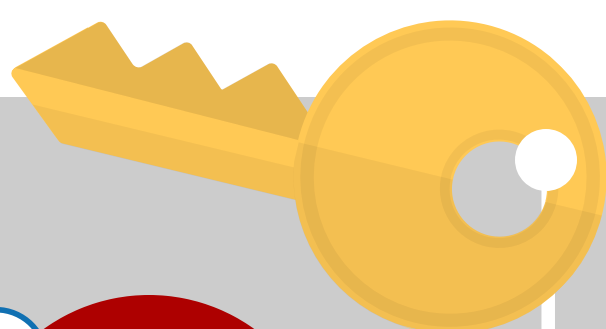


Considerations in the creation of your **MANAGEMENT PLAN**



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?

6

Manage

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

5

COI

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

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.