retention: Retain three calendar years.

Prospect Files - Corporate—Miscellaneous/Research.

Summary: Information on possible corporations and foundations where no contact has been made. Material is usually very limited.

Recommended Retention: Discard after five calendar years.

Prospect Files - Individual—Miscellaneous/Research.

Summary: This series contains information on possible individual donors where no contact has been made. Material on individuals is very limited.

Recommended Retention: Discard after five calendar years.

Reports - Computer Generated.

Summary: Reports generated from the Advance system and includes weekly gift reports, weekly Alumni Association membership reports, annual giving monthly reports, quarterly reports to development officers and fund administrators and ad hoc reports requested by the Computing Services Data Request Form.

Recommended Retention: Retain one fiscal year, file summary reports and discard interim reports.

Reports - Research.

Summary: Generated by Research containing donor and prospect information.

Recommended Retention:

Master Copy: Filed in Research in individual or corporate donor files.

Duplicates: Destroy as a NAP.

LEGAL

Insurance Records.

Summary: Safety reports and policies held by the Foundation, such as fire, theft, medical, and liability, including claim filing information and premium payment records including fire, theft, medical, and life.

Extent: 2 cubic feet.

Recommended Retention: Five calendar years after expiration or cancellation of policy.

Gator Boosters Legal Files.

Summary: Contracts, agreements, policies and procedures dealing with Gator Boosters, Inc., arranged by subject.

Extent: 2 cubic feet.

Recommended Retention: Life of contract or agreement plus 5 calendar years.

All others transfer to storage and destroy when obsolete.

Research Files.

Summary: Information that is or may be of interest to the Legal Affairs Department.

Arranged by topic.

Extent: 19 cubic feet.

Recommended Retention: Destroy as a NAP.

Royalty Agreements.

Summary: Documents agreements between vendors and the Foundation or the UF Alumni Association where the Foundation or UFAA benefits from lending names or lists of members for the purpose of sale of services or merchandise.

Extent: 2 cubic feet.

Recommended Retention: Life of agreement plus 5 calendar years.

UFF/UFAA Contracts Over \$5,000.

Summary: Documents contracts entered into by the Foundation or the UF Alumni Association in excess of \$5,000.

Extent: 6 cubic feet.

Recommended Retention: Life of contract plus 5 calendar years.

UFF/UFAA Contracts for \$5,000 or Less.

Summary: Documents contracts entered into by the Foundation of the UF Alumni Association for \$5,000 or less. These are generally one-time or annual event contracts.

Extent:

Recommended Retention: Current year plus 1 calendar year, then destroy as NAP.

Real Estate Files.

Summary: Documents the receipt, management and sale of property donated and owned by the Foundation. Consists of legal documents such as deeds and mortgages, surveys, appraisals and correspondence.

Extent: 110 cubic feet.

Recommended Retention: Fifteen years after disposal of property.

Documentation of the original gift should be transferred to the appropriate gift records.

Wills and Trusts Files.

Summary: Copies of wills and trusts that designate the Foundation as beneficiary. Arranged alphabetically by individual's name. This series goes through three stages. When the individual is living, it is filed in the Planned Giving Office where contacts with donors are documented. Once the individual is deceased, it is transferred to the Legal Department for processing. There it remains an active file until the assets are received. The file is then closed.

Extent: 25 cubic feet (including files in Planned Giving).

Recommended Retention: Transfer to storage one fiscal year closure. Retain ten years after closing then destroy. Documentation regarding the purpose of the original gift should be transferred to the appropriate gift records.

PAYROLL.

1099 Reports.

Summary: Annual Reports for the Internal Revenue Service documenting the hiring of independent contractors by the Foundation. Master record kept in Finance and Accounting.

Recommended Retention:

Master Record: Four years after filing of final tax return for that year.

Duplicates: Destroy as NAP.

Payroll Records.

Summary: Records posted to employee files that are used to document payment during employment, including rate of pay and any changes. Master record for this series is in Human Resources.

Extent: 17 cubic feet.

Recommended Retention:

State Employees: Destroy as a NAP.

Foundation Employees: Four fiscal years after filing of final tax return for that year.

HUMAN RESOURCES.

Attendance Records - State Employees.

Summary: Attendance and leave reports for each State of Florida employee for each pay period.

Recommended Retention:

Record copy in Human Resources. 2 fiscal years provided posted to “Employee Leave Index Records”.

Duplicates: Destroy as a NAP.

Attendance Records - Foundation Employees.

Summary: Attendance and leave reports for each Foundation employee for each pay period.

Recommended Retention:

Record copy in Human Resources. Two fiscal years provided posted to employee file.

Duplicates: Destroy as a NAP.

Attendance Records - OPS/Temporary Employees.

Summary: Time cards and a compilation of these time cards for OPS employees.

Recommended Retention:

Record copy in Human Resources: Three fiscal years after termination.

Duplicates: Destroy as a NAP.

Flexible Benefits Fund File.

Summary: Copies of claims made by employees under medical coverage.

Extent: 2 cubic feet.

Recommended Retention: Five fiscal years after final disposition of claim.

Personnel Records - OPS/Temporary Employee.

Summary: All information relating to OPS or temporary employees working within the Foundation. Records may include an employment application, personnel actions and any correspondence related to the employee.

Extent: 15 cubic feet.

Recommended Retention: Three fiscal years after termination.

Duplicates: Destroy as a NAP.

Personnel Records - State Employees - Not Vested.

Summary: Employee files of individuals on State payroll who are not vested in the State’s retirement plan. The University of Florida Personnel Division manages the Master record for this series.

HUMAN RESOURCES.—Continued.

Recommended Retention:

Human Resources copy: Five fiscal years after termination of employment provided no litigation is pending.

Duplicates: Destroy as a NAP.

Personnel Records - State Employees - Vested.

Summary: Employee files of individuals on State payroll, who are vested in the State's retirement plan. The University of Florida Personnel Division manages the Master record for this series.

Recommended Retention:

Personnel copy: Five fiscal years after last pension payment.

Duplicates: Destroy as a NAP.

Personnel Records - Foundation Employees - Not Vested.

Summary: Employment records of individuals who have been employed by the Foundation for less than five years.

Recommended Retention:

Master record is in Human Resources. Five fiscal years after termination of employment.

Duplicates: Destroy as a NAP.

Personnel Records - Foundation Employees - Vested.

Summary: Employment records of individuals who have been or were employed by the Foundation for five years or more, or who are otherwise vested in the Foundation's retirement plan.

Recommended Retention:

Master record is in Human Resources. Five fiscal years after last pension payment.

Duplicates: Destroy as a NAP.

Position Search Records.

Summary: Resumes, applications, interview schedules, references and affirmative action information.

Recommended Retention:

Master record is in Personnel: Three fiscal years after position is filled.

Duplicates: Destroy as a NAP.

PUBLICITY & PUBLIC EVENTS

Publication History File.

Summary: A copy of all publications issued by the office as well as summary data as to cost, vendors used and photographs (if not maintained in a separate file.)

Recommended Retention: Retain until obsolete then transfer to Archival Storage.

Campaign Case Statement Files.

Summary: Materials used in the development and printing of campaign statements for the colleges and units. Materials include paste-ups, copy, graphics, cost sheeting, and vendor correspondence. Filed by name of college or unit and date published.

Extent: 3 cubic feet.

Recommended Retention: 5 calendar years after superseded then destroy. Transfer examples of publications to the Publication History Files and the Campaign File - Historical.

Photographic Files.

Summary: Photographs used in publications or press releases. Arranged alphabetically by name, subject or place. Sources of the photographs include the University News and Public Affairs and the colleges and units.

Extent: 5 cubic feet.

Recommended Retention: Keep in Publications Office until obsolete then transfer to Archival Storage.

Project Files.

Summary: Documents and information gathered during the planning and implementation of a particular publication; documents the development of publications such as *Florida* and the President's Council Newsletter. Materials include paste-ups, copy, graphics, cost sheeting, and vendor correspondence. Filed by title of publication and date published.

Extent: 30 cubic feet.

Recommended Retention: Three calendar years after publication date then transfer historical information to the Publication History File.

Reference Files.

Summary: Reference information useful in developing publications including examples of publications from other development offices.

Extent: 1 cubic foot.

Recommended Retention: Destroy as a result of NAP.

VII. READING FILES

Reading Files.

Summary: Copies of all outgoing correspondence with enclosures filed chronologically.

A copy of the correspondence is also filed with the appropriate file.

Extent: N/A—files located in various departments.

Recommended Retention: Three calendar years.