

# Guide to the Controller, Yale University, Records

RU 724



compiled by Daniel Hartwig

June 2007

Yale University Library  
P.O. Box 208240  
New Haven, CT 06520-8240  
(203) 432-1735  
(203) 432-7441

[beinecke.library@yale.edu](mailto:beinecke.library@yale.edu)

<http://www.library.yale.edu/mssa/>

---

## Table of Contents

Collection Overview .....	3
Requesting Instructions .....	3
Administrative Information .....	3
Conditions Governing Access .....	3
Preferred Citation .....	4
Scope and Contents .....	4
General note .....	4
Arrangement .....	4
Collection Contents .....	5
Accession 1982-A-048: Records, 1968-1980 .....	5
Accession 1985-A-036: Records, 1970-1984 .....	6
Accession 2002-A-015: Financial and audit records, circa 1979-2000 .....	7
Accession 2005-A-128: Administrative and financial records, 1962-2002 .....	9
Accession 2013-A-077: Records of the Office of Gift Administration, 1977-1999, bulk 1985-1999 .....	10
Accession 2014-A-013: Records of the Office of Gift Administration, 1703-2003 .....	13
Selected Search Terms .....	14

---

## Collection Overview

**REPOSITORY:** Manuscripts and Archives  
Yale University Library  
P.O. Box 208240  
New Haven, CT 06520-8240  
(203) 432-1735  
(203) 432-7441  
beinecke.library@yale.edu  
<http://www.library.yale.edu/mssa/>

**CALL NUMBER:** RU 724

**CREATOR:** Yale University. Office of Finance and Administration

**TITLE:** Controller, Yale University, records

**DATES:** 1703-2003

**PHYSICAL DESCRIPTION:** 76.75 linear feet

**LANGUAGE:** English

**SUMMARY:** The records consist of financial records, committee notes, and correspondence documenting the activities of the Yale controller (formerly comptroller).

**ONLINE FINDING AID:** To cite or bookmark this finding aid, please use the following link: <https://hdl.handle.net/10079/fa/mssa.ru.0724>

---

## Requesting Instructions

To request items from this collection for use in the Manuscripts and Archives reading room, please use the request links in the HTML version of this finding aid, available at <https://hdl.handle.net/10079/fa/mssa.ru.0724>.

To order reproductions from this collection, please go to [http://www.library.yale.edu/mssa/ifr\\_copy\\_order.html](http://www.library.yale.edu/mssa/ifr_copy_order.html). The information you will need to submit an order includes: the collection call number, collection title, series or accession number, box number, and folder number or name.

Key to the container abbreviations used in the PDF finding aid:

b.      box  
f.      folder

---

## Administrative Information

---

### Conditions Governing Access

Access to the records is restricted. See inventory for details

Some records in this finding aid have been redacted, as they include student names, donor names, and other restricted data. These records will not appear in the published finding aid.

---

## **Preferred Citation**

Controller, Yale University, Records (RU 724). Manuscripts and Archives, Yale University Library

---

## **Scope and Contents**

The records consist of financial records, committee notes, and correspondence documenting the activities of the Yale controller (formerly comptroller)

---

## **General note**

Forms part of Yale Record Group 5-B (YRG 5-B), Accounting records and records of the Yale comptroller.

---

## **Arrangement**

The records are arranged by accession

## **Collection Contents**

### **Accession 1982-A-048: Records, 1968-1980**

No online inventory available. Paper inventory available in repository

Restricted until Jan 1, 2016

b. 1-2

**Accession 1985-A-036: Records, 1970-1984**

Restricted until Jan 1, 2019

b. 2	Yale College Policy Committee	1975-1976
b. 2	American Council on Education	1969-1979
b. 2	Connecticut, State of	1973-1974
b. 2	Consortium on Financing Higher Education: Amhurst, Brown, Dartmouth, Harvard, MIT, Mt. Bolyoke, Princeton, Wellseley, Wesleyan, Yale	1974-1978

## Accession 2002-A-015: Financial and audit records, circa 1979-2000

Restricted until Jan 1, 2035

b. 6	Divinity School Financial Statements/work papers	1994-1998
b. 6	\$16.5 million term loan with Yale Club of New York City - 50 Vanderbilt Avenue	1997 March 18
b. 9	Correspondence	1986-1991
b. 10	Yale University Financial Statements	1979-1996
b. 10	Yale University Management Letter	1982-1998
b. 10	Yale Medical School Parking Lot Financial Statements	1985-1988
b. 10	Yale Psychiatric Institute Management Letter	1986- 1992
b. 10	Yale Psychiatric Institute Financial Statements	1986-1994
b. 10	National Science Foundation Grant for Yale Southern Observatory, Inc. FY 1995 Statement	
b. 10	Yale OMB Circular A-133 Report	1993-1998
b. 11	1973-1981	
b. 14	1994	
b. 14	1990	
b. 14	1989	
b. 14	1992-1993	
b. 15	Miscellaneous	
b. 15	1996	
b. 15	Yale University Press	
b. 16	1994	
b. 16	1992	
b. 16	1993	
b. 16	1995	
b. 16	1996-1997	
b. 17	Yale University Press	1998
b. 18	Yale Book of Numbers - Historical Statistics of the College and University 1701-1976	
b. 20	New Haven Initiative	
b. 20	Yale University Financial Statements	1992 June 30

b. 21	Annual Financial Statements and related work papers	1995
b. 22	Yale University Financial Statements and related work papers - all documents	1996
b. 23	Yale University Financial Statements and related work papers	1997
b. 24	Yale University Financial Statements and related work papers	
b. 25	Yale Financial Statements and related work papers	1998
b. 26	Medical School correspondence	1994
b. 26	Annual Report work papers	1991
b. 32	Annual Pension Actuarial Valuation Report	1979-1985
b. 36	1996	
b. 36	1997	
b. 36	1998	
b. 36	1995	
b. 37	Commercial Paper	1997-1999



## Accession 2005-A-128: Administrative and financial records, 1962-2002

Restricted until Jan 1, 2078

b. 15, f. 74	Yale development wire reconciliations	2001
b. 24, f. 103	Yale Press 2002-2003 Employee Benefits	2002-2003
b. 25, f. 104	1995 Unclaimed Property - 1999 Filing	1998-1999
b. 25, f. 105	1996 Unclaimed Property - 2000 Filing	1996-1997
b. 25, f. 106	1997 Unclaimed Property - 2001 Filing	1999-2000
b. 26, f. 120	1986 checks	1985-1986
b. 26, f. 121	1988 checks	1987-1988
b. 26, f. 122	1995 Escheat A/P - escheat to state	1994-1995
b. 26, f. 123	1995 payroll escheat reissued checks	1994-1995
b. 26, f. 124	1996 Escheat A/P - escheat to state	1995-1996
b. 26, f. 125	1996 Escheat payroll - reissued checks	1995-1996
b. 26, f. 126	1997 escheat A/P escheat to state	1996-1997
b. 26, f. 128 - 130	Disbursements	1997-1998
b. 26, f. 131	Disbursements - letters of inquiry awaiting replies	1997-1998

## Accession 2013-A-077: Records of the Office of Gift Administration, 1977-1999, bulk 1985-1999

Use of the UFMIS-Oracle conversion source numbers in box 35 is required to use the microfiche in this accession.

Microfiche records of the Office of Gift Administration includes: Consolidated Financial Statements; Detailed Transactions by Dept/Fund Sequence; Fund Summary Statements; General Ledger; Year-to-Date Income and Expense; Remaining Balance of Restricted Funds; Remaining Fund Balance; General Appropriations Operating Statements by University, School and Department, 1977-1999 (bulk 1985-1999). Also includes code key binder.

Restricted to Office of Origin only

b. 1	1985 June-1986 March	1985 June-1986 March
b. 2	1986 April-1986 September	1986 April-1986 September
b. 3	1986 October-1987 April	1986 October-1987 April
b. 4	1987 June-1987 October	1987 June-1987 October
b. 5	1987 November-1988 May	1987 November-1988 May
b. 6	1988 June-1988 September	1988 June-1988 September
b. 7	1988 October-1989 March	1988 October-1989 March
b. 8	1989 April-1989 June	1989 April-1989 June
b. 9	1989 July-1990 January	1989 July-1990 January
b. 10	1990 February-1990 June	1990 February-1990 June
b. 11	1990 July-1991 January	1990 July-1991 January
b. 12	1991 February-1991 June	1991 February-1991 June
b. 13	1991 July-1992 January	1991 July-1992 January

b. 14	1992 February-1992 June	1992 February-1992 June
b. 15	1992 July-1993 January	1992 July-1993 January
b. 16	1993 February-1993 July	1993 February-1993 July
b. 17	1993 July-1993 December	1993 July-1993 December
b. 18	1994 January-1994 May	1994 January-1994 May
b. 19	1994 June-1994 September	1994 June-1994 September
b. 20	1994 October-1995 March	1994 October-1995 March
b. 21	1995 April-1995 July	1995 April-1995 July
b. 22	1995 August-1996 January	1995 August-1996 January
b. 23	1996 February-1996 May	1996 February-1996 May
b. 24	1996 June-1996 September	1996 June-1996 September
b. 25	1996 October-1997 February	1996 October-1997 February
b. 26	1997 March-1997 May	1997 March-1997 May
b. 27	1997 June-1997 August	1997 June-1997 August
b. 28	1997 September-1998 January	1997 September-1998 January
b. 29	1998 February-1998 May	1998 February-1998 May
b. 30	1998 June-1998 August	1998 June-1998 August

b. 31	1998 September-1999 January	1998 September-1999 January
b. 32	1999 February-1999 May	1999 February-1999 May
b. 33	1999 June	1999 June

### **Accession 2014-A-013: Records of the Office of Gift Administration, 1703-2003**

Accession 2014-A-013 consists of treasury indentures (now called abstracts) from the Office of Gift Administration which documents a donor's intent/restrictions/preferences on how his/her restricted gift is to be used by the University. Endowment funds are kept in perpetuity.

Restricted to Office of Origin only

## **Selected Search Terms**

The following terms have been used to index the description of this collection in the Library's online catalog. They are grouped by name of person or organization, by subject or location, and by occupation and listed alphabetically therein.

### **Subjects**

Universities and colleges -- Finance

### **Corporate Bodies**

Yale University. Office of Finance and  
Administration  
Yale University -- Finance