



### Checklist for determining whether funding is support for a Sponsored Project or a Gift

PI/Recipient: \_\_\_\_\_ Dept: \_\_\_\_\_ Date: \_\_\_\_\_

Sponsor/Donor: \_\_\_\_\_ Project Date: \_\_\_\_\_ Amount: \_\_\_\_\_

#### Instructions:

Answer all eight questions below and include comments when necessary. To use this form, review all documentation associated with the funding for indications that will help determine whether the funding should be considered support for a sponsored project or a gift.

Documentation may include some or all the following items:

- 1. Statement of work or project description
- 2. Proposal, letter of intent, or request for funding, including budget
- 3. Award letter
- 4. All correspondence

#### Checklist:

1	Is the funding from the government at the federal, state, or local level?	If Yes, this is a SPONSORED PROJECT		
2	Is the funding from an individual (not an organization)? Comments:	If yes, this is a GIFT.		
IF NEITHER OF THE ABOVE ARE YES, DOES THE SPONSOR/DONOR REQUIRE:		YES	NO	UNCERTAIN (Explain)
3	Statement of work (commitment to a specific project plan, as opposed to a general field of Study or research area: the commitment describes a specific line of scholarly inquiry such as testing of hypotheses, experiments, model project, or defined set of deliverables)? Comments:			
4	Detailed line-item budget for work (e.g., commitment of percentage of effort)? Comments:			
5	Commitment of University resources (e.g., required cost share)?			
6	Return of unexpected funds at end of designated period. (e.g., "Start" and "Stop" dates):			
7	Detailed financial reporting beyond summary report of expenditures (e.g., line-item detail, percentages of effort, required cost share)?			
8	Terms and conditions for disposition of tangible property (e.g., equipment, records, technical Reports, theses, dissertations, or other deliverables)? Comments:			
9	Terms and conditions for disposition of intangible property (e.g., intellectual property, rights in data, copyrights)? Comments:			

Check one box and process accordingly.

- Sponsored Project: If you answered **"Yes"** to Question 1 or to any of questions 3-9, the completed Checklist, along with supporting documentation, should be sent to the Office of Sponsored Programs (OSP).
- Gift: If you answered **"Yes"** to Questions 2 or **"No"** to **all** of questions 3-9, the funding should be considered a gift. Forward the completed Checklist, along with supporting documentation, and completed Gift Transmittal Form to Gift Processing.
- Uncertain: If you **cannot** answer any one question with certainty, review with Dean's Office and with Office of Sponsored Programs (OSP), who will coordinate with the Controller's Office and Development Office. If the funding is determined to be a sponsored project, attach a signed copy of this Checklist to the award documentation and forward to OSP. If the funding is determined to be a gift, attach a signed copy of this Checklist, indicating the final determination, to Gift Processing.

Initial Department determination made by: \_\_\_\_\_ Date: \_\_\_\_\_

If consultation is needed, Dean's Office representative: \_\_\_\_\_ Date: \_\_\_\_\_

Office of Sponsored Programs representative: \_\_\_\_\_ Date: \_\_\_\_\_

Controller's Office Representative: \_\_\_\_\_ Date: \_\_\_\_\_

Development Office Representative: \_\_\_\_\_ Date: \_\_\_\_\_

Determination:      Sponsored Programs \_\_\_\_\_      Gift \_\_\_\_\_