

Advancement | UCF Foundation, Inc.

Records Management Policy

Policy# 3.05

Effective Date: 10/20/2020

Responsible Department: Executive

1. PURPOSE

This policy institutes procedures for complying with requirements related to retention, management, and disposal of records in accordance with federal and state regulations.

2. APPLICABILITY

All University of Central Florida Foundation, Inc. (Foundation) employees or University of Central Florida (University) employees acting on behalf of the Foundation.

3. POLICY

The Foundation follows the University's policy for records management, as set forth below. Documents that are not detailed on a retention schedule may be destroyed when the documents have lost their institutional value and in accordance with the destruction processes as set forth in the University's policy.

4. RELATED DOCUMENTS

University Policy 2-003 Records Management

<https://policies.ucf.edu/documents/2-003.pdf>

Records Management Liaison Officer and Records Management Advisory Board

<http://admfin.ucf.edu/records-management>

5. CLARIFICATION

Requests for clarification of this policy should be sent to the Associate Vice President and Chief Operating Officer.

Michael Morsberger

Digitally signed by Michael

Morsberger

Date: 2020.11.17 15:46:57 -05'00'

Name: Michael J. Morsberger

Title: Vice President for Advancement and Chief Executive Officer

Revision History:

Adoption Date:

Revised: October 2020

History: