

# Duke University Records Retention Guidelines (DRAFT)

**Category Description:**                **Development and Alumni Affairs Records**—records which document giving, fundraising activities, and activities and programs for alumni

Series Title	Content	Minimum Retention	Notes
Advance database	Electronic record keeping system used to track alumni and other donors' giving and to track potential donors; includes alumni and donor demographic data, contact information, biographical data, giving histories, etc.	Update as necessary and purge obsolete data when no longer useful	Also see Donor files
Alumni programs	Information concerning programs such as alumni admissions, education and travel, etc.	See recommendations for disposition of programmatic records in <a href="#">Administrative &amp; Management Records</a> guidelines; see recommendations for disposition of admissions records in <a href="#">Student Records</a> guidelines.	FERPA
Annual operating plans	Annual operating plans for specific development offices, with supporting financial data	5 years; transfer to Archives (Contact Archives prior to transfer of electronic records)	See guidelines for <a href="#">Administrative &amp; Management Records</a> for instructions on disposing of other reports and planning documents
Campaign materials	Case statements, brochures, videos, summaries of activities/ progress/ accomplishments, etc.	Administrative value ends; transfer to Archives (Contact Archives prior to transfer of electronic records)	
Donor files	Information concerning donors and prospective donors; includes primarily correspondence and acknowledgements (paper or email) of gifts	Administrative value ends; destroy/purge	Also see Advance database  Administrative value may end sooner if information in file can be replicated from Advance database
Fund development	Endowment reports, correspondence and email with donors, agreements, fund statistics, information on restrictions, etc.	Administrative value ends; destroy/purge	

Gift records	Records of financial gifts given for Annual Fund, campaigns, planned giving, etc.	Follow applicable guidelines in <a href="#">General Accounting Procedure 200.240</a> , Retention Periods for Accounting Records	
Nominations	Nominations for distinguished alumni awards	Administrative value ends; destroy/purge	
Special events	Promotional material and brochures, guest lists, photos and/or proof sheets, planning reports, meeting notes, invitations, financial data, presentations and other records concerning reunions, alumni weekend, fundraising events, kickoffs, etc.	Contact Archives about transfer of special events records and/or transfer of electronic records  Follow applicable guidelines in <a href="#">General Accounting Procedure 200.240</a> , Retention Periods for Accounting Records, for disposition of fiscal records	