

# Gift or Sponsored Project Checklist

Answer questions in the checklist below, and include comments whenever necessary. Review all the documentation associated with the funding for indications that will help you to determine whether the funding should be considered support for a sponsored project or a gift. Documentation may include some or all of the following items: a Statement of Work or Project Description, a Proposal or Letter of Intent, or request for funding including budget, or an Award Letter.

Sponsor / Donor

Principal Investigator

Project Title

## FUNDING SOURCE

YES	NO	
		Is the funding provided by the U.S. Government, at the federal, state, or local level? If yes, this is a sponsored project.
		Is the funding provided by an individual (not an organization)? If yes, this is a gift.

Comments

## OTHER CONSIDERATIONS

If neither of the above are true, consider the following questions.

YES	NO	UNSURE	Comments
			Is this funding to accomplish a specific Statement of Work (a 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 a hypothesis, experiments, a model project or a defined set of deliverables)?
			Is there a detailed line item budget for salary (e.g., commitment of percentage of effort)?
			Does the funding agreement require return of any unexpended funds at the end of a designated period (i.e., "Start" and "Stop" dates)?
			Does the funding agreement require detailed financial reporting beyond a summary report of expenditures (i.e. line item detail, percentages of effort)?
			Does the funding agreement include terms and conditions for the disposition of tangible property (i.e. equipment, records, technical reports, theses, dissertations, or other deliverables)?
			Does the funding agreement include terms and conditions for the disposition of intangible property (i.e. intellectual property, rights in data, copyrights)?

Check one box below, and process accordingly.

**Sponsored Project:** If you answer "Yes" to Question 1, or if most of the responses from questions 3 – 8 are "Yes," the funding is for a sponsored project. Keep the completed checklist in your departmental project file, and notify Sponsored Programs to create a KCRM record.

**Gift:** If you answer "Yes" to Question 2, or if most of the responses from questions 3 – 8 are "No," the funding is a gift. Send the completed checklist with any supporting documentation to the Gifts And Estate Planning office.

**Uncertain:** If you cannot determine with certainty, review with your school dean's office and then with the Office of Sponsored Programs (OSP) or Post Award Financial Operations (PAFO).

These offices may also confer for final resolution.