



## 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.

1. Is the funding provided by the government (federal, state, or local)?      Yes      No

**If yes, stop here. The funding should be processed as a grant. If no, continue to questions 2-8.**

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 can be processed as a gift.**

Gifts are processed by the University of Illinois Foundation – [giftadmin@uif.uillinois.edu](mailto:giftadmin@uif.uillinois.edu)

Grants are processed by Sponsored Programs Administration – [spa@uillinois.edu](mailto:spa@uillinois.edu)

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