CONSULTING AND FREELANCING GUIDELINES

UNIVERSITY ADVANCEMENT

The following guidelines are provided to assist University Advancement staff to understand the responsibilities and freedom associated with the provision of consulting and freelancing services to external clients.

Definition:

Consulting shall be defined as the provision of expert advice, counsel and/or recommendations to other post-secondary educational institutions with respect to development, alumni relations, public and or government relations or advancement services or other service based on the professional training and experience of the staff member.

Freelancing shall be defined as the provision of services to external non post-secondary educational organizations.

Guidelines:

1. Any and all external consulting including that for other post-secondary education institutions will be subject to the express permission of the Vice President, University Advancement, and where applicable the appropriate director. Such permission must be requested in writing in advance of the assignment, and must identify the applicable start and end dates and the amount of time to be dedicated to the assignment.

2. All consulting activity is considered to be the personal business of the individual, and must not therefore involve McMaster University. The views expressed, opinions provided and recommendations made are those of the consultant and do not reflect in any way the position of McMaster University.

3. All financial arrangements will be made with the client and the consultant. Written communication between the consultant and the client will be conducted on private letterhead and all costs associated with the consulting activity will be directly born by the consulting employee including but not limited to administrative costs, word processing, postage, telecommunications, fax and travel.

4. Consulting activities will be conducted on personal time (e.g. unpaid leave, vacation, week-ends or after hours.)
5. Any consulting activity, which requires the use of University facilities and supplies, will be charged to the consultant. In such a case, the consultant will be responsible for obtaining prior approval from the Vice President, University Advancement for use of McMaster supplies and facilities based on a written statement as to the nature of the expense to be incurred.

6. Any freelancing services provided by University Advancement staff while conducted on personal time, will not involve McMaster University in any manner what-so-ever, and shall not interfere with normal work routine and resources.

Code of Ethics:

University Advancement employees:

1. Will not undertake consulting or freelancing activities, which will interfere with the satisfactory fulfillment of his or her University responsibilities.

2. Will not use University facilities or services for consulting activities without express prior permission and an agreement to fully reimburse the University for assumed costs.

3. Will not use University funds for consulting expenses.

4. Will not undertake consulting or freelancing projects, which create a potential conflict of interest with McMaster University. If in doubt, the employee will consult with the Vice President, University Advancement.

5. Will not disclose McMaster University business activities, confidential or proprietary information pertaining to alumni, or the names of donors or prospective donors.

Agreement:

I, ______________________________ an employee of University Advancement have read and understand the foregoing and agree to be bound by the provisions of this policy in any and all consulting and freelancing activities in which I may engage during my tenure with McMaster University.

______________________________   ________________________________
Employee/Consultant               Witness

______________________________
Date:

Please return signed copy to the Office of the Vice President, University Advancement – Gilmour Hall, room 205