



Gift/Grant Determination Form

Gift administered by University Advancement (UA) • Sponsored project administered by ORSP

PI/RECIPIENT

FUNDER

COLLEGE/DEPT/CENTER/INSTITUTE

PROJECT TITLE

The substance of the transaction determines the treatment, regardless of the funder's terminology of gift, award, grant, or contract. The information needed to make a determination will be found in these documents:

- Proposal or request presented to the funder that includes a statement of work or project description and/or any budget information
- Award or agreement document that defines funder expectations and terms & conditions

Review the documentation and answer every question below.

Section 1 — Funder Type

YES NO

1. Is the Funder, either directly or flowed through from another entity, a branch of a domestic or foreign federal, state, or local government?

☐ ☐

Section 2 — Funder Benefit

YES NO

2. Does the Funder gain direct economic benefit or other benefits as a result of the university's activities?

☐ ☐

- Ownership or disposition of tangible or intangible property
- Restrictions on the publication of data

Section 3 — Funder Involvement

YES NO

3. Does the funding document restrict spending to a future period or milestone completion?

☐ ☐

4. Does the funding document stipulate the method of payment as cost reimbursable?

☐ ☐

5. Does the funding document stipulate a cost sharing commitment of the university's resources?

☐ ☐

6. Does the funding document specify adherence to a line-item budget with the specific restrictions listed below?

☐ ☐

- Prior approval of pre-award costs
- Rebudgeting authority between budget categories
- Carryforward from one budget period to another

7. Does the funding document require an authorized signature stipulating research compliance certification?

☐ ☐

8. Is the Funder involved in how funds are administered?

☐ ☐

- Preapproval of detailed project plan
- Choice of student or individual receiving the funds
- Ability to transfer funds to another institution

If YES to any question: the funding is a sponsored project (ORSP).

If NO to every question: the funding is a gift and is considered general programmatic support (UA).

Determination

☐ Gift through Advancement

☐ Sponsored Project through ORSP

☐ Unable to Determine

Completed by:

Date:

If you have questions about the analysis, or you are unable to determine whether the funding is a gift or a grant/sponsored project, forward the documentation to the Vice Chancellor for University Advancement and the Director of ORSP for consideration. If a determination still cannot be made, Administration & Finance, via the Controller, will make the final determination.