**Questionnaire**

Charitable Contribution (“gift”) or

Sponsored Award (“grant”)

*updated: April 2023*

This questionnaire is a job aid to help determine if funding is a charitable contribution (gift) or a sponsored award (grant). Please read the *Guidelines on Determining Types of Contributions to the University* before completing this questionnaire.

1. Is the funding provided by federal, state, or local government?

[ ] Yes

[ ] No

**If yes, stop here. The funding should be processed as a grant. If no, continue to questions 2-11.**

2. Does the funding include a statement of work that commits to a specific project plan?

[ ] Yes

[ ] No

3. Is there an expectation of deliverables to the donor/grantor?

[ ] Yes

[ ] No

4. Is there a time period associated with use of funds or are there clearly defined “start” and “end” dates?

[ ] Yes

[ ] No

5. Are there situations where funds may need to be returned to the donor/grantor?

[ ] Yes

[ ] No

6. Does the donor/grantor retain rights to licensing and/or intellectual property?

[ ] Yes

[ ] No

7. Does the donor/grantor request control of publications?

[ ] Yes

[ ] No

8. Does the donor/grantor receive something of value in exchange for the funds?

[ ] Yes

[ ] No

9. Does the donor/grantor require a line-item budget that identifies expenses by activity, function, or project period?

[ ] Yes

[ ] No

10. Is renewal of funding contingent on such things as technical review or satisfactory progress?

[ ] Yes

[ ] No

If you answered “Yes” to one or more of questions 2-9, the funding should likely be processed as a sponsored award (grant). Otherwise, the funding should likely be processed as a charitable contribution (gift). If you believe the funding is a sponsored award (grant), please reach out to the Office of Research and Sponsored Programs at inors@lehigh.edu. If you believe the funding is a charitable contribution (gift), please reach out to Development & Alumni Relations at askrecords@lehigh.edu. There are rare instances when funds received from outside sources are neither Charitable Contributions nor Sponsored Awards. These cases are not processed through DAR or ORSP. Please check with the Controller’s Office for assistance on these “other” types of awards at inctr@lehigh.edu.

**Initial Department Determination:**

* [ ] Sponsored Award (grant)
* [ ] Charitable Contribution (gift)

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

Department head endorsement made by: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_

**Office of Research & Sponsored Programs Determination:**

* [ ] Sponsored Award (grant)
* [ ] Charitable Contribution (gift)

ORSP determination made by: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_

**Development & Alumni Relations Determination:**

* [ ] Sponsored Award (grant)
* [ ] Charitable Contribution (gift)

Development determination made by: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_