Consultant Contracting Procedure

Purpose
This procedure outlines the process for engaging external service providers at Florida Institute of Technology. Topics covered include: when a Consulting Agreement is required, competitive bidding, determining if an individual is an independent contractor or an employee, the role of Procurement Services, required documentation, and signature authority.

Definition
A Consultant is a paid advisor who is to provide professional or expert advice in an area such as security, accounting, management, finance, law, information technology, construction, engineering, design, architectural services, science, marketing, contracting, public relations, or any of a number of specialized fields. The University will occasionally need to hire a Consultant when expert knowledge, skills, or advice are needed.

The selection of a Consultant should be based on the qualifications of the Consultant and their ability to provide the needed expert advice, service, or resources. The cost of hiring the Consultant is an important consideration and the benefits of hiring the Consultant should be weighed against the cost.

Procedure
Identify Business Need
Once a Requester identifies a need for consultant services, he or she is responsible for documenting the business need and funding, and for determining that the costs are reasonable and allowable.

Documentation of the business need for a purchase is an important part of the purchasing transaction record and must be attached to the Purchase Requisition for purchases. In addition to supporting effective financial management, this documentation is required during bidding and when requesting quotes.

Is the Individual a Current University Employee?
If the individual is a current employee, please refer to Human Resources for guidance. If the individual is not a current employee, continue with the next step.

Follow Competitive Bidding Guidelines
Once the Requester has identified the business need for the purchase, determined that the purchase is allowable and reasonable, the Initiator must follow the Competitive Bid Procedure and document the selection process accordingly.
Complete the Consulting Agreement
The Department Head or Initiator must submit a completed Consulting Agreement to Procurement Services. The completed agreement must be signed by both the Consultant and an authorized University signer. Alternate agreement forms may be accepted if they are in the form of a Proposal/Agreement and include a place for both parties to sign and date.

Creating the Purchase Requisition
If the Consultant (vendor) is not already in Banner, the Initiator must work with the vendor to complete the University’s Vendor Registration Package and forward it to the Purchasing Department for processing. The Buyer will review, and if approved, create a new vendor number in Banner. The Initiator will be made aware of this number to enable the department to create their requisition.

To Create a Requisition for the Consultant, please note the following:
- Uncheck “Doc Accounting” on the requisition
- Submit support documents and the signed Consultant Agreement to Procurement Services at purchasing@fit.edu
- Watch the approval queues to track the requisition’s approval

Creating the Purchase Order
Once the Purchase Requisition has final approvals, it will electronically route to the Buyer in Procurement Services for Purchase Order preparation and release. An email is automatically released to the Initiator once the Purchase Order has been sent to the vendor.

Signature Authority
Only those officers or employees who have been given signature authority by the Board of Trustees, or who have been delegated authority as prescribed by the Board of Trustees, can execute and deliver instruments, contracts, receipts, and other documents to which the University may be or become a party. Unless delegated this authority, no others are authorized to sign University contracts and agreements.