

Office of Research and Outreach - Penn State Harrisburg
Gift vs Sponsored Project
Determination Checklist
(Reference – Penn State Policy RA 04)

PI/PD:	Date
School:	Funding \$
Sponsor/Donor:	
Title:	

The purpose of this checklist is to help personnel assess whether funding should be considered sponsored project funding to be processed and administered by the Office of Research and Outreach (ORO) or a gift to be processed and administered by the Office of Development.

Prior to using the checklist, ensure that the following items have been reviewed in their entirety so that the questions can be answered accurately and to the best of one’s knowledge:

- 1.) Request for proposal, solicitation, or sponsor website.
- 2.) Proposal or letter of intent
- 3.) Statement of work or project description
- 4.) Budget and justification
- 6.) Any other correspondence or relevant information.

Please answer all questions in the checklist below.

- | | YES | NO |
|--|--------------------------|--------------------------|
| 1. Is a specific research plan or scope of work required? | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. Is the sponsor expecting deliverables other than an acknowledgement and stewardship report? | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. Will there be a formal agreement or contractual terms and conditions to negotiate? | <input type="checkbox"/> | <input type="checkbox"/> |
| 4. Does the solicitation indicate that invoicing and/or financial reporting will be required? | <input type="checkbox"/> | <input type="checkbox"/> |
| 5. Will approval need to be given by the sponsor to change the Scope of Work or budget? | <input type="checkbox"/> | <input type="checkbox"/> |

Check one box below, and process accordingly.

Sponsored Project:

If you answered “Yes” to any of the questions above, this indicates that the funding is a sponsored project and should be processed by the Office of Research and Outreach.

Gift:

If you answered “No” to all of the questions above, this indicates that the funding is a gift and should be processed by the Office of Development.