

University Of Massachusetts Lowell	
Date: July 01, 2001	Section:3.9
Subject: Consultant Services	

A “consultant” shall mean any person who, as a non employee of the Commonwealth, gives advice or employee training and whose compensation is payable from subsidiaries HH or NN. No people employed by the University, as a consultant, shall directly or indirectly supervise another temporary or permanent employee of the University. A consultant is required to render a written report prior to final payment.

Selection of Consultant

The process for selection of a consultant to perform services for the University shall be as competitive as practicable under the circumstances.

Contracting for Services requires a complete executed copy of the State Standard Contract Form, with specific duties, along with a purchase requisition. All documents must be in the Purchasing Department before services begin. The department will be responsible for obtaining all the necessary signatures.

The requisition and State Standard Contract form should include the following information:

1. Consultant’s legal name, address, including zip code.
2. Period for which the services are to be engaged.
3. Specific duties and responsibilities of the consultant.
4. Rate of compensation for services.
5. Proper accounting information
6. Signature of the Department Head and/or the person exercising budgetary control.
7. Extensive Sole Source Justification form for services over \$50,000; or detailed specifications for competitive bidding.

The State Standard Contract Form can be obtained by downloading the form, from the Purchasing Office Web Site.

No consultant to perform services classified under subsidiary HH and NN costing over \$50,000 annually, may be awarded, except pursuant to competitive bidding, use of a contract vendor, or submission of a **extensive** Sole Source Justification Form.

Consultants are responsible for making their own estimated income-tax and self-employment-tax payments, and because they are not employees, are not entitled to fringe benefits such as employer-paid retirement and insurance.