

## **UUCWC POLICY AND PROCEDURES FOR PROCURING SERVICES**

*(Effective 3/2004 (Finance Committee revised "plain language" version: 9-13-10)*

### **A. POLICY**

1. If your committee wishes to procure services for a capital improvement or other services relating to the functioning of the church, *which are estimated to exceed \$1,000*, you must solicit formal estimates from at least 3 vendors (service providers or contractors).
2. If the proposed cost of the service is not covered within the Committee's annual budget, the Committee must make a recommendation to the Finance Committee for review. This includes any recommendation to make use of reserve funds. If the Finance Committee agrees with the recommendation, it will then make its recommendation to the Board for final approval of a possible change to the church's budget.
3. At least every three years (or next contract expiration date, if longer), committees with existing vendor relationships should obtain bids from at least three vendors (may include the current one) for future services.
4. Our Board President (or a designee) signs all contracts with vendor.

### **B. PROCEDURES**

Your committee should procure the formal estimates using the following steps:

1. Determine if the proposed cost of the service is covered within the Committee's annual budget. If not, the Committee must contact the Finance Committee to discuss possible costs and funding options. If the Finance Committee agrees that the procurement process should at least proceed with obtaining proposals, it will make a recommendation to the Board regarding the need to change to the church's budget or fund the project through some other means, such use of reserve funds.
2. If proceeding with obtaining vendor proposals, the committee should check with church staff, former chairs or members of its committee, the Treasurer, and other knowledgeable people regarding existing vendor relationships, vendors used previously for similar projects, and for any other thoughts regarding applicable potential vendors, in order to get any feedback on past work or to get other suggestions.
3. The sponsoring committee then should solicit estimates from at least 3 vendors that fit its criteria. One vendor may be an existing one, if the committee wishes to consider their future services.
4. Once all vendor proposals have been procured, the committee can make its decision on choice of vendor if within its budget. Otherwise, as noted above, the committee must return to the Finance Committee with its recommendation and reasons, so they can then make a recommendation to the Board. The Finance Committee may ask the requesting committee to obtain further vendor proposals or to revise the scope of services (e.g., if proposed charges are higher than previously anticipated) and obtain revised proposals.
5. If the recommendation goes to the Board, it will promptly advise the sponsoring committee if it supports the decision on the recommended vendor and change to budget or reserves.
6. The President of the Board (*not* the particular committee chairperson) signs all awarded contracts, in consultation with the Treasurer (and the Board attorney, if applicable).