



For enquiries about this form contact:

This form is available at <http://www.fin.unsw.edu.au>

Client Services  
Attn: Laurie Zancanaro  
1<sup>st</sup> Floor,  
The Chancellery  
Telephone: (02) 9385 8150

Please write all answers in CAPITAL LETTERS

### What is this form for?

To open a project for the receipting of external and internal funds that relates to Commercial Activities and Other Income Generating Activities (GI), Accumulated Funds, Suspense, Beneficial and Endowment Funds and they **do not** attract RTS/IGS funds. For **Research Grants** you will need to complete the form **RA1** and submit to the Research Office. For **scholarships** you will need to complete a scholarship proposal kit and submit to the Scholarships Office.

The following criteria is **mandatory**:

- Complete the detailed budget indicating revenue, expenses and surplus.
- Must nominate a Fund Department Project (FDP) to transfer balances that may exist. I further agree in the absence of any instruction relating to this project that any staff still appointed or outstanding purchase orders will similarly have these costs transferred to this nominated FDP. Should the nominated FDP have insufficient funds or be closed the deficit will be transferred to the department's accumulated fund or FDP general fund.
- This form must be authorised by the Head of School or Dean of the unit receiving these funds.

### Where is this form to be sent?

Your Faculty/Division Client Services Accountant

### Part one: Project details

1. Title of Project:

2. Specify Purpose of Activity/Project:

3. Proposed Fund type of the Project:

(Refer Section 10 of the Accounting Manual at [www.fin.unsw.edu.au](http://www.fin.unsw.edu.au) for Fund Definitions)

4. Proposed Department ID of the Project:

5. Do conditions apply to the project? If yes, please attach conditions.  Yes  No  
Interest Bearing  Yes  No

6. Do you consider there are any matters which require clarification or inspection by the University's legal officer? If yes, please attach documentation:  Yes  No

7. Does the project relate to a University Commercial Activity?  Yes  No  
Refer to University Guidelines for Commercial Activities at [www.legal.unsw.edu.au](http://www.legal.unsw.edu.au)  
If yes, please provide the Commercial Activities Registration (CAR) number from the Compliance Unit. CAR No.  
If no, please attach confirmation details from the Compliance Unit.

8. Are financial statements required to be provided to a person or entity outside of UNSW? If yes, please attach requirements.  Yes  No

9. How long will the project operate? Please specify a termination date. Date / /

*NB: At 31 December or on agreed end date for the business cycle of activities, balances remaining in GI activities will be transferred to the nominated FDP shown on Page 2.*

### Part Two: Project Manager:

Name: \_\_\_\_\_ Empl ID: \_\_\_\_\_ Telephone: \_\_\_\_\_  
Position: \_\_\_\_\_ Facsimile: \_\_\_\_\_  
Faculty/School/Department/Unit: \_\_\_\_\_ Email: \_\_\_\_\_  
Signature: \_\_\_\_\_ Date: / /

### Part Three: Budget details

#### Complete budget details.

For GI Activities refer to Policy on Commercial Activities and Other Income Generating Activities at [www.fin.unsw.edu.au](http://www.fin.unsw.edu.au).

#### Revenue

|   | GST Exclusive | GST Inclusive |
|---|---------------|---------------|
| 1. Number of participants to ensure viability _____ |               |               |
| Enrolment fees per participant                      | \$ _____      | \$ _____      |
| Income from enrolment fees                          | \$ _____      | \$ _____      |
| 2. Other Income                                     | \$ _____      | \$ _____      |
| 3. TOTAL INCOME                                     | \$ _____      | \$ _____      |

(For GI Activities an Overhead Charge of 15% of external revenue must be factored into the pricing to cover University indirect and overhead costs)

#### Expenses

|  |          |          |
|--|----------|----------|
| 4. UNSW Salaries including on-costs                    | \$ _____ | \$ _____ |
| 5. Fees – External lecturers/consultants               | \$ _____ | \$ _____ |
| 6. Accommodation                                       | \$ _____ | \$ _____ |
| 7. Travel  | \$ _____ | \$ _____ |
| 8. Hire of lecture theatre/equipment                   | \$ _____ | \$ _____ |
| 9. Catering  | \$ _____ | \$ _____ |
| 10. Advertising and promotion                          | \$ _____ | \$ _____ |
| 11. Course materials, postage and copying              | \$ _____ | \$ _____ |
| 12. Other costs  | \$ _____ | \$ _____ |
| _____  | \$ _____ | \$ _____ |
| _____  | \$ _____ | \$ _____ |
| 13. Transfer of Overhead Charge (15% of Income Ex GST) | \$ _____ | \$ _____ |
| 14. TOTAL EXPENDITURE                                  | \$ _____ | \$ _____ |
| 15. ESTIMATED EXPECTED SURPLUS                         | \$ _____ | \$ _____ |

**FDP to be charged if project has terminated, cancelled or a deficit/surplus balance exists at 31 December each year.**

| Business Unit | Fund | Dept. Id | Program | Class | Project/Grant |
|---------------|------|----------|---------|-------|---------------|
| UNSWA         |      |          | 0000    |       |               |

### Part Four: Declaration and Authority

I have complied with the relevant UNSW Policies and Guidelines and I accept the criteria stated and authorise the creation of the project.

Signature: \_\_\_\_\_

Date:     /     /

Head of School/ Division, Executive officer or Dean:

*(Please print name and title)*

### CLIENT SERVICES USE ONLY

Complete a PROJECT Chartfield Modification Form (Located on Finance website - <http://www.fin.unsw.edu.au>)