

# Frequently Asked Questions

**1. Q: What is the process that brought us to this point?**

A: The Board of Trustees chartered the Future Facilities Task Force in September 2024. The Task Force members were Molly Watkins, Dawn Arrington, John Bacon, Ray Gonzalez, Tom McKenna, Kevin Ortner and Don Stimpert.

The Board contracted with the architectural and design firm Hiti, DiFrancesco and Seibold in January 2025. After a process of evaluation and the gaining of feedback from the congregation, conceptual designs that could form the basis for a re-imagined vision of the Shaker facility were created with cost estimates for various alternatives. Hiti held numerous meetings soliciting input from the congregation members, key committees, staff, external renters and other stakeholders from February through March 2025. These concepts were consolidated into specific conceptual designs and presented to the congregation in several meetings in June 2025. The congregation was asked and provided input rating their preferences of features and options that were presented. Following this the board adopted parameters for the capital campaign.

**2. Q: What are the next steps and timeline?**

A: **December 2025** (after we have finished the silent campaign and have a better idea of how much money we might realistically raise) - form a task force (yet to be named) to spearhead our congregation through the renovation process.

**January - February 2026** - Identify the architect and start creating architectural designs rather than conceptual designs; start identifying contractors, etc.

**March/April 2026** - have a congregational vote on final designs

**Summer or Fall of 2026** (depending on contractors) - start renovations.

**3. Q: What is a capital campaign?**

A: A capital campaign raises money over time for a special project. It is a process by which people unite to achieve a common goal and to accomplish something extraordinary. This type of campaign is conducted only when necessary in response to matters of significant need. It is above and beyond annual giving and often involves gifts of annuities, real estate, trusts, life insurance, securities or other assets, as well as regular income.

**4. Q: What is "Building Our Tomorrows"?**

A: This is the name and theme of our special, combined campaign that reaches out to every member and friend of UUCC to talk about their opportunity to give to the campaign.

**5. Q: What is the financial need of our campaign?**

A: \$6 million

6. Q: Who is being asked to support the Building Our Tomorrows campaign?

A: Everyone who is a part of the UUCC family. This includes current members and friends, as well as some former members and friends.

7. Q: Has a committee researched my financial capabilities?

A: No. That is confidential information which the committee doesn't have access to.

8. Q: Will the monies pledged to the Building Our Tomorrows campaign be used for anything other than the proposed plans?

A: No. Gifts to the Building Our Tomorrows campaign are restricted funds and therefore can only be utilized for proposed projects.

9. Q: Will the monies pledged to the Building Our Tomorrows campaign be kept separate from my other offerings?

A: Yes.

### **Adopted Resolution for the Board of Trustees**

#### **Regarding the Handling of Capital Campaign Restricted Funds**

**WHEREAS**, UUCC has undertaken a capital campaign (Building Our Tomorrows) to raise funds for repairs, renovation, and upgrades to the building as outlined in the campaign brochure/viewbook; and

**WHEREAS**, donors have made contributions with the understanding that their gifts will be used exclusively for the stated capital campaign purposes; and

**WHEREAS**, the Board of Trustees recognizes its fiduciary duty to ensure donor intent is honored and restricted funds are properly managed;

**NOW, THEREFORE, BE IT RESOLVED** that the Board of Trustees hereby establishes the following policies for capital campaign restricted funds:

1. **Segregation of Funds:** All capital campaign contributions shall be clearly identified and tracked separately in the UUCC's financial records as restricted funds. While these funds may be commingled with other organizational funds for cash management purposes, separate accounting records shall be maintained to ensure proper identification and tracking of all restricted contributions.
2. **Use of Funds:** Restricted funds shall be used solely for the purposes communicated in campaign materials. If Capital funds are commingled with other organizational funds, the commingled funds that are part of the Capital fund will not be used for other purposes, even for short-term purposes of expediency with the intent of replacement in

the near future. Although not anticipated, in extenuating circumstances, and with external legal advice, the congregation may vote to amend the purposes of the funds.

3. **Financial Oversight:** A Capital Fund Audit and Finance team will be named as a subgroup of the Finance Committee and approved by the Board of Trustees. It shall provide quarterly reports to the Board documenting receipts, expenditures, and remaining balances of capital campaign restricted funds.
4. **Accounting Standards:** UUCC shall comply with all applicable accounting standards (including GAAP and relevant FASB pronouncements) for the recognition and reporting of restricted contributions.
5. **Investment:** Pending use, these restricted funds may be invested only in savings and investment vehicles with zero or virtually zero risk to principal. As examples, this might include a savings account or money market fund offered by reputable organizations, or short-term Treasury Bills.

**RESOLVED FURTHER** that the Board Treasurer, Finance Chair, and/or designee are authorized to implement procedures necessary to carry out this resolution.

**Adopted by the Board of Trustees on:** December 2, 2025

**10. Q: Should we give less towards our annual giving to give to the Building Our Tomorrows campaign?**

A: No. We are counting on our current (and growing) giving levels to enable us to accomplish current ministry at current levels.

**11. Q: Is it necessary to have someone visit us?**

A: It is important that every member or friend receive a visit either in person or via Zoom. UUCC is your home and it is important that you understand the vision. This is better explained in person rather than via a brochure or letter and ensures that everyone has an opportunity to receive firsthand information and provide feedback.

**12. Q: How do we make a pledge?**

A: You will be visited by a fellow congregant who has volunteered to help with the campaign. They will explain the plans for the campaign in more detail and will give you an opportunity to ask questions so that you fully understand UUCC's mission. They will ask you to make an annual pledge and will suggest a specific gift to the Building Our Tomorrows campaign for you to take into consideration.

**13. Q: Can pledges be given in assets other than cash?**

A: Yes. Giving appreciated financial assets (stocks, bonds, trusts, life insurance, annuities, etc.) and appreciated real estate are especially beneficial, because the donor

may enjoy certain tax advantages, particularly when given directly to the congregation for sale by the congregation. The charitable deduction value of a gift of appreciated assets is the asset's value at the time of the transfer to the congregation. Gifts of real estate should have clear titles and require an assessment by the congregation before the gift is accepted.

**14. Q: How much time do I have to fulfill my campaign pledge?**

A: We are suggesting that you consider a pledge that can be fulfilled over a period of 3 years or less. The earlier you can begin paying the pledge, the better it will be for UUCC. You can determine the installment plan that works best for you and your family.

**15. Q: Do pledges to the campaign have tax advantages?**

A: Yes. All contributions made to UUCC are tax deductible, however it is always important to consult your tax accountant or financial planner for details on your specific situation.

**16. Q: When will we need to make a pledge?**

A: Since the campaign is scheduled for a limited number of weeks, it is important that pledges be made as quickly as possible after you have been visited. Take all the time you need, but please hurry! Most people find they can make this decision within one week.

**17. Q: When would we begin making payments towards our pledge?**

A: Campaign payments may begin immediately after you make a pledge or at a time more comfortable for you. We only ask that you pledge what you believe you can fulfill over the three-year pledging period. The earlier you begin, however, the better it will be for UUCC.

**18. Q: Is it necessary to sign a pledge form?**

A: Yes. A signed pledge form is important to confirm our pledges, to finalize plans for the beginning work, and to be able to project our anticipated cash flow. Pledges are not viewed by UUCC as legally binding, but rather as a statement of your best intentions.

**19. Q: Who will know how much we pledged?**

A: The information is given in confidence to only those who process, record and track pledges and offerings. These individuals have been trained on maintaining confidentiality. Essentially, your pledge is confidential.

**20. Q: Why are members and friends being asked to consider a specific gift size for the Building Our Tomorrows campaign?**

A: It is one thing to be supportive of a project. It is quite another to be supportive at a level that will actually make the vision become a reality. Since no one person is going to give the entire amount, we believe it is both transparent and honest to share with each person what it's going to take — from each of us — to transform that vision into a reality. The need is very large; therefore, inspirational gifts will be required in every dollar

category in order to reach that goal. Informing everyone of how their individual participation **may** fit into the “big picture” identifies a level of giving that can guide each person in determining their own participation.

**21. Q: How were the campaign Building Our Tomorrows “asking” amounts determined?**

A: Successful campaigns are built around a scale of different sized gifts based on the previous experience our director has had with other congregations like us. If UUCC is to reach its goal, a certain number of gifts will be required at every level (from \$1000 to \$500,000 and more). A group of trained volunteers who have already made their pledges have suggested families within the congregation who may be able to reach giving levels similar to their own. That information, as well as a family’s previously demonstrated commitment to UUCC, help form a partial picture. Everyone is being asked to consider a specific level of giving that will be both challenging and inspirational — and will help UUCC reach its goal. In the end, however, each family must consider for themselves what their gift will be. Whatever you decide to do is the right thing.

**22. Q: How will we know how much to pledge?**

A: While each of us will be asked to give generously, only you know what amount to give or how to structure your commitment over the three-year pledging period. We can’t all give at the same level. Some have more or less than others. You will discover that thinking through your pledge will allow you to begin a process of personal discovery to determine your own level of generous giving.

**23. Q: Is it better to be “cautious” or “optimistic” when making my pledge?**

A: The campaign committee’s advice is to be “reasonably optimistic” regarding your pledge. The record of your pledge is not a legal document, but a statement of your best intentions. UUCC will try to make reasonable plans for the future based on the total amount pledged. In this case, being overly cautious could be just as much of a challenge to the planning process as being overly optimistic. To help UUCC’s planning process, our advice is to be ***reasonably optimistic***. If you think that “We’ll probably be giving more,” then it would be helpful to indicate that amount on the pledge form now, rather than later.

**24. Q: I have a lot going on right now. Do I really need to make a pledge now?**

A: Our lives are very challenging. Each donor will need to make a decision that is best for them and their family. We only ask that you also consider the best interest of the UUCC family in your decision as well. Pledging during this campaign is important for UUCC’s future. Submitting a pledge is a quick and easy process which provides UUCC with a *forecast* of your payment plans.

**25. Q: Who is in charge of the Building Our Tomorrows campaign?**

A: A steering committee for the campaign was created to ensure we run an effective effort. It is made up of members of UUCC and is led by our campaign director Glenn Wagner, and is accountable to the campaign co-chairs, David Kantor and Laurie Albright,



Rev Randy Partain and the Board. This steering committee is responsible for the fundraising.

**26. Q: How many people need to participate in order for this to be successful?**

A: Our hope is 100% participation. It will take all of us, working together, to reach the goal.

**27. Q: Can we really raise this much money?**

A: The experience of our campaign director, UUCC's enthusiasm for the vision and needs would suggest that meeting the need will be challenging, but possible. It will, however, require acts of significant and inspirational giving by our members. Those families with above-average ability to give will be instrumental in setting the stage for reaching and perhaps surpassing our campaign need. The success of an appeal will require inspirational financial support from all members of the congregation. We are using a proven methodology to engage every member and friend of UUCC in the vision for and support of the goals of the campaign.

We are delighted to have a highly experienced campaign director, Glenn Wagner, who is working in close partnership with the Campaign Steering Committee to achieve best results. Glenn has temporarily moved to Shaker Heights and is working full-time on-site in the congregation offices, embedded as an extension of the UUCC staff. Much will depend on how each one of us responds to this vision and need.

**28. Q: How can I make sure the monies I give go to the Building Our Tomorrows campaign?**

A: Write your check out to "UUCC" and put "**Building Our Tomorrows**" on the memo line of your check.