



Distinguishing Gifts vs. Grants Checklist

PI: _____ Department: _____

Project title (if applicable): _____

Sponsor/Donor: _____ Amount: _____

This checklist is a job aid intended to provide guidance to assist in determining if a transaction is a research gift or grant. For additional information, see OBFS Policies and Procedures, section 11, as well as the associated Frequently Asked Questions and Table of Indicators.

Review all funding documentation available and answer the questions below.

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|----|--|-----|----|
| 1. | Is the funding provided by the government (federal, state, or local)? | Yes | No |
| | If yes, stop here. The funding will typically be processed as a grant, but there might be special circumstances in which it should be categorized as a gift. Please consult with SPA or the Foundation if you have any questions. | | |
| 2. | Is the university committed to perform a specific project detailed in a research plan or statement of work, as opposed to a general field of study or research? | Yes | No |
| 3. | Is there a specific commitment regarding level/percentage of effort for faculty or personnel, or an obligation to spend a certain amount of time on the project? | Yes | No |
| 4. | Is the university required to provide detailed financial reporting beyond a brief summary of how the funds are spent? | Yes | No |
| 5. | Is the university required to return unspent funds at the end of the work? | Yes | No |
| 6. | Is the university obligated to provide deliverables, like reports, research results, study data, or other tangible items? | Yes | No |
| 7. | Are there any publication restrictions? | Yes | No |
| 8. | Is the sponsor/donor requesting rights to intellectual property? | Yes | No |

If you answered yes to any question 2-8, the funding should be processed as a grant. Otherwise, it should be processed as a gift.

Gifts are processed by the University of Illinois Foundation – giftadmin@uif.uillinois.edu

Grants are processed by Sponsored Programs Administration – spa@uillinois.edu
