

**Colorado State University
Unrelated Business Income Questionnaire**

Name: _____ Dept. # _____
(College, Department or Operating Unit)

Account Name: _____ Acct # _____

Questionnaire Completed by: _____
(Individual)

Phone: _____ Email: _____

GENERAL

Fully describe the activity or activities performed. Please include a description of the goods or services and the reason(s) for offering these goods or services for sale.

Is the activity generating revenue from the sale of goods or the performance of services?

Yes _____ No _____

Approximately how much revenue was generated by the activity during the previous fiscal year? \$ _____

Who are the purchasers of the goods or services? Please be specific.

Is the activity conducted on a "regular" (i.e., year-round, seasonal, etc.) basis?

Yes _____ No _____

Is the activity conducted on an infrequent, casual or sporadic basis?

Yes _____ No _____

Does the activity have a "substantial" causal relationship to the accomplishment of the University's exempt purposes? (i.e., does it contribute importantly to the accomplishments of education, research and/or community outreach)?

Yes _____ No _____

If yes, explain how the activity enhances, furthers, or in any way relates to the exempt purposes of the University:

Are students participating in the activity as part of a learning experience?

Yes _____ No _____

If yes, does this experience earn the students credit toward a degree?

Yes _____ No _____

Does faculty or staff participation assist in the overall accomplishment of the exempt purposes of the University?

Yes _____ No _____

If yes, explain how:

Is the activity performed for the convenience of University students, faculty or staff? Ex: textbook sales onsite to students

Yes ____ No ____

Indicate the percentage of total revenues attributable to each group of users.

“Users” refers to customers of the activity, not those conducting the activity:

<u>Users</u>	<u>Percentage</u>
University students	_____
University faculty/staff employees	_____
University alumni	_____
General public	_____
Other (specify) _____	_____
	<u>100%</u>

Does the activity involve the performance of an essential governmental service?

Yes _____ No _____

If yes, please explain:

SERVICES

Does your college, department, operating unit or “22” Account receive revenue from the sale of any of the following services to persons or entities outside the University (please check):

- _____ Copying, printing, binding, or graphic design
- _____ Audio or video production, repair, duplication
- _____ Photography or cartography services
- _____ Accounting, billing, collection, communication, record-keeping
- _____ Personnel services (e.g., recruitment, testing or training)
- _____ Other services (describe:)

Does your college, department, operating unit or "22" Account receive revenue from consulting services to persons or entities outside the University?

Yes _____ No _____

Does your college, department, operating unit or "22" Account receive revenue from the sale of any of the following to persons or entities outside the University (please check):

- _____ Internally developed software
- _____ Computer time to persons or entities outside the University
- _____ Other types of computer services (e.g., information retrieval, messaging services, etc.)
- _____ Computer software courses

Does your college, department, operating unit or "22" Account offer or sponsor travel tours? Ex:

Yes _____ No _____

If yes, please provide information regarding the nature of the travel tours:

Does your college, department, operating unit or "22" Account sell or rent mailing lists to taxable entities or tax-exempt entities that are not charitable?

Yes _____ No _____

PRODUCTS

Does your college, department, operating unit or "22" Account sell any products, merchandise, or supplies to persons or entities outside of the University?

Yes _____ No _____

If yes, please explain what is sold, to whom it is sold, and the manner of payment for goods sold:

Does your college, department, operating unit or "22" Account manufacture any equipment or products?

Yes _____ No _____

If yes, please explain your manufacturing or product development activities:

Does your college, department, operating unit or "22" Account conduct mail-order sales?

Yes _____ No _____

Does your college, department, operating unit or "22" Account conduct Internet sales?

Yes _____ No _____

Does your college, department, operating unit or "22" Account receive revenue from the sale of biological products or agricultural by-products?

Yes _____ No _____

Does your college, department, operating unit or "22" Account receive revenue from special laboratory testing?

Yes _____ No _____

Does the activity involve the sale of donated goods?

Yes _____ No _____

RENTAL ARRANGEMENTS

Does your college, department, operating unit or "22" Account receive rental payments attributable to any of the following arrangements:

- _____ Rental of real property only (land or building)
- _____ Rental of personal property only (equipment, etc.)
- _____ Rental of vehicles (buses, vans, etc.)
- _____ Combination of real property and personal property

If a combination of real/personal property rental arrangement exists, indicate the percentage of rental payment attributable to the following:

_____ % Real property _____ % Personal property

Describe the property rented:

To whom is the property rented:

If you provide any services to the lessee as part of the rental arrangement, please describe the services in detail:

Does your college, department, operating unit or "22" Account lease or rent any other facilities not identified above to the general public?

Yes _____ No _____

If yes, please describe:

RESEARCH ACTIVITIES

Does your college, department, operating unit or "22" Account receive any revenue from activities incident to commercial or clinical testing?

Yes _____ No _____

Are any research projects to develop new or improved uses for existing commercial products?

Yes _____ No _____

Are any laboratory services provided to the general public including technical or scientific procedures?

Yes _____ No _____

Does your college, department, operating unit or "22" Account receive any royalties?

Yes _____ No _____

ADVERTISING

Does your college, department, operating unit or "22" Account publish, sell or distribute any of the following (please check):

_____ Athletic or cultural events programs

_____ Phone directories

_____ Magazines and journals

_____ Newsletters

_____ Yearbooks

_____ Other Publications (Describe:)

Do any of these publications contain paid advertising?

Yes _____ No _____ N/A _____

Does your college, department, operating unit or "22" Account receive gifts directly from corporations?

Yes _____ No _____

If yes, please indicate whether your college, department, operating unit or "22" Account provides any of the following benefits for the corporate sponsor in exchange for the gift:

_____ Special promotions of corporation's product or service

_____ Instruction to public to buy a product or service

_____ Endorsement of the corporation's product or service

_____ Inducement of parties to buy, sell, or lease sponsor's product or service

_____ Distribution of product price information

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OVERALL RECOMMENDATION

Report _____ Exempt _____

After reviewing the information provided above, briefly explain the reason(s) why the activity(ies) should be reported or exempted:
