



FOREIGN SOURCES AND GIFTS REPORTING PROCESS

For any:

- Gifts received or contracts entered into with a foreign entity or government;

OR

- any ownership in or control over Berklee by a foreign entity

AND

- The gift/contract is worth over \$250,000;

OR

- The sum of all gifts from the individual, entity, or foreign government is over \$250,000 for the year

THEN

Report the following to the Office of Student Financial Services:

1. The date of the gift/contract;
2. The aggregate dollar amount of all gifts/contracts attributable* to each particular country or foreign government; and
3. The country to which each gift is attributable.

For any restricted or conditional** gift/contract, also provide the specific amount of the gift/contract and a description of the conditions or restrictions.

The Finance Department will be informed of all filings in process and completed. Institutional Advancement will be advised when gift filings are complete.

* The country to which a gift is attributable is the country of citizenship of an individual or of incorporation of a legal entity. If either is unknown, use the principal place of residence for an individual or the principal place of business for an entity.

** A restricted or conditional gift or contract is one that includes provisions regarding: (1) the employment, assignment, or termination of faculty; (2) the establishment of departments, centers, research or lecture programs, or new faculty positions; (3) the selection or admission of students; or (4) the award of grants, loans, scholarships, fellowships, or other forms of financial aid restricted to students of a specified country, religion, sex, ethnic origin, or political opinion.