

## BYU-College of Life Sciences Donor-Sponsored Gift vs. Research Creative Activity Questionnaire

Occasionally, faculty scholarly activities attract the interest of companies or individuals who are inclined to provide financial support for research. The below questions are designed to help faculty and administrators identify whether the funds are to be coordinated with LDS Philanthropies or with the Office of Research and Creative Activities (ORCA).

1. Is the sponsor or donor a contracted federal/state/local government agency?
  - YES....Contact ORCA, complete needed application, and negotiate overhead.
  - NO....Proceed to question #2.
  
2. Is the donation coming from a company where the professor serves as a line officer (in title or in fact) and has responsibility for making financial decisions in behalf of the company?
  - NO....Proceed to question #3.
  - YES....
    - Has the professor reviewed the university financial conflict of interest policy, instructions, and the disclosure form (see [orca.byu.edu/research/forms](http://orca.byu.edu/research/forms)) and adopted a workable written plan approved by the Department Chair and Dean?
      - YES....Proceed to next question.
      - NO....Work with supervisor to fill out the needed disclosure documents.

Is the professor utilizing university resources (lab, supplies, students, computer, equipment, etc.) to operate this company or to collect data that has potential of benefiting this company?

  - YES....Ensure that this usage is documented in the university financial conflict of interest disclosure form and is included in the workable written plan approved by the Department Chair and Dean.
  - NO....Proceed to question #3.
  
3. Is the sponsor or donor interested in the possibility of obtaining "Intellectual Property" or a patentable product in the future?
  - YES....Contact ORCA, complete needed application, and negotiate overhead.
  - NO....Proceed to question #4.
  
4. Does the gift carry an expectation or promise of deliverables, written or verbal, implied or explicit or other expected benefit from the university? Deliverables can also refer to requiring donor input during performance/research, required publication of results or detailed financial reports.
  - YES....Contact ORCA, complete needed application, and negotiate overhead.
  - NO....Contact LDS Philanthropies representative and department financial assistant to make arrangements for depositing donation into the following college or department direct student aid gift account:
    - Account (operating unit) name: Exercise Sciences Direct Student Aid
    - Account (operating unit) number (8 digits): 23333129

**Donor Information:**

Name: \_\_\_\_\_ City/State/Zip: \_\_\_\_\_  
 Company: \_\_\_\_\_ Telephone Number(s): \_\_\_\_\_  
 Address: \_\_\_\_\_ Donation Amount: \_\_\_\_\_

The donor gift funds become the property of the university and not the faculty member. Receipt of donor funds must be coordinated with LDS Philanthropies, and will be deposited into a gift account under the control and management of the college or department and used exclusively for university purposes. If the department chair approves the donation to be used for a professor's research, then spending is to happen directly out of the above listed direct student aid gift account.

By signing below we acknowledge we have read and understand the above information and are in compliance with university procedures related to accepting research related gifts from donors.

Signature of Professor	Date:
Signature of Dept. Chair	Date:

If it is determined that the gift needs to be receipted and deposited through LDS Philanthropies, then forward this signed form with the donor check or wiring information to LDS Philanthropies at 1450 N. University Avenue, 308E | Provo, Utah 84604. Retain a copy for your department records.