Gift Determination and Processing

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Working Group Formed to Review
Gift vs. Sponsored Project Policy & Process

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Working Group Formed to Review Gift vs. Sponsored Project Policy & Process

A series of meetings were held with the goal of developing......

✓ a more consistent approach
✓ based on a smoother and quicker determination process
✓ resulting in proper classification

Group Challenges

- We reviewed a number of awards using the current determination process; we struggled for consensus on the classification of gift vs. sponsored project
- As a result, we determined the current determination process needed to be reevaluated
- A sub-group was formed to develop recommendations for revisions to policy and process
New Approach to Determination

Proposal Commitments
Broad research focus described vs. Detailed scope of work or specific line of inquiry

Award Terms
Are there requirements for deliverables, rights to intellectual property, control of publications, or other questionable terms

Proper Classification

Reporting Requirements
Requirement for a general report on disposition of funds and general description of progress vs.
Detailed line-item financial report And detailed technical report of results

Updates to Definition of Gift (RPH 13.1)

✓ Policy now clarifies that a proposal/request can be submitted to a potential donor

✓ The determination process now focuses on the terms of the award

✓ Period of performance and return of unspent funds are no longer (by themselves) an indication that funding must be accepted as a sponsored project

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Conditions of Gift Award Template

- Recommended for gifts from donors, including “industry” sponsors. Establishes mutual understanding:
  - Intellectual property or data will be retained by Stanford
  - Stanford will provide acknowledgement of funding in publications
  - Infrastructure fee of 8% will be applied

GTS Updates and Enhancements

- Three new features in GT
  - Return to initiator available to OSR/RMG officers
  - Ability for OSR/RMG officers to attach documents in GT at any point
  - New questionnaire will be included
GTS Updates and Enhancements

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Questions