

# UC SMG OPA Policy and Procedures Reference Sheet

*\*Note: this sheet is for reference purposes only; please refer to the policy document for official, comprehensive guidelines and information*

## Regents Policy 7707 ([Official Policy Document](#))

While outside professional activities performed by SMG members are often mutually beneficial to the University and the members themselves, the primary commitment of SMG members must be to the fulfillment of their regular University responsibilities. Regents Policy 7707 applies to all University of California SMG members, including those who have underlying faculty appointments. During the period SMG members possess a dual academic and SMG appointment, their participation in outside professional activities will be subject to this policy and not that of the Academic Personnel Manual.

Senior Management Group (SMG) members and their Approving Authorities are accountable to the President and Regents for ensuring that conflicts of commitment or interest (actual or perceived) do not occur and that any activities and affiliations do not diminish the reputation of the institution or system.

- **Outside Professional Activities (OPA):** activities within SMG member's area(s) of expertise for which they are employed by the University and include Board memberships (uncompensated or compensated at any amount) or other activities for which an SMG member is compensated in excess of \$2,500 per calendar year for each activity.
- **Uncompensated OPA:** activities for which SMG members receives no compensation and/or the full amount of compensation is donated by the SMG, whether to the University or another appropriate non-profit organization.
- **Compensated OPA:** activities for which SMG members receives any form of compensation, including deferred compensation, stock grants, or other types of compensation; travel costs are not considered compensation for purposes of determining level of compensation for an activity.
- **Compensated OPA Limit:** SMG members limited to 2 *concurrent compensated* board activities OPA
- **Approving Authorities:** SMG member's immediate manager and next highest-level supervisor, which in most cases includes the Chancellor, University President and/or the Chair/Vice Chair of the Board of Regents.

## SMG OPA Responsibilities:

1. Discuss prospective OPA with immediate supervisor
2. Complete and sign necessary approval materials
3. Submit signed approval materials to campus SMG Coordinator
4. At close of each calendar year, review, update, sign and return OPA Certificate/Report prepared and sent to you by SMG Coordinator

### Approval Materials and Links

- [OPA Submission Form](#)
- [OPA Detailed Information Form](#)
- [SMG Coordinators by Campus](#)

## FAQs (also, see FAQ section in policy doc):

- When can announcement be released about SMG's OPA involvement? → *After discussion with direct supervisor and submission of request for review and approval.*
- I have 2 compensated Board Activities, can I pursue another compensated OPA? → *Only if you deny or donate the compensation for the new or one of the existing two compensated board activities.*
- Do I need to submit recurring OPA, either uncompensated or compensated? → *Yes, all recurring OPA need to be submitted each year.*

**YOUR CAMPUS SMG COORDINATOR IS YOUR PRIMARY CONTACT FOR QUESTIONS**