

# Faculty Consulting Procedures

## Written Pre-Approvals

Obtain written pre-approvals required by the [Faculty Consulting Policy](#) by drafting a memo to the Dean, Provost/VP for Academic Affairs, and VP for Administration & Finance, including the following information:

- Date;
- A brief description of the proposed consulting activity;
- Dates of proposed activity;
- Name of sponsor(s) and sponsor(s) nature, i.e., state agency, private company, university, etc.;
- The amount of time expected to be spent on the activity, along with the specific dates and times when the consulting activity is expected to occur;
- A detailed inventory of University facilities and resources needed for the activity (including, but not limited to, supplies and equipment, administrative assistance, student time, long distance telephone and fax charges, photocopies, travel and transportation to be charged through University accounts, etc.), and the estimated cost to the University of such resources;
- Any University of Montana-Missoula and other Montana University System employee(s) and/or student(s) likely to be used in the proposed activity, plus a description of the level of any such persons' involvement;
- Whether the proposed activity is subject to sponsor(s) request for confidentiality regarding the activity or any aspect thereof, and if so, the specific nature of the confidentiality request should be described;
- A description of any intellectual property rights, data, or publications the proposed activity is likely to produce (Note: use of any intellectual property in which the University has an ownership interest in any faculty consulting activity shall require approval from the AVP for Tech. Transfer, Office of Research and Creative Scholarship);
- A description of any actual or potential conflict of interest of which the faculty member is reasonably aware and how such conflict(s) was reported and managed by the University's Conflict of Interest Manager, Office of Administration and Finance, under [Policy 703](#); and
- An affirmative commitment in the Memorandum that the faculty member will reimburse the University in full, pursuant to a specific reimbursement schedule, for all such resources used.

## Process for Denial of Approval

If the dean does not approve such activity, the faculty member may request UFA-Administration Committee review, per procedures detailed in the CBA.

## **Requirement to Report Material Changes**

Once any consulting activity has begun, the consulting faculty member should report any material changes in any of the above information to the faculty member's academic dean in timely fashion, including resolution or termination of the consulting activities. In addition, the faculty member should provide a detailed accounting of all University resources used in the consulting activity once the activity concludes.

## **Reporting Requirements**

### **Beginning of Year In-Progress Reporting**

- By September 1 – Dean reminds faculty of the annual Faculty Consulting Policy in-progress reporting requirements.
- By September 15 – Faculty inform (in writing) the dean of any outstanding contracts in wherein the unit member receives compensation for services, including a statement that such contracts comply with all applicable policies, including the Faculty Consulting and Conflict of Interest policies.

### **End of Year Inventory Reporting**

- By April 15 – Dean requests faculty to submit annual consulting reports.
- By May 15 (or end of academic year) – Faculty inform the dean (in writing) of the number of hours of compensated consultation in which they engaged during the previous academic year, including a statement that such contracts complied with all applicable policies, including the Faculty Consulting and Conflict of Interest policies.
- By August 1 – Deans submit consolidated summary of consulting inventory to the Provost.
- By October 1 – The Provost submits the campus consulting inventory to the President, which shall be passed on the Board of Regents no later December 31.