

# WEST SHORE PROJECT/INITIATIVE ADOPTION POLICY

## BACKGROUND

In cases where a Church group desires that their project or initiative be paid for by the congregation at large, Staff and Board leadership need a fair and balanced way to evaluate the proposal and choose whether or not to approve it, and under what conditions.

## SCOPE

Proposals that would require use of this policy include:

1. All new or existing projects/initiatives that require funding through the operating budget;
2. All initiatives that had previously been covered by special fundraisers and are now proposed to be covered by the annual operating budget;
3. All expenses tied to membership or dues payments to organizations. (This does not include our annual Fair Share gift to the UUA.)

This policy goes into effect July 1, 2022.

## PROCESS

### Making a case

*If the project/initiative in question is new*, its sponsors will need to make a case for its approval. The case must include the following, in writing: A clear description of the new initiative which outlines (1) its purpose, (2) how it supports the church's mission and our UU Principles, (3) all related costs and whether they are multi-year in scope, and (4) any increased duties by paid staff as a result of approving the initiative.

This written case is presented to the Finance Manager by December 15.

The Finance Manager forwards the written case to the Finance Committee, which will evaluate it at its January meeting. It will then prepare a recommendation to the Board, with the following considerations in mind:

- Whether the initiative's/project's purpose is appropriate for this church
- The degree it supports the church's mission and our UU Principles
- Whether related costs are reasonable
- Whether there will be sufficient projected income to cover it, on top of regular commitments
- Whether any increased duties by paid staff (if the proposal goes through) are justified

The Finance Manager may invite supporters of the initiative to speak directly to the Finance Committee, to provide additional details.

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If the project/initiative in question is not new but is now being evaluated under this policy, its sponsors will need to make a case for renewed approval. The case must include the parts listed above, with the addition of a historical overview and a description of the benefits that West Shore experienced because of its prior support.

Either instance of making a case must be timed in accordance with the larger budget formation process that, on an annual basis, commences in February and concludes in May. Initiative proposals that aren't in sync with this timing must be placed on hold until the next round of budget formation.

### **The Board's Role**

The Finance Committee forwards to the Board its recommendation to approve or decline each request for consideration at the January Board meeting.

The Board may do the following:

- Accept the Finance Committee's recommendation
- Deny the Finance Committee's recommendation
- Modify the Finance Committee's recommendation

The Board is responsible for reaching out to the requesting group in a timely fashion regarding proposals that, ultimately, were denied. Considerations include

- Whether the initiative's/project's purpose is appropriate for this church
- The degree to which it supports the church's mission and our UU Principles
- Whether related costs are reasonable
- Whether there will be sufficient projected income to cover it, on top of regular commitments
- Whether any increased duties by paid staff are justified

### **The Stewardship Team's Role**

The Finance Manager will communicate all Board-approved requests to the Stewardship Team, which is charged with sharing this news with the congregation at large, to the end of money transparency.

The Stewardship Team is responsible for advocating the initiative and ensuring that the needed funds are raised.

The costs will be incorporated into the budget draft for the upcoming fiscal year.

The Finance Manager may invite supporters of the initiative to speak directly to the Stewardship Team, to provide additional details.

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## Revision History

Section	Description of Revision	Date of Approval of Revision	Approver
Entire policy	New Policy	3/24/2022	WSUUC Board of Trustees

## WEST SHORE PROJECT/INITIATIVE ADOPTION POLICY

The following template should be used to submit requests to approve the use of WSUUC operating budget funds for a congregation-wide project or initiative. Please submit your completed template to Suehana Kieres, Finance Manager, by December 15 to be considered for the operating budget that is in effect July 1 of the following year :

*Project/Initiative Sponsor:*\_\_\_\_\_

*Contact Information: email/ phone*\_\_\_\_\_ *Date of Submission:*\_\_\_\_\_

### ***New Request or Renewal (select one)***

***Please provide:***

*Description of the project/ initiative:*

*Expected outcomes, including any specific measurable goals. If this is a request to renew funding for an existing project/initiative in the operating budget, please provide a summary of the actual outcomes experienced in the prior year:*

*Description of the expected benefit to the congregation as a whole, including how the project/initiative supports the WSUUC mission and the UU Principles:*

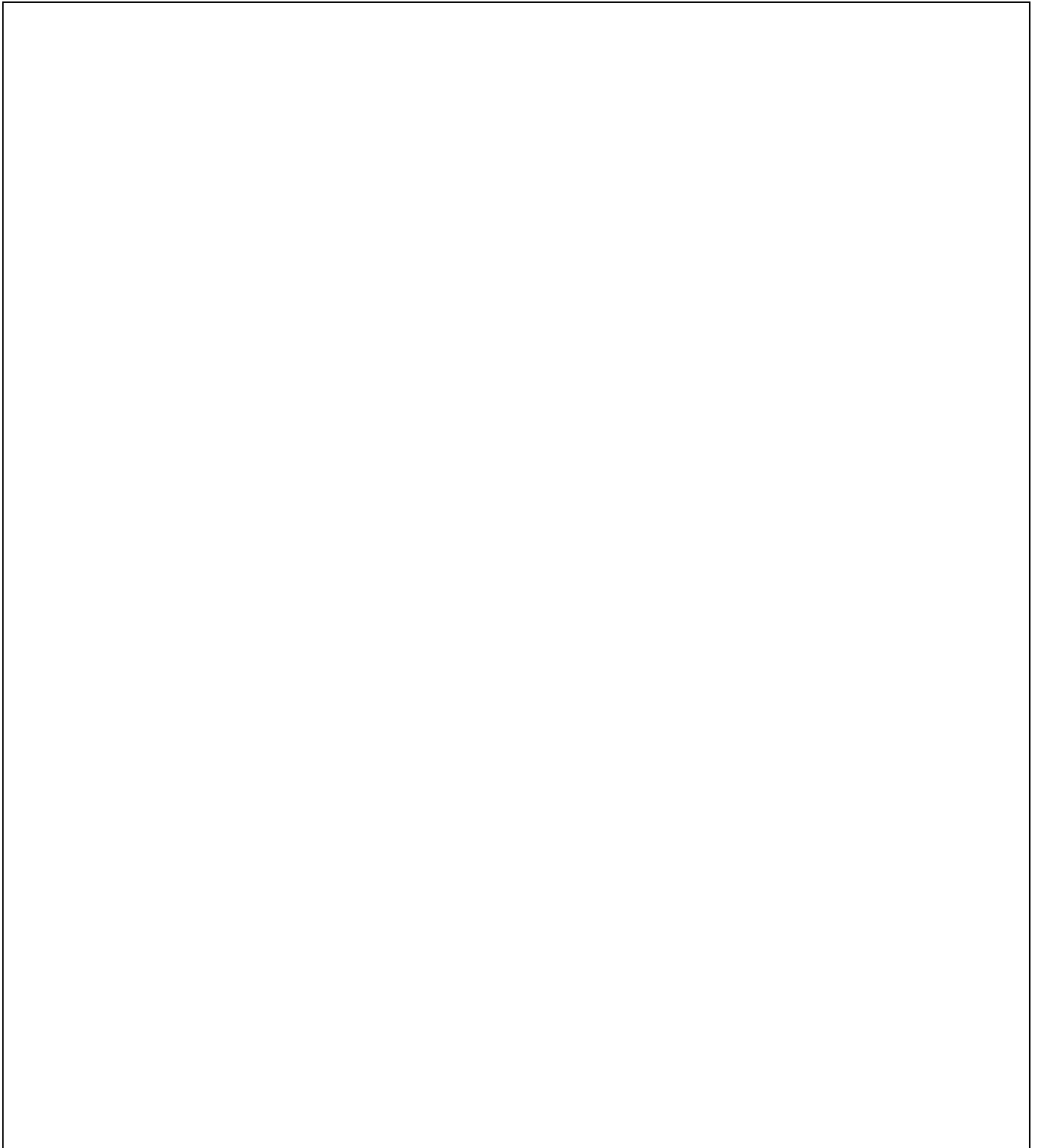
*Description of WSUUC staff resources needed for this project/initiative:*

*Expected expenses related to this project/initiative. Include any travel, equipment, materials, fees, etc.*

<u><i>Expense</i></u>	<u><i>Amount</i></u>

*Expected length of the project /initiative, including any relevant start date and target completion date:*

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**The following is an EXAMPLE of a complete template:**

## WEST SHORE PROJECT/INITIATIVE ADOPTION POLICY

*Project/Initiative Sponsor: Joe Schafer*

*Contact Information: email/ phone 440-XXX-XXXX Date of Submission: 7-2-22*

### **New Request or Renewal (select one)**

#### **Please provide:**

##### Description of the project/ initiative:

This request is for Church operating funds to pay for an annual membership for WSUUC in Greater Cleveland Congregations.

##### Expected outcomes, including any specific measurable goals. If this is a request to renew funding for an existing project/initiative in the operating budget, please provide a summary of the actual outcomes experienced in the prior year:

West Shore is a founding member of Greater Cleveland Congregations. GCC follows the community organizing strategies of the Industrial Areas Foundation. It includes over 30 dues-paying congregations and organizations from across Cuyahoga County. It is Christian, Jewish, Muslim, and secular. We are one of three Cuyahoga County UU congregations who are active GCC members.

Our West Shore GCC Core Team supports GCC in connecting individuals and organizations to multiply its power and mobilize its members by the thousands to make our voices heard to build a better community for all county residents. A GCC staff of four paid organizers supports clergy, lay leaders, and member institutions to carry out its mission of being a catalyst for social justice.

A highlight of our GCC work in the fall of 2021 involved our team generating substantial West Shore representation at a virtual “action” event on October 7. It featured the two Cleveland mayoral candidates. The large turnout from its member organizations served to strengthen GCC’s presence as a force for positive change, and generated commitments from these candidates on the following issues:

- A Crisis Diversion Center to decriminalize mental health emergencies had recently been created through GCC’s efforts. This new center was effectively being used by county organizations such as RTA law enforcement, but the then current Cleveland administration was preventing the use of this facility by Cleveland police. GCC gained a commitment that the city would make use of this facility.
- Cleveland was one of the few major Ohio cities that had not joined a Gun Safety Consortium to push gun manufacturers for safer gun products in order to prevent childhood accidents, gun thefts, and suicide. GCC gained a commitment to join this consortium.
- Members of our Core Team had been active participants in conducting canvassing in five key Cleveland neighborhoods to identify the causes, in addition to voter suppression, for voters not participating in recent elections. Residents were discouraged when things like potholes and houses marked for demolition did not get addressed. GCC gained a commitment to meet with GCC leaders within 100 days of the election to negotiate and strategize on the specifics emerging from this canvassing effort.

The eventual winning candidate, Justin Bibb, met each of these commitments.

Our Core Team generated the participation of 23 West Shore members in a GCC “action” on April 7. This event involved hearing from the three candidates for Cuyahoga County Executive and four of the five candidates for a contested Juvenile Court judge position. A major focus of GCC regarding the County Executive was concern arising from the GCC neighborhood canvassing about availability of senior housing. GCC’s major concern regarding the open juvenile judge position was the practice of “bindover,” where some juveniles, disproportionately those of color, are turned over to be tried, and generally incarcerated, as adults.

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Description of the expected benefit to the congregation as a whole, including how the project/initiative supports the WSUUC mission and the UU Principles:

Membership in GCC supports our mission and principles by providing opportunities for our congregants to learn about issues of structural oppression in our community and to provide peaceful and effective ways to promote justice through collective effort with justice seeking congregations of all faiths in Cuyahoga County.

Description of WSUUC staff resources needed for this project/initiative:

In addition to the direct involvement of our Senior Minister in GCC work, the only staff resources needed are providing the room and Zoom arrangements for GCC Core Team meetings.

Expected expenses related to this project/initiative. Include any travel, equipment, materials, fees, etc.

<u>Expense</u>	<u>Amount</u>
Annual membership fee	\$4,000

Expected length of the project /initiative, including any relevant start date and target completion date: Ongoing.