



UNIVERSITY CONSULTANCY POLICY UB-PO-BT-001/0

1. Background and Purpose

The University of Belize recognizes the importance of providing consultancy services to external parties as a mechanism for transferring its knowledge and expertise. The consultancy activities can generate income for the University, its faculty, and staff to support the social and economic change in the communities served by the University and impact all parties for the public good. The University further values the benefits of external engagements to the institution, faculty and staff professional development, and contributions to academia. The policy provides a framework for the institution and its faculty and staff to obtain and perform consultancy services.

2. Scope/Users

The provisions within this document cover all faculty and staff.

3. Definitions/Terms/Acronyms

I. **University Consultancy:** This type of consultancy refers to consultancies contracted by the University and assigned to faculty and staff to provide expertise or professional service.

II. **Private Consultancy:** This type of consultancy refers to individual consultancies where a member(s) of faculty and staff undertake professional work independent of the University.

III. **Technical Consultancy:** Provision of external clients' access to the institution's infrastructure or equipment not readily available in the community.

Below are the details of the various consultancies.

University Consultancy

This type of consultancy refers to consultancies contracted by the University. The institution strongly encourages this consultancy approach that usually supports Belize's national development. The University will apply and compete for such consultancies providing that it has

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the proven core technical resources, skills, and the time in its Faculties to execute the external engagement. These skills may be complemented by Belizean and external professionals or University partners. The Office of Institutional Advancement and the Lead Professional or Faculty Dean/Chair of the project, Project Funder, and the Budget and Financial Department typically manage such consultancies. University faculty and staff will be compensated based on their contributions to the project.

Private Consultancy

This type of consultancy refers to individual consultancies undertaken by university employees. Faculty and staff may be approached by external parties to perform professional work based on their areas of expertise, abilities to deliver on the project's goals, and prior experience. Faculty and staff may also compete privately for self-consultancies. The consultancy would be carried out outside of UB duties and responsibilities and would not interfere with the primary roles and responsibilities of the faculty and staff.

All consultancies need to be fully disclosed to the University. All consultancy engagements must adhere to the appropriate University procedures and follow the approval process before the commencement of the professional service. If any of the University's resources will be used to conduct the private consultancy, then the faculty and staff will seek formal approval from the University and compensate the University for such use. In circumstances where there is any usage of professional time, a separate agreement with the University may become necessary to implement, such as buying out of university time. Similarly, where there is significant demand for the University's physical and/or human resources, these activities must be fully costed, and the University has to be compensated. After disclosure is made the consultant would have to sign a document that the private consultancy was not attained through affiliation with the University.

Private consultancies cannot use the University's name nor in any way put the University at risk. Faculty or staff engaged in any private consultancy shall indemnify the University from any loss or damage that may be incurred due to the consultancy provided by the faculty or staff, particularly if the University's resources are utilized.

Technical Consultancy

Technical consultancy is also a university-supported professional service. This type of consultancy will generally be sought by external parties, institutions, and organizations when the contracting client does not have the required facilities, human resources, and/or equipment needed to carry out the project. In these instances, the University can agree with the external party to provide access to its facilities and resources such as laboratories, field stations, library, IT, lecture rooms, and support personnel to manage the facilities/equipment requested for the project's duration. The Office of Institutional Advancement and the Budget and Financial Department, and the technical expert will manage these consultancies closely. University faculty and staff will be compensated based on their contributions to the project.

4. Policy Statement

Consultancy at the University of Belize may apply to external work undertaken by the institution's full-time faculty and staff who are either permanently or temporarily employed. All contracted external work falls under the University's consultancy activities except for the listed activities.

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- a) Assigned duties of faculty and staff at the University are inclusive of:
- I. Academic activities, such as teaching, evaluation, advising, supervising, research, and service
 - II. External examining
 - III. Authorship or royalties associated with published material
 - IV. Peer reviewing and refereeing of papers, books, manuscripts, and grant proposals
 - V. Conference attendance and presentations
- b) Other activities that have a national/regional impact and are compensated at market rates may apply for exemptions from the consultancy requirements. These activities include:
- I. Service on public sector Boards or charitable Committees
 - II. Trade union duties
 - III. Professional arts performances
 - IV. External work conducted outside of working hours that falls outside of the faculty/staff duties (for example, a family business)
 - V. Any other activities as approved by the President and meet guidelines per the appropriate University documents.

The University should ensure that the consultancy:

- I. Adheres to the appropriate University procedures and follows the approval process before the commencement of the professional service.
- II. Attained by the University gives priority to qualified faculty and staff and is fairly and transparently distributed among employees.
- III. Fairly compensates the institution for all resources accessed during the course/duration of the private or individual engagements.
- IV. Complies with the agreed-upon arrangements involving faculty and staff for the university-supported Consultancy projects.
- V. Utilizes a Register to record external work contracted and names of faculty and staff providing the service for accountability and create a databank of high-level professional expertise available at the University. The Office of Institutional Advancement maintains this Register.
- VI. Complies with the established quality assurance mechanisms for all consultancies, including the timely delivery of outputs and quality of final reports. These mechanisms are vital to ensure the University's reputation.

The consultancy should not:

- I. Affect the work of the faculty or staff, or students at the University
- II. Result in unnecessary financial risk to the University
- III. Be perceived as a conflict of interest
- IV. Contravene university or public sector rules and regulations
- V. Result in disgrace to the University or bring the University into disrepute.

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5. Relevant Legislation

The University of Belize Act Chapter 37 (Revised Edition 2000)

6. Key Related Documents

Faculty and Staff Handbook

Accounting Policy & Procedures Manual

Consultancy Procedures (to be developed)

7. Policy Approval and Review

This policy is approved by the Board of Trustees and will generally be subjected to a five-year review. Any and all amendments to this policy shall be submitted to the Board of Trustees for approval. Amendments to the policy should be submitted to the process owner and stakeholder reviews conducted prior to the approval by the Board of Trustees.

8. Amendment History

Revision #	Description of changes	Reason(s) for the change	Date of revisions
0	Initial Release	Not applicable	16-12-2022