Considerations in the creation of your MANAGEMENT PLAN

1. Disclose
   External interests / activities related to your institutional role.

2. Role
   Is this a fiduciary, management, or operational role?

3. Nature of Interest
   What type of interest is this? Ownership (equity, stock, etc.), consulting, speaker bureaus, etc. Is it a public, private, or not-for-profit entity? Is this equity, financial, or intellectual property?

4. Relation
   Is this contractual, advisory, or speaking?

5. COI
   Based on the above, the disclosed interest is evaluated and existence of a COI is determined.

6. Manage
   If management is warranted, the individual will be notified through iRIS to review and accept the approved plan.

7. Review
   The individual must accept and sign-off on the management plan. The reconsideration request is in iRIS for any areas in which the individual does not believe compliance is feasible.

8. Monitor
   The management plan is effective until further notice. The individual and their appropriate authority, as assigned on the plan, should discuss and monitor the managed COI.