

Business Plan

“Insert UPCI Shared Resource Name”

1 – Function and purpose:

Consider this your mission statement – what you propose to do and why you will do it. Provide any pertinent background facts regarding the scientific need for the services that the shared resource provides.

If this is a new shared resource that is being proposed, detail the specifics of why this center is being created; i.e., needs of investigators for this service (not readily available elsewhere), new scientific advances that necessitated this new service or equipment, etc. If you are proposing a service that is already available within the University system, explain the other services that exist, why your service is unique, and how it will/or won't impact the users of the existing service.

2 – Resource Summary

2.1 List of Services: Briefly name and describe each service to be provided within your shared resource (Service 1, 2, 3... to match column designations within Cost Model spreadsheet template). If two services are similar, include a brief description of the key differences (for example, slides are prepared one of two ways, one with contrast dye, one without).

2.2 Personnel: Provide the key individuals necessary to successfully oversee the administration of the shared resource and completion of all tasks proposed. For each category listed below provide an individual's name, percent of effort devoted to all activities within the center, and a brief description of their role. Information should be provided for each of the following categories.

- Faculty Director-responsible for oversight and technical expertise
- Manager- responsible for day-to-day operations
- Administrator or financial support individual (applicable) responsible for the maintenance of the account records and billing users for services
- Technicians or other support personnel

2.3 Customer Base: Identify your potential customer base within the categories provided below.

2.3.1 Internal Users: For this group of users identify internal affiliation

- UPCI investigators. Include an estimate of the number of annual users, their funding status, the methodology used to estimate the base, and the service units expected to be charged to these individuals.
 - Keep track of the scientific accomplishments that the shared resource contributes to including: grants, clinical trials, and publications.
 - Encourage all users to acknowledge your shared resource using the following citation: ***This project used the UPCI [insert name(s) of shared resource(s)] that [is/are] supported in part by award P30CA047904***
- University of Pittsburgh (non-UPCI investigators). Include an estimate of the number of annual users, their funding status, the methodology used to estimate the base, and the service units expected to be charged to these individuals.

2.3.2 External Users: Note that the percentage of external usage is capped at 5% by the University to avoid issues with the University's building bond rating and the payment of unrelated business income tax.

- This section should include a) the overall volume of services to be provided to outside entities, as a percentage of the center's cost recovery/anticipated revenue and b) a list of external entities that may use your service(s). Provide specific names of these entities grouped in the following categories: academic institutions/not-for-profit foundations and for-profit companies and corporations.

2.4 Location and Facilities: Provide the exact location of the shared resource; Building name, floor, room number or suite number. If the shared resource does not occupy an entire room and is only taking up a portion of this space provide the actual number of square feet used.

3 – Financial Summary

This section of the Business Plan relates to non-compensation categories identified within your cost model. Of these categories information is requested for the following.

3.1 Space Rental: Your shared resource budget will include a charge for the space used for shared resource activities. Because UPCI shared resources are currently set up as 02 accounts, this cost cannot be passed onto the customers, however, the indirect costs associated with the grants that are assigned to the resource are used to cover this cost.

3.2 Depreciation: Depreciation for this purpose related directly to equipment used to provide this Center's services. A schedule is included as part of the Budget Plan that requests you provide the following information for each piece of equipment: source of funding for each piece of equipment, useful life and years into the useful life.

Note that if the funding source was federal funds, depreciation cannot be factored into the cost model for internal users, but can be charged for external users.

3.3 Subsidy: A subsidy is the amount of funding UPCI will provide to offset the cost of the services provided. A subsidy, if available, may also be applied to all users or to only a specific group of users.

Will this shared resource need to be subsidized? The expectation is that a UPCI shared resource will be run at a breakeven point – expenditures should equal revenues (cost recovery). There are some instances where a subsidy in the initial rollout of the shared resource is necessary to provide support for the operation.

If a subsidy is needed, provide the source of funding for the subsidy.

3.4 Charge rate per unit: Provide a brief description of the "units for service" includes within your Cost Model. An example would be cost per protocol, person, hour, etc.