

What is a Gift Agreement?

A gift agreement is a formal contract between The Ohio University Foundation (the Foundation) and a donor. It defines when and how a gift will be made, as well as how it will be used. A gift agreement may also be referred to as account guidelines, a Memorandum of Agreement (MOA), or a Memorandum of Commitment (MOC). Typically, the Foundation executes an MOA to describe how a gift will be used, and an MOC to define the gift amount and the date(s) by which the donor will make payment.

Gift agreements are legally binding. The University and Foundation must use gifts in accordance with the terms defined in these agreements. To facilitate compliance with gift agreements, the Foundation Accounting office makes these documents available to all faculty and staff via an OBI Dashboard.

Accessing Gift Agreements

1. To access gift agreements, log into the Faculty and Staff OBI Dashboards by clicking on the OBI button available at <https://www.ohio.edu/finance>.



2. Choose the Finance option from the Dashboards dropdown menu.



3. From the Segment Lookup screen on the Lookups tab, go to the Segment Selector, click the Source radio button, then click Apply. This will reveal a Prompts box and a list of Sources.

Finance

Home Catalog Favorites Dashboards

Lookups General Ledger Grants Purchasing Equipment Inventory

Segment Lookup Cost Center Lookup Employee Lookup FARM Approvers Conversion Lookup

Segment Selector

Select Segment Entity Source Organization Activity Function Object Project/Task Expenditure Type **Apply** **Reset**

Prompts

Source Between [] - [] Source Desc contains any [] Show End-Dated? No Foundation ID --Select Value-- **Apply** **Reset**

Source

SRC LVL A #/Desc	SRC LVL B #/Desc	SRC LVL C #/Desc	SRC LVL D #/Desc	SRC LVL E #/Desc	SRC LVL F #/Desc	SRC LVL G #/Desc	Source	SRC Desc
A00000 OHIO UNIVERSITY - TOTAL	B10000 UNRESTRICTED	C10000 UNRESTRICTED	D10000 UNR OPS	E10000 UNRESTRICTED	F10000 UNRESTRICTED	G10000 UNRESTRICTED	100000	UNRESTRICTED



Accessing Gift Agreements

- The Foundation Accounting office assigns a unique Source number to each gift account. Use the prompts to locate a Source. If you know the Source number, enter the last four digits of the Source into the Foundation ID box. If you know part of the account name (the donor last name, for example), enter a keyword into the Source Desc Contains Any box. If you want to view a single Source or range of Sources, enter those numbers in the Source Between boxes. Click the Apply button.

Prompts

Source Between - Source Desc contains any Show End-Dated? No Foundation ID Select Value--

- When the correct Source is visible on the list below the prompts, click the blue hyperlink in the Source column. This will open a new window and reveal the gift agreement. If a Foundation ID shows multiple results, all hyperlinks will return the same document.

Prompts

Source Between - Source Desc contains any Show End-Dated? No Foundation ID 8006

Source

SRC LVL A #/Desc	SRC LVL B #/Desc	SRC LVL C #/Desc	SRC LVL D #/Desc	SRC LVL E #/Desc	SRC LVL F #/Desc	SRC LVL G #/Desc	Source	SRC Desc
A00000 OHIO UNIVERSITY - TOTAL	B10000 UNRESTRICTED	C10000 UNRESTRICTED	D10000 UNR OPS	E13000 ENDOWMENT DISTRIBUTIONS (UNR)	F13000 ENDOWMENT DISTRIBUTIONS (UNR)	G13000 UNRESTRICTED	138006	USMP THE RUSS COLLEGE OF ENGINEERING AND TECHNOLOGY GENERAL SCHOLARSHIP ENDOWMENT
A00000 OHIO UNIVERSITY - TOTAL	B10000 UNRESTRICTED	C20000 UNRESTRICTED	D20000 UNR NON-OPERATING	E26000 QUASI ENDOWMENT-CORPUS (UNR)	F26500 SCHOLARSHIPS, FELLOWSHIPS, AWARDS (UNR QC)	G26500 SCHOLARSHIPS, FELLOWSHIPS, AWARDS	268006	CEC USMP THE RUSS COLLEGE OF ENGINEERING AND TECHNOLOGY GENERAL SCHOLARSHIP ENDOWMENT
A00000 OHIO UNIVERSITY - TOTAL	B10000 UNRESTRICTED	C20000 UNRESTRICTED	D20000 UNR NON-OPERATING	E27000 QUASI ENDOWMENT-NET APPRECIATION (UNR)	F27500 SCHOLARSHIPS, FELLOWSHIPS, AWARDS (UNR QNA)	G27500 SCHOLARSHIPS, FELLOWSHIPS, AWARDS	278006	QA USMP THE RUSS COLLEGE OF ENGINEERING AND TECHNOLOGY GENERAL SCHOLARSHIP ENDOWMENT
A00000 OHIO UNIVERSITY - TOTAL	B40000 TEMPORARILY RESTRICTED	C40000 RESTRICTED - EXPENDABLE	D40000 RESTRICTED OPERATING	E43000 OUF ENDOWMENT DISTRIBUTIONS (TR)	F43500 SCHOLARSHIPS, FELLOWSHIPS, AWARDS (DISTRIBUTION)	G43500 SCHOLARSHIPS, FELLOWSHIPS, AWARDS	438006	FSP USMP THE RUSS COLLEGE OF ENGINEERING AND TECHNOLOGY GENERAL SCHOLARSHIP ENDOWMENT
A00000 OHIO UNIVERSITY - TOTAL	B40000 TEMPORARILY RESTRICTED	C40000 RESTRICTED - EXPENDABLE	D50000 TR NON-OPERATING	E58000 ENDOWMENT-NET APPRECIATION	F58500 SCHOLARSHIPS, FELLOWSHIPS, AWARDS (TR NAPPR)	G58500 SCHOLARSHIPS, FELLOWSHIPS, AWARDS	588006	TEA USMP THE RUSS COLLEGE OF ENGINEERING AND TECHNOLOGY GENERAL SCHOLARSHIP ENDOWMENT
A00000 OHIO UNIVERSITY - TOTAL	B70000 PERMANENTLY RESTRICTED	C70000 RESTRICTED - NONEXPENDABLE	D70000 PR NON-OPERATING	E76000 GIFTS CORPUS	F76500 SCHOLARSHIPS, FELLOWSHIPS, AWARDS	G76500 SCHOLARSHIPS, FELLOWSHIPS, AWARDS	768006	TEC USMP THE RUSS COLLEGE OF ENGINEERING AND TECHNOLOGY GENERAL SCHOLARSHIP ENDOWMENT

Refresh -Print -Export

- When the gift agreement is revealed in a new OnBase window, more than one document may be available. If so, select a document to view by double clicking on the document name.

Browser address bar: <https://onbase.ohio.edu/OnBase/docpop/docpop.aspx>

OnBase

Document Search Results

DOCUMENT NAME

Contains

- [FE9190397 - THE RUSS COLLEGE OF ENGINEERING AND TECHNOLOG -- OUF - Guidelines](#)
- [QE9190397 - THE RUSS COLLEGE OF ENGINEERING AND TECHNOLOG -- OUF - Guidelines](#)

Items: 2

Please Select an Item



This will make the document visible below the document list.

The screenshot shows the OnBase interface with a document viewer. The document is titled "Memorandum of Agreement" and is from "THE OHIO UNIVERSITY FOUNDATION". It includes a "RECEIVED" stamp dated "DEC 20 2013". The text of the agreement states: "Agreement: This agreement, entered into between Various Donors ("Donor") and The Ohio University Foundation ("Foundation"), establishes an account ("the Endowment") to be held, managed, and used by the Foundation for the benefit of Ohio University ("University"). It shall be named:". The document is viewed in a browser window with the URL https://onbase.ohio.edu/OnBase/docpop/docpop.aspx.

Important Tip:

Gift agreements are intended to be permanent documents that are not edited or replaced. In rare instances, however, the Foundation may revise a gift agreement. When that occurs, the Foundation Accounting office will make the revised gift agreement visible in the OBI Dashboards and will remove the old document.

Don't save or store gift agreements on a hard drive or other location for future reference. Always access gift agreements through the OBI Dashboards to ensure that you are using the current document.

What to do if the OnBase window shows "No items to display":

- Check the source name on the Segment Lookup screen. The gift account might not have a gift agreement. Accounts with no gift agreement cannot be spent, and they are labeled with "NG" (which stands for "No Guidelines") before the account name. Contact your planning unit's development officer to determine why a gift agreement has not been finalized.
- If the OnBase window shows "No items to display" and the account name is not labeled with "NG", email the Source number and SRC Desc to treasury@ohio.edu and ask that Foundation Accounting staff make the gift agreement visible in the OBI Dashboards.

The screenshot shows the OnBase search results page with "No items to display" circled in red. Below the search results is a table with the following data:

Source	SRC Desc
766590	TEC NG THE OSTEOPATHIC HERITAGE FOUNDATION PRIMARY CARE ENDOWED SCHOLARSHIP