



Outside Activities Reporting for Calendar Year 2017 Guidelines for Faculty, Academic Staff and Limited Appointees

[Regent Policy Document 20-7](#) *Whereas, the Board of Regents recognizes the importance of accountability to the people of Wisconsin and believes that it is in the interest of both the public and the UW System to assure public confidence in the integrity of UW System faculty and staff, and*
([Regent Resolution 5785](#))
(Adopted 5/10/91)

Whereas, UW System policies regarding public reporting of outside interests and activities required by [UWS 8](#) of the Wisconsin Administrative Code are among the most extensive among universities in the nation, and

Whereas, the Regents wish to support and encourage UW faculty and staff to share their expertise and talents with agriculture, business, industry, and the state's communities,

Therefore, the Board of Regents approves the "UW System Guidelines and Form for Reporting Outside Activities" as required by [UWS 8.025](#), Wisconsin Administrative Code, "and directs the UW System President to implement these revised procedures at all UW institutions effective for the reporting period ending April 30, 1992."

Under [Wis. Admin. Code § UWS 8.025](#)
(Guidelines approved by Board of Regents May 10, 1991 – [Regent Policy Document 20-7](#))

Who must report and what must be reported?

It is the policy of the University of Wisconsin System to require a report from all faculty, academic staff and limited appointees who engage in remunerative outside activities in their field of professional interest whose appointments are half-time or more for the period under contract to the UW System. If you have a joint appointment, you must file a report for each department/unit. Your report covers activities that occur during the full year, even if you were not under contract to the University for part of that time. You should discuss with your dean or director any activities that may present carryover questions of conflict with your responsibilities during your contract period. Additionally, while the form gathers information for the prior year, staff are required to report any changes in your circumstances as they occur as soon as possible.

Note: The President, Chancellor or his/her designee may provide exception to the deadline of completing this form in extenuating circumstances. Notwithstanding the exception, the employee must immediately submit this form upon his/her return to work.

For purposes of the Outside Activities Report form:

A remunerative relationship is any relationship that results in payments, transfer of goods or provision of services to the reporting staff member.

Net remuneration includes the value of all payments, goods and services received as compensation for an activity less expenses. Expenses deducted should not exceed those that could ordinarily be claimed from university administered funds.

An organization is any corporation, partnership, proprietorship, firm, enterprise, franchise, association, trust or the legal entity other than an individual or body politic (see [Wis. Admin. Code § UWS 8.02\(12\)](#)).

Professionally related activities are activities related to the staff members' field of academic interest or specialization.

Ordinary professional activities are those activities which extend an unclassified staff member's normal institutional responsibilities of teaching, research and service to serving other public institutions, organizations, and professional societies. Examples of such ordinary professional activities would be:

- a. Occasional lectures, colloquia, seminars, etc., given at colleges and universities and at meetings of professional societies.
- b. Preparation of monographs, chapters and editorial services for nonprofit educational organizations.
- c. Service on advisory committees and evaluation panels for government funding agencies, nonprofit foundations and educational organizations.
- d. Leadership positions in professional societies.

Please note: The annual economic interests reporting requirement administered by the Office of the Board of Regents is separate from and in addition to the outside activities reporting requirement. Pursuant to [Wis. Admin. Code § UWS 8.06](#), the president, vice presidents, chancellors, and all contracting personnel must file a statement of economic interests with the Office of the Board of Regents annually, by April 30.

Those activities which are reportable under [UWS 8.025](#) include:

1. Professionally related outside activities occurring during the time you are under contract to the university for which you received net remuneration, not including ordinary professional activities.
2. The names of organizations or businesses for which net remunerative outside activities were performed, the type of activity (consulting, teaching, research, writing, etc.) and the aggregate time spent (days) in that activity. Royalties from writing and patents need be reported only in the year that they first appear.
3. You must name the organization or source and indicate the aggregate amount of time in days spent in outside activities with that organization. If you received \$5,000.00 or more compensation per year from a single source, you must check the last column of section A. If you believe you should not publicly identify the name of the organization, you must receive approval from your dean to withhold the name (e.g., if revealing the name would be damaging to the organization's legitimate competitive interests).
4. Any remunerative relationships that you had with organizations which sponsor university research, teaching or training in which you are involved. If these relationships exist, you must report the name of the organization.
5. Officerships, directorships, trusteeships that you or members of your immediate family hold in businesses or commercial organizations related to your professional field.
6. Ownership interests in organizations related to your academic area of specialization, provided that your immediate family collectively owns more than 10% of the equity.

If an apparent conflict of interest is identified, the Institution shall contact UW System Human Resources for discussion and resolution. UW System Human Resources, the Office of General Counsel and the Institution will review and resolve the conflict and attach related documentation to the form.

Those activities which need not be reported include:

1. Activities for which remuneration comes from university administered funds (e.g., teaching and innovation awards, etc).
2. Remunerative ordinary professional activities (see definitions above).
3. Instruction at another nonprofit educational institution or research supported by a government agency if the instruction or research is performed during periods when the staff member is not on the university payroll, or, in the case of part-time appointment, if the work is performed during time not contracted to the university.

Institutional Ethics Committee:

[Wis. Admin. Code § UWS 8.035](#) requires that each institution shall have an institutional ethics committee, “whose function shall be to provide to any member of the unclassified staff consultation and advice on the application” of [Chapter UWS 8](#) Unclassified Staff Code of Ethics. The institutional ethics committee can either be established or designated as part of an existing committee.