

Peer panel discussion about consulting activities

Academic Assembly Welfare and Benefits Committee

April 22, 2025, 9:00 a.m. to 10:00 a.m.

Presented by

- Whitney Brim-DeForest, Rice and Wild Rice Advisor
- David Haviland, Entomology Advisor
- Sarah Light, Agronomy Advisor
- Steven Worker, 4-H Youth Development Advisor

Academic Assembly

The mission of the **Academic Assembly** is to address the professional needs of UC ANR academic employees and provide a forum to enhance the impacts of UC ANR programs.

- Advise and assist the UC ANR administration in maximizing Cooperative Extension's usefulness to the UC and the people of California.
- Study, develop, and recommend policies and procedures for the benefit and welfare of academic employees of UC ANR.
- Promote communication between and within UC ANR and UC.

→ **Today's webinar organized by the Welfare and Benefits Committee.**

We are a standing committee responsible for review and input on UC rights and benefits of academic appointments. Pursue with administration means to improve, clarify, add, or modify the benefits and privileges of the Academic Assembly.

Policies and procedures

Approval flow and timeline

Whitney Brim-DeForest, Rice and Wild Rice Advisor

UC Policies

[UC Academic Personnel Manual Section 025](#) - Conflict of Commitment and Outside Activities of Faculty Members and Designated Other Academic Appointees.

Academic HR is in the process of updating the ANR [Policy and Procedure Manual \(PPM\) PPM 345](#): Consulting and Other Outside Professional Activities, in response to the [updated UC APM-025](#). Academic HR will provide a system-wide update on our consulting policies and processes.

Definitions

Conflict of Commitment - A conflict of commitment occurs when a faculty member's or other academic appointee's outside activities interfere with the faculty member's or other academic appointee's professional obligations to the University of California.

Conflict of Interest - This policy does not cover conflict of interest; it covers only conflict of commitment.

Outside Consulting - Outside consulting is one type of outside professional activity. It is defined as professional advice or services related to a faculty member's or other academic appointee's field or discipline, whether compensated or uncompensated, that furthers the interests of an entity outside of the University of California.

Category 1 - most likely to create a conflict of commitment

Category 1 compensated outside professional activities requires approval and annual reporting.

- Assuming a managerial position in a for-profit or not-for-profit business;
- Administering a grant outside the University that would ordinarily be conducted under the auspices of the University;
- Establishing a relationship as a salaried employee outside the University;
- Teaching performed outside the University – including accepting an adjunct community college or CSU position;
- Engaging in other compensated outside professional activities which common sense and good judgment indicate are likely to raise issues of conflict of commitment.
- All foreign activities

Category 2 - typically shorter-term outside professional activities ... have a lesser potential for a conflict of commitment than do Category I activities

Category 2 compensated outside professional activities requires approval and annual reporting.

- Providing expert testimony in administrative, legislative, or judicial proceedings;
- Providing consulting services or referrals;
- Serving on the board of directors of an outside entity;
- Providing a workshop for industry;
- Undertaking compensated outside professional activity not mentioned in Categories I or III, that common sense and good judgment indicate are not likely to raise issues of conflict of commitment.

Category 3 - within the course and scope of University employment ... unlikely to raise conflict of commitment issues.

Category 3 compensated outside professional activities do not require approval and annual reporting.

- Serving on a federal, state, or local government agency committee, panel or commission;
- Acting in an editorial capacity for a professional journal;
- Reviewing journal manuscripts, book manuscripts, or grant or contract proposals;
- Attending and presenting talks at scholarly colloquia and conferences;
- Developing scholarly communications in the form of books or journal articles, movies, television productions, and similar works, even when such activities result in financial gain;
- Serving as a committee member or as an officer of a professional or scholarly society;
- Accepting a commission for an artistic or scholarly work or performance that is considered an integral part of the academic appointees' academic portfolio;
- Accepting honoraria (other than those received for Category II activities) and prizes.

A few key points

- Faculty may engage in Category I and II outside professional activities for up to 48 days per year (for 100% appointments).
- UC ANR requires prior approval to perform a Category I or II outside professional activity, and requests must be submitted at least 30 days prior to the beginning of the activity.
- The use of University resources in connection with outside professional activities is subject to limitations.
- The University's liability and workers compensation coverage does not extend to activity that is outside the course and scope of University employment.

Approval Flow

- Submit through UCANR Portal
- Edit Profile
- “Consulting”
- Enter consulting information
- Press submit
- If no response, print PDF
 - Email to CD, Daniel Obrist, Brent Hales, Lynn Schmitt-McQuitty, Tina Jordan, and Bethanie Brown

My Academic Consulting and Other Professional Activities List

Add New Consultation or Other Professional Activity		ANR Consulting Procedures	
General Description	Dates	Leave	Approval
Chico State University	1/27/2025 - 5/16/2025		Pending Approval
Chico State University	8/27/2024 - 12/5/2024		Pending Approval
Chico State University	1/26/2024 - 5/17/2024		Pending Approval
Chico State University	1/26/2023 - 5/11/2023		Request Approved
Chico State University	8/25/2022 - 12/8/2022		Pending Approval
Chico State University	8/26/2021 - 12/10/2021		Request Approved
United States Department of Agriculture	8/23/2021 - 9/8/2021		Request Approved
United States Department of Agriculture	8/17/2021 - 8/27/2021		Request Approved

Whitney Brim-DeForest, Rice and Wild Rice Advisor

Category 1: Teaching as an Adjunct/Lecturer

My specific experience:

- Lecturing at CSU Chico since fall of 2018
- Member of faculty in College of Agriculture, Plant Sciences Department
- Approval every semester from UCANR
- Teach 1-2 courses per semester, sometimes as lab instructor only, sometimes as sole instructor
 - Courses taught:
 - Intro to Plant Science (lab only)
 - Plant/Crop Physiology
 - World Food and Fiber
 - Agroecology (lab only)
 - Food Forever
 - Soil Health and Regenerative Management (lab only)

Positives

- Great professional competence
- About \$1500/month per course for the year (on average)
 - Salary varies based on number of units
- Connecting to academics/colleagues at CSU
 - Very close working relationship
 - Collaborate on grants, etc.
- Different perspective from UC about department, procedures, etc. (good insights)

Positives

- Good CV builder for future employment (on-campus positions)
- Can supervise/advise graduate students
- Great source of student interns, future employees:
 - Many Sutter-Yuba and Butte staff are prior students
- Opportunity to connect students to UC Campuses for graduate school as well
- Opportunities for professional development
 - Different than courses offered at UC

Negatives

- Time-consuming (student demands on time)
- Curriculum development if never taught a course before (this is A LOT of work)
- Grading!
- Can sometimes be difficult to commit to teach for a certain time period for several months

Sarah Light, Agronomy Advisor

Type II Consulting

How do you find clients:

- Variable, challenging, and often unexpected
- They come to you
- Personal and professional network
- Requests that don't fall into your scope of work
- Networking: tell people you are looking and what your expertise is
- Pipeline can be long—keep things flowing
- Don't pass up on good opportunities

Type II Consulting—Setting an hourly rate

Consulting is work. Period. You have to make it worth your time.

- Charge a lower rate for a client who gives you more hours, or who provides consistent consulting work
- Charge a higher rate for others
 - This helps account for time spent finding the new client
 - You will have potential clients who never result in a contract
- Suggestion: 4-5x your “hourly rate”
 - You are paying ALL the taxes yourself
 - You are saving the company money because they aren’t assuming the risk of an employee or paying for your benefits.

Type II Consulting–SOW and Meeting Deliverables

- Be honest with yourself about your skill set and time
- We can all use an extra money but if it adds stress, or you have to work extremely long hours, it may not be worth it.
- Can use Consulting Leave Time
 - Companies usually hire consultants for time-sensitive, short, projects. Thing they don't want a permanent staff for.
 - balancing UCANR responsibilities and consulting
- Set a SOW and clear deadlines as early as possible
 - avoid FREE consulting.
 - contracts may fall through—that's OK
 - a written SOW helps avoid confusion.
 - Add time estimates and dates for each task.
- Ask about and consider client privacy concerns

Invoicing and Taxes

Invoicing

- Ask the company what level of detail they need and how frequently they want to be invoiced
 - avoid sticker shock
 - tie to SOW task
- Follow a standard invoicing format

Taxes

- Roughly a third of consulting income
- Pay quarterly taxes, or a small fee
- Write off reasonable home office and other consulting related expenses
- Prepare for this—and avoid stress

Final Thoughts:



- There are a lot of ways to make our jobs “worth it”
- Best advice I have gotten: “take advantage of all international travel opportunities”
- Consulting time can be used for international volunteerism—my favorite consulting experience to date.
- Do consulting in so far as it enhances your professional and personal life
 - our jobs are hard enough already

David Haviland, Entomology Advisor

Outside teaching activities

- Often at community colleges, in person or online
- M.S. degree is adequate
- Sometimes recruited in advance to generate a 'teaching pool'
- Requires dedication and accessibility to students
- Lots of work the first time around (curriculum + platform), then easier
- My experience (~\$5,500/course/semester)
- Dossier value- Professional competence

Educational courses or trainings

- Often with private companies
 - Trainings or educational events that help them make money
 - You train people, but don't sell their product
- Personal example (Spider mite management)
 - Sales staff education trainings
 - Marketing perspective meetings (re: the competition)
 - Private product launch meetings with clientele
 - 3.5 hr. Haviland shortcourse, followed by 30 min Company sales pitch, then lunch
 - \$8,000 + expenses for 3 trainings
- Dossier value- Professional competence, Extending knowledge

International consulting

- Often to solve a specific problem
 - Have to be subject matter expert
 - Need excellent problem-solving skills
 - Communication skills a must
 - Language skills a huge perk
- Typically mid to late career
 - Usually following travel events with industry exposure (not academic conferences)
- Dossier- Professional competence
- Personal example 1
 - Sabbatical leave to Chile
 - Chile → Argentina → Peru → Sonora → Brazil → Costa Rica → Yucatan
 - Consulting fees of \$1,000/day plus expenses are typical
- Personal example 2
 - Spoke at an almond conference in CA
 - Australians saw value, asked me participate in a conference and week-long tour
 - Consulting fees- 100% expenses, no consulting fees, but a week in Australia

Expert witness work

- You have to be the best of the best
 - Lawyers get 1 expert per topic
 - They want their expert to be the most credible
- Generally not something we do
 - We typically see both sides of an argument
 - Lawyers want to prove their side
- Personal experience
 - Multiple cases. Typically \$300-\$350/hr.
 - Experience has been positive, but not for the faint-hearted
- Dossier- Professional competence
- Advice
 - Make sure you are the expert before saying yes
 - Make sure that neither you nor UC are an interested party
 - You speak for yourself, not for the University
 - Be clear in what you know, and don't know, citing evidence
 - Often you will review materials, provide advice, and write reports
 - Cases often settle before depositions
 - Be prepared to weather cross-examination
 - Keep good records of time, send invoices frequently

General thoughts- Category II activities

- It's hard to find Category II consulting opportunities... they find you.
 - Often by referral and word of mouth
 - Success begets success
- People seeking consultants are rarely looking for 'an' expert... they are looking for 'the' expert.
 - Find professional niches and stack levels of proficiency
 - Are you an expert?... the expert? ...or the only expert with a particular skill set?
- Be patient
 - Consulting is typically a mid- to late-career activity
 - Focus on being an Advisor first
 - The same activities that result in merits, promotions, accelerations and awards are the same activities that generate opportunities to consult
 - Make opportunities to travel

Steven Worker, 4-H Youth Development Advisor

Really not much to add with the fantastic advice from the previous three Advisors! Mine are all Category 3

- NSF grant program review panels (review time + 2 days; \$200/day honorarium).
- Presenter for National 4-H Thriving Evaluation Capacity Building Webinars (2, 2-hour presentations; \$250 honorarium)
- Expert advisor on Smith College Teenagers and Young Adults as Teachers (TAY-AT) Programs Steering Committee (3, 2-hour meetings; \$2,000 1099-NEC).
- Subject matter advisor on County Office of Education's Cal-Math/Science/Computer Science educator professional learning implementation team (1 ½ hour monthly meetings over 11-months; \$1,500 stipend).

Reflections

- Strong relationships established over time (and positive reputation) increases the likelihood that partners will invite you to serve in these types of roles.
- These roles help broaden and extend professional network! (and learn, re: about grant proposals)
- Extra compensation is nice, as is putting these activities on PR dossier as evidence of professional competency.
- These short-term roles have allowed me to maintain work-life balance (with 2 young children) while earning modest additional income.

Questions for all Panelists

 **UNIVERSITY OF CALIFORNIA**
Agriculture and Natural Resources

Future Activities

- Join us for our next webinar about sabbaticals on May 28th
3:00 pm-4:00 pm
- Have ideas for other topics? Fill out the poll or add them to the chat