

When is It a gift, a grant, or a sponsored project – and how do I route it in each case?

1. Is the award irrevocable (i.e., does the funder reserve the right to ask that the money be returned if certain terms and conditions aren't met or to return any unused portion of the funds) and does it come with 'no strings attached' (i.e., no deliverables, reports [aside from normal stewardship reports], or the like)?
 - a. If it is irrevocable and has no strings attached, it would be considered a gift (and would need to be routed through UMAF).
 - Contact UMAF Foundation Relations (when dealing with a private foundation) or UMAF Gift & Donor Services (when dealing with an individual or corporate donor).
 - b. If it is revocable and a 501(c)(3) pass-through is required by the funder, it would be considered a grant (and would need to be routed through the central UMass Foundation in Boston).
 - Contact UMAF Foundation Relations to coordinate with UMF and OPAS
 - Route your proposal through OPAS for review/approval. Once OPAS approval has been obtained, UMF will conduct its separate review/approval process, after which OPAS will submit your proposal to the funder.
 - c. If it is revocable and a 501(c)(3) pass-through is NOT required by the funder, it would be considered a grant (and would be routed directly through the university).
 - Contact UMAF Foundation Relations (when dealing with a private foundation) and OPAS (for review, approval, and submission in all cases) or OPAM (for post-award assistance in all cases)
2. Is the funder going to receive something in exchange for its donation (like brand visibility, marketing, and/or recognition)?
 - a. If the answer is yes, this would be a sponsorship (and would be routed directly through the university).
 - Contact the UMass Office of Corporate Engagement and OPAM