

PROCUREMENTS:

Procurements and contracts made by West Shore Unitarian Universalist Church (WSUUC), including those on behalf of the West Shore Child Care Center (WSCCC), are subject to the following requirements:

Regularly reoccurring work and service approvals

Regularly reoccurring work is defined as expenses that are included in the annual operating budget. Regularly reoccurring work and services are to be procured and managed by the Senior Minister or written designee(s).

Non-Emergency Procurements:

Non-Emergency work is defined as a related purchase/ contract that is not needed to address an imminent risk to the Church building, grounds, operations, or occupants and is not included in the annual operating budget. *Care should be given to prevent the division of work in a project to circumvent the following dollar limits:*

- **Non-Emergency Work/Procurements \$0-25,000:** At least two written, competitive estimates/quotes should be obtained, where possible, and the vendor approved in writing by the Senior Minister *or* written designee(s)
- **Non-Emergency Work/Procurements > \$25,000:** At least two written, competitive estimates/quotes will be secured, where possible, and the vendor approved in writing by both the Senior Minister *and* written designee(s)

Emergency Procurements:

An emergency is a situation that requires immediate remediation to minimize damage to Church operations and assets, and any threats to the safety and health of Church employees, congregants or visitors. In an emergency:

- The Senior Minister *or* written designee(s) should make a reasonable effort to obtain two estimates/quotes for work, and if that is not possible, may procure the necessary repairs or service without multiple quotes up to a limit of \$25,000.
- Emergency expenditures greater than \$25,000 require written approval of the Senior Minister *or* written designee(s) for the specific expenditure, *and* the President of the Board of Trustees, regardless of the number of estimates/quotes for the work.

Contract Signing Authority- *applies to Emergency and Non-Emergency Work:*

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Contracts for work up to \$25,000 may be signed by Senior Minister *or* written designee(s). Contracts in excess of \$25,000 must be signed by both the Senior Minister *or* written designee(s) *and* an officer of the Board of Trustees, as specified in the current Church by-laws.

Contract Requirements:

- Product and Service related contracts over \$5,000 shall include:
 1. Clearly defined scope of work, including detail of work or product being purchased
 2. Start date and duration
 3. Liability and Workers Comp certificates from vendor
 4. Completed W-9 form from vendor
 5. Payment terms with no more than 50% upfront deposits
 6. Fixed contract price. Contracts based on hourly rates or time and material should be avoided whenever possible
- Contracts that require labor and/or installations should be paid in increments as work is completed
- Final payment should not be disbursed until 100% of work is satisfactorily completed

Note:

In the case of a large capital expenditure, the Church Bylaws dated March 3, 2019, require approval of the eligible voting Members, in addition to the requirements contained within this document:

Twenty percent (20%) of the eligible voting Members constitutes a quorum, except for the following cases when the quorum shall be thirty percent (30%) of the Members:approving a capital expenditure greater than thirty-three percent (33%) of the Annual Operating Budget.

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Revision History:

Description of Revision	Date of Approval of Revision	Approver
New Policy	November 8, 2020	WSUUC Finance Committee
Update limits for approving contractors and approved contract signers Remove 10% retainage	March 17, 2022	Finance Committee
Update limits for approving contractors and approved contract signers Add reference to related Church Bylaw requirements	April 28, 2022	Board of Trustees