



Retention Periods for General Categories of Retainable Records

RECORD CATEGORY	RETENTION PERIOD*
Electronic Mail	120 days**
Voice mails	None
ADMINISTRATIVE RECORDS	
<i>Boards and Other Governance Committees and Meetings</i>	
Proceedings of Board Meetings, Board committees and administrative reports to Board Committees	Permanent
Records of other committees and meetings	5 years
Conflict of interest disclosures	Permanent
Corporate Compliance Audit Findings	Permanent
<i>General</i>	
General Correspondence and chronological files	6 years (For correspondence with regulatory agencies, current + 6 years)
Affiliation Agreements	6 years beyond termination date
Feasibility Studies	Active + 1 year but not less than 6 years in total
Organization Charts	3 years
Contracts	10 years after termination
Insurance policies	Permanent
Patent, trademark and other intellectual property records	Permanent
Litigation, claims, risk management, incident reports	10 years
COMMUNICATIONS/PR	
Press clippings, TV/radio transcripts	6 years
Press releases, advertising	6 years
DEVELOPMENT	
Funding materials	5 years after end of registration period
Endowment records	Permanent
Donor-restricted funds records	Permanent
All other development records	10 years
FINANCE AND TAX	
External Audit Reports	Current year + 10 years
Budget Workpapers	Current year + 6 years
Financial Statements	Current year + 10 years after audit
Financial Reports and Workpapers	Current year + 6 years
Collection Records	Tax return due date or date of filing if later + 10 years after audit