



UA- 3.1 Philanthropic Gifts Through Office of Sponsored Programs

Purpose and Process

September 22, 2020

Purpose:

The Office of Research and Engagement (ORE) engages with faculty to create meaningful proposals to fund research projects and programs. The majority of the awards/gifts that are secured by this office are not considered philanthropic due to certain criteria as outlined by the IRS.

However, under certain circumstances, ORE does receive funding that can be categorized as philanthropic and thus partners with University Advancement to be sure these funders receive proper recognition and credit for their gifts.

University Advancement estimates the number of awards that ORE supports that are considered philanthropic gifts and adds this number into our overall fundraising goals. This goal is tracked on our monthly reports we share with the Trustees, other boards and campus partners. On average, the Office of Research and Engagement supports over \$40 million in external awards and contracts annually with FY20 totals at \$42.4 million. Of that \$40 million, approximately \$2 million is considered philanthropic.

Criteria:

The following criteria is used to determine if a gift can be considered philanthropic:

- The funder(s) is not a government agency
- The funds are not passed through another organization from a government agency
- The funder(s) is not receiving any intellectual property or other benefits from the University

Process:

- Once a month, Terri Shelton, Vice Chancellor for Research and Engagement, and Rob Saunders, Assistant Vice Chancellor of University Advancement Operations review all awards/gifts secured by (ORE) to determine if any meet the above criteria for a philanthropic gift
- If a gift is deemed philanthropic, Rob will book this gift on the University Advancement database and begin the process of proper recognition and thank-yous needed to the funder.
- This gift is officially added to the donor's record and can be used for future stewardship opportunities
- This gift will then be reported in our monthly fundraising numbers