

## UUFSD Policy and Procedure Document

Policy ID: 350

**Title:** Policies and Procedures for Hiring Contractors and Other Professionals

**Date Approved:** May 15, 2019 by the Board of Directors

**Part 1. Construction and Miscellaneous Projects:** The Unitarian Universalist Fellowship of San Dieguito, whenever possible, encourages volunteers from our talented and diverse community of members and friends to perform or complete maintenance, repairs, food preparation, event organization or other similar tasks needed to support the Fellowship.

When it becomes necessary to hire professionals to perform these functions and any others of a similar nature needed to support the Fellowship, it is the Policy of the UUFSD to hire outside professionals.

Therefore, the Fellowship, its committees and board will seek outside contractors in all instances where paid professional services are needed.

Contractors shall be approved by the Board or its designee.

All contractors are required to have insurance and shall provide a Certificate of Insurance prior to the beginning of work and/or the start of a contract. The following insurance standards shall apply:

- Commercial General Liability Insurance: Including Bodily Injury and Property Damage Liability
- Workers' Compensation: In accordance with California law, all Contractors shall carry Workers' Compensation Insurance. Sole proprietors may opt out of this requirement, except for roofing and other hazardous occupations. If a sole proprietor hires one or more employees, full- or part-time, the contractor shall carry Worker's Compensation Insurance.
- The Contractor shall require any subcontractor to provide evidence of Worker's Compensation and Employers' Liability Insurance, all in strict compliance with California State Laws.

In cases where it can be clearly demonstrated that it would be advantageous to hire from within the Fellowship for the completion of certain tasks, the Board may grant an exception. Petitions for such an exception shall contain the rationale for hiring from within the Fellowship and shall demonstrate financial benefit to the Fellowship and or unique qualifications or skills justifying the request.

For UUFSD building projects, the design and construction process shall adhere to the following guiding principles:

1. The Fellowship has limited resources to design, manage and execute building projects, and expecting Fellowship members to provide free professional services is not appropriate unless willingly volunteered and potential liability and other related issues are resolved.
2. It is in the Fellowship's interest to have design and construction work done that is well-detailed and well-executed so the work when complete will be durable, low maintenance, and aesthetically appropriate.
3. All building projects should have oversight by Dream Builders with written reports to the Board.
4. All building projects should be undertaken with a proper, pre-approved budget, and the budget should include professional and/or pre-construction services as/if needed.
5. All building projects should be awarded to, and constructed by a licensed general contractor. All contractors shall carry appropriate insurance as described above.

6. All building projects should be designed and constructed in accordance with applicable codes and regulations, and as permitted (when required) by jurisdictions having authority.
7. Not every project needs to be competitively bid, since by its definition, it requires more attention to detail and can add initial cost. Dream Builders and the Board have the option of using a default contractor for smaller projects. Dream Builders and the Board should evaluate each building project on its merits and determine the best project delivery method.
8. Founders Hall and Palmer Library are unique pieces of architecture and any design modifications should be carefully reviewed by Dream Builders and the UUFSD Design Review Committee and include the possibility of consulting with RWQA (Rob Wellington Quigley Architects) for design guidance along with associated costs.
9. All agreements for design, pre-construction, or construction services should be executed using acceptable contract forms that describe scope of work, scope of services, compensation, beginning and expected termination date of work, warranty terms of the work, exclusions and terms and conditions, and no services should be allowed to commence without a fully executed agreement. If possible, an attorney in the fellowship who is familiar with contract forms and practices should review the terms of the contract.
10. Dream Builders should appoint one Fellowship member to be the single point of contact to outside entities for each building project, and to oversee it from start to finish with responsibility for reviewing project details, administrating the contracts/agreements, and reporting to Dream Builders and the Board progress of work and any concerns.
11. Given that few Fellowship members have the experience (or inclination) to manage moderate to major design and construction projects, adherence to professional standards and practice will help to ensure successful outcomes.