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.
4. 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.

5. 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.

6. 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.
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.