

Contracts to Obtain the Services of a Consultant

Pursuant to N.C.G.S. §143-64.24(8), the Board of Governors adopts the following policies and procedures governing contracts to obtain the services of a consultant by the constituent institutions and other units of the University of North Carolina.

- I. “Consulting services” shall mean work or task(s) performed by governmental entities or independent contractors possessing specialized knowledge, experience, expertise, and professional qualifications to investigate assigned problems or projects and to provide counsel, review, analysis or advice in formulating or implementing improvements in programs or services. This includes but is not limited to the organization, planning, directing, control, evaluation, and operation of a program, agency, or department.
- II. The Chancellors, or the Chancellors’ designees, are authorized to approve contracts for consulting services to a constituent institution when the services are determined to be in the best interest of the University, and the amount is not above the constituent institution’s management flexibility purchasing benchmark.
- III. The University of North Carolina Vice President for Finance is authorized to approve contracts for consulting services above the constituent institution’s management flexibility purchasing benchmark.
- IV. Contracts for consulting services for a constituent institution shall be:
 - A. Consistent with all applicable policies and procedures adopted by the constituent institution for the procurement of services, including policies and procedures for personal and professional services, competitive bidding, and sole-source justifications.
 - B. Reported to the constituent institution’s Board of Trustees at least annually.
 - C. Reported to the University of North Carolina Vice President for Finance at least annually.
- V. Contracts for consulting services for other units of The University of North Carolina shall be:
 - A. Approved by the President or the President’s designee consistent with all applicable policies for the procurement of services including policies and procedures for personal and professional services, competitive bidding, and sole-source justifications.
 - B. Reported to the University of North Carolina Vice President for Finance at least annually.
- VI. Contracts for the use of individuals for instructional services, curriculum development, and conducting academically oriented research, formerly covered under Board of Governors Policy Guideline §600.5.4[G], remain exempt from the State Consulting Act, and are exempt from the reporting requirements of Sections IV and V of this Policy, but must comply with all applicable policies and procedures adopted by the constituent institution or other unit of the University of North Carolina for the procurement of academic and research consultant services.