### Attachment A – Checklist for Determining Whether Funding is a Gift or Support for a Sponsored Project

**Funding Source:**

1. **Is the funding provided by the U.S. Government, at the federal, state or local level?**

   - Comments:  
   - **If YES, this is a SPONSORED PROJECT.**

2. **Is the funding provided by an individual (not an organization)?**

   - Comments:  
   - **If YES, this is a GIFT.**

**If neither of the above are true, consider the questions below:**

3. **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)?**

   - Comments:  
   - **UNCERTAIN**

4. **Is there a detailed line item budget for work (e.g., commitment of percentage of effort)?**

   - Comments:  
   - **UNCERTAIN**

5. **Does the funding agreement require return of any unexpended funds at the end of a designated period (i.e., “Start” and “Stop” dates)?**

   - Comments:  
   - **UNCERTAIN**

6. **Does the funding agreement require detailed financial reporting beyond a summary report of expenditures (i.e. line item detail, percentages of effort)?**

   - Comments:  
   - **UNCERTAIN**

7. **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)?**

   - Comments:  
   - **UNCERTAIN**

8. **Does the funding agreement include terms and conditions for the disposition of intangible property (i.e. intellectual property, rights in data, copyrights)?**

   - Comments:  
   - **UNCERTAIN**

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”, this indicates that the funding is for a sponsored project. Keep the completed checklist in your departmental project file, and complete a PDRF.

- **Gift:** If you answer “Yes” to Question 2, or if most of the responses from questions 3 – 8 are “No”, this indicates that the funding is a gift. Keep the completed checklist in your departmental project file, and complete a Gift Transmittal Form.

- **Uncertain:** If you cannot determine with certainty, review with your school dean’s office and then with: Research Management Group (RMG) if you are in the School of Medicine; Engineering Research Administration (ERA) if you are in the School of Engineering; or the Office of Sponsored Research (OSR) if you are in any other unit. These offices may also confer with the Dean of Research office for final resolution. If the funding is determined to be a gift, attach a signed copy of this checklist indicating the final determination to the Gift Transmittal form, along with a Conditions of Gift letter (template is available at http://rph.stanford.edu/docs/gift.doc).

**Initial Department Determination Made by:** ____________________________ Date: __________

**If consultation is needed, School Dean’s office (local process):** ____________________________ Date: __________

**Sponsored Research (RMG, ERA, OSR or Dean of Research office):** ____________________________ Date: __________

**Final Determination:** Gift [ ] Sponsored Project [ ]