**BUSINESS PLAN FOR REVENUE GENERATING ACTIVITY**

**Name of Revenue Generating Activity:**

**Department/Center of Revenue Generating Activity:**

**Location of Revenue Generating Activity:**

**Business Operations of Revenue Generating Activity:**

This business plan is to establish and operate a revenue generating activity (“RGA”) at the University of North Carolina at Charlotte (“UNC Charlotte” or “University”) under the [Standards for Non-Recharge Unit Revenues](https://finance.charlotte.edu/resources/standard-for-non-recharge-unit-revenues/) and [University Policy 602.12, Revenue Generating Activities](https://legal.charlotte.edu/policies/up-602.12).

1. Background and Purpose of the RGA
	1. The purpose of this RGA is to provide services to \_\_\_\_\_\_\_\_\_\_\_\_\_\_.
	2. The RGA is organized structurally within \_\_\_\_\_\_\_\_\_\_\_\_\_.
2. Services of the RGA
	1. The mission of UNC Charlotte, as North Carolina’s urban research institution, is to transform lives, communities, and industries through scholarship, creative work, innovation, and service. The RGA will serve UNC Charlotte’s mission by:
		1. Describe the services, expertise, capabilities, functions, and support that will be provided by the RGA to support UNC Charlotte or the Charlotte area.
		2. State who will benefit from the support/services provided by the RGA (e.g., students, faculty, campus partners, industry partners).
3. Competition
	1. State whether the services provided by the RGA are available from other places on campus or locally.
4. RGA Personnel
	1. RGA Director
		1. Provide the name, title, and contact information for the person who will oversee the RGA.
	2. RGA Managers
		1. Provide the name, title, and contact information for the people who will manage the RGA’s daily operations.
		2. Provide a summary of how they will manage the RGA’s daily operations.
	3. RGA Business Officers
		1. Provide the name, title, and contact information for the people who will manage the financial and business aspects of the RGA, including business evaluation, budget management, accounting services, and expense approval.
		2. The Business Officers will be responsible for:
			1. Providing services to facilitate the business functions that support the University’s internal and external clients.
			2. Assisting with documentation, execution of contracts, invoices, and providing accounts receivable services.
			3. Monitoring financial and budgetary accounting systems; facilitating account expenditures; managing reporting and reconciliation.
5. RGA Technical and Business Operations
	1. Provide an overview of the RGA’s technical operations, including any compliance requirements (e.g., implementation of a safety plan, steps to avoid conflicts of interest, safety and security protocol).
	2. Initial Projected Budget:

|  |  |  |
| --- | --- | --- |
| Revenues  | Expenses  | Net Profit  |
|  |  |  |
|  |  |  |
|  |  |  |

* 1. Rates: RGA rates will be based on the current rates of the personnel, equipment, usage, depreciation, maintenance, and supplies for the RGA to function. Please provide a brief rationale for the rates provided. The goal of the RGA should be to operate close to break-even.
1. RGA Building

|  |  |  |
| --- | --- | --- |
| Name of Facility  | Room Number  | On Millennial Campus, Y/N?  |
|  |  |  |
|  |  |  |
|  |  |  |

1. RGA Equipment
	1. Will any F&A of the university be used in support of this activity?
	2. Provide any additional information relevant to the proposed RGA.

|  |  |  |
| --- | --- | --- |
| Asset Number  | Acquisition Date and Cost  | Description of Equipment  |
|  |  |  |
|  |  |  |
|  |  |  |

**BUSINESS PLAN REVIEW Initials Date**

Associate Vice Chancellor for Finance \_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_

Office of Legal Affairs \_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_

Enterprise Risk Management \_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_

**APPROVALS Initials Date**

RGA Director \_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_

RGA Manager \_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_

RGA Business Officer \_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_

**COMPLIANCE ATTESTATION**

As the Director of this Revenue Generating Activity, I attest that the information contained in this business plan is complete and accurate, to the best of my knowledge. I agree to adhere to the terms of this business plan. If there are any material changes to this business plan, I will inform Business Affairs as soon as reasonably possible.

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