

Annual Report

2016-2017



First Unitarian Church



Living Our Liberal Faith Since 1866

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ANNUAL REPORT 2016-2017

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First Unitarian Church's Mission and Elements

The mission of First Unitarian Church of Portland, Oregon is to create a welcoming community of diverse individuals; to promote love, reason and freedom in religion; to foster lifelong spiritual growth; and to act for social justice.

To realize this mission, First Unitarian Church:

1. Is a welcoming and loving community that provides a safe haven where a diverse people of various ages and cultures may gather to build nurturing relationships.
2. Offers lifespan religious education consistent with Unitarian Universalist values, and provides a forum for exploring diverse points of view.
3. Provides worship that is inspiring and affirming, as well as a variety of experiences that invite congregants to deepen their spiritual lives.
4. Uses transparent democratic processes that maintain shared governance and ensure that all voices are heard and respected, and that clearly define the roles and responsibilities of congregants, the Board, staff, and ministers.
5. Cultivates and nurtures leaders who serve and inspire the church community.
6. Is a sustainable church community in which congregants, Board, staff and ministers share stewardship of both our tangible and our human resources.
7. Takes a leadership role in the larger Unitarian Universalist movement, maintaining connections with other Unitarian Universalist congregations and institutions as well as the local interfaith community.
8. Witnesses as a voice of conscience in our community and beyond, collaborating with other justice-seeking institutions, encouraging congregants to join others in building a more equitable, sustainable, and peaceful future for all.



Our Vision:

First Unitarian Church is a beacon of hope for us and for our community, a spiritual center in the heart of our city that helps each of us to find our moral compass, calling and challenging us to build the beloved community with an ever deepening sense of spirit, diversity and inclusion.

Moderators' Message

2016- 2017 Church Year

The Board of Trustees established one overall goal for the 2016-2017 church year: increase linkage between the board, the congregation and the executive team. Each committee had specific pieces of this goal.

1. *Finance – Increase accessibility of church financial information, and increase engagement with the Foundation*
2. *Communications – Increase frequency and develop new means of communicating board information and actions to the congregation.*
3. *Governance – Develop draft revisions to current governing policies and present to full board for review and input. Provide opportunities for congregant review and input.*

The 2016-17 church year proved tumultuous. Staff departures, changes to our sanctuary, a national election which had significant impact in many ways, and a challenging Annual Fund Drive all served to emphasize the relevance of the board goals.

Our communications committee began publishing a monthly moderator letter, developed an FAQ on the church website, and held three congregant forums which provided much needed opportunities for congregants to ask questions and express their opinions about church changes.

Reverend Sinkford held the first of his congregant Q&A sessions, which have continued into the new church year. Our finance committee held three quarterly finance updates for interested congregants, provided several opportunities for congregants to review the proposed church budget prior to our congregational vote, and took a more active role with the Church Foundation inviting foundation members to attend and speak at a board meeting. This also included discussion of innovative proposals around the reduction of our church debt on the Buchan building.

The Governance Committee worked diligently and produced several drafts of our church governing policies. We anticipate that building on their good work we can bring this process to completion this fall. Last year was eventful and ultimately productive. We start the new year with high hopes.

In faith,

Board Moderator

Randy Russell, 2016-2017

Executive Team Report – Fiscal 2017

August 23, 2017

Annual Executive Team “Monitoring Report”

We have included an updated version of the May letter from Bill and Randy that accompanied the ballot mailing, as our transmittal memo for this report, to remind us all of the major events that shaped the past church year.

A Year of Change: First Unitarian 2016-2017

The extent of change at First Unitarian during this past year has tested all of us. Yet the need for our church has never been more pressing. The challenges of that dual reality shape this report and our planning as we move forward.

The signs of change have been unavoidable: New screens in the sanctuary, DeReau Farrar as now permanent Music Director, Kate Lore’s decision to resign. Issues around decision-making and transparency seemed to amplify the inevitable stress of change. New opportunities for leaders to listen were created in response. But trust has been tested.

In the midst of this change, the national election took place with results that shocked and mobilized many of us. Our sanctuary filled to capacity and beyond in the weeks that followed. Attendance grew by 20% during November and December, and has remained 10% above in the early months of 2017.

Numbers of new members have increased. New energy in our justice work, most clearly seen in the area of immigration justice, helped us find ways to respond. Our virtual ministry continued to expand with streaming attendance at worship growing faster than in-person attendance. Our role as convener and partner with other progressive groups has filled our campus.

Both the stress of change and the good ministry we have done together are part of the story of this past year at First Unitarian.

The shortfall in the Annual Fund Drive (AFD) is also part of that story. The results were 10% below our goal and 7% below the pledges of last year. Some congregants, though only a few, let us know that they were reducing their pledges because of some of the changes. More told us about life changes (retirements, moves, illness). In the aftermath of the election, more of us gave more to the ACLU and Planned Parenthood. We are reaching out to those who reduced their pledges or did not pledge this year to ask them to tell us why.

Despite the AFD shortfall, the budget we are presenting has to be in balance. It calls for reserve funds to be used to partially cushion the shortfall. But expenses still need to be significantly reduced. Our tight management of recent years means that little other than staffing is available to trim. These reductions are reflected as an \$86,000 item, in total, which we will specify in the early months of the new church year.

As this year draws to a close, with more opportunities for congregant input in place and the need for our liberal religious community so clear, there is reason for optimism. First Unitarian has been a beacon of hope in this

community for more than 150 years. Our challenge is to keep that beacon burning brightly through the changes and the challenges of our day.

We are both grateful for the opportunity to serve.

Board Moderator Randy Russell and Rev. Bill Sinkford

One note before the report itself: We have included scores from the Congregational Survey as usual. In the past we have given these scores significant weight as relatively objective measures to track changes in congregant satisfaction. Please note that this year just over 100 congregants completed this survey, the smallest number by far since we began this practice. Ratings for all Elements were reduced. How to understand these ratings is the question. The shortfall in the Annual Fund Drive and the congregant dissatisfaction fielded by the Board and E.T. support a narrative of distress and decline. However, on most of the objective metrics for congregational health (attendance, membership, RE enrollment, participation in SJ events) the picture is of a very healthy and growing congregational system. We draw no conclusion but note that with a sample size this small, the responses of just a few congregants can have impact significantly greater than their numbers.

With that as preamble, we submit this report. We continue to be grateful for the opportunity to serve.

--

Bill Sinkford
Tom Disrud
Kathryn Estey

Mission. The mission of First Unitarian Church of Portland, Oregon is to create a welcoming community of diverse individuals; to promote love, reason and freedom in religion; to foster lifelong spiritual growth; and to act for social justice. To realize this mission, First Unitarian Church:

1) People who participate in the church community feel safe, experience nurturing relationships and diversity, and are challenged to grow spiritually.

E.T. Interpretation: We interpret this element to mean that the church, through its worship life, programs, institutional goals and policies, models radical hospitality to welcome the diversity of people who come through its doors and offer them opportunities to grow spiritually once they are here. It will strive to support people on their life journey through pastoral care and through one-on-one and group interactions. It will strive to build the Beloved Community through a variety of group experiences and will be intentional in its work to be anti-racist and multi-cultural. It will establish policies to insure that the church is a safe place for everyone, and particularly those who are the most vulnerable.

E.T. Assessment: We believe we are in reasonable compliance with this aspirational Element of our Mission.

Measures/Indicators:

This Element received a rating of 3.68 (5-point scale), down 7% from the prior year. Given the small sample size, this difference does not exceed the margin of error.

2017	2016	2015	2014	2013	2012
3.68	3.98	3.92	4.11	4.18	3.93

See “Worship” Element for data on attendance.

The number of new members in 2017 was higher than average. Many joined in the months leading up to the election and in the months following.

New Members Annual Enrollment

FY 2017	FY 2016	FY 2015	FY 2014	FY 2012	FY 2011	FY 2010	FY 2009	FY 2008	FY 2007	FY 2006	FY 2005
80	56	84	78	69	67	41	46	70	75	53	78

Membership Process: This year we combined the two introductory classes, Intro to Unitarian Universalism and Path to Membership, into one class called Path to Engagement. We also moved most of the classes to Sunday morning. The main goal was to offer more opportunities for people to learn about the church. In the coming year we hope to begin a more comprehensive series of classes for newcomers based on a model out of the Dallas church called Faith Forward.

Pastoral Support:

Pastoral care is provided to congregants by all First Unitarian ministers and an active team of lay ministers. In FY2017, lay ministers supported 113 congregants through meetings, phone calls, and e-mail – the largest

number of congregants served except for FY2016. There is a new emphasis in our lay ministry program, with fewer congregant-to-congregant interactions and a shift towards group support efforts.

Lay Ministry Support to Congregants

	FY2017 2nd Half	FY2017 1st Half	FY2016 2nd Half	FY2016 1st Half	FY2015 2nd Half	FY2015 1st Half	FY2014 2nd Half	FY2014 1st Half	FY2013 2nd Half	FY2013 1st Half
# of Congregants Served	69	44	114	44	58	38	48	30	48	38
# of Meetings /Calls	267	199	313	274	289	187	404	337	315	378

Congregational Diversity:

The sample size in this year’s survey is too small to draw conclusions about demographic changes in congregational composition. We believe these comments from last year continue to apply:

Demographics from the Congregational Survey reveal an aging congregation: 84% of respondents are 50 or older, 70% over 60. Changes in the age categories used from year to year make exact comparisons difficult, but from 2013 to 2016 the proportion of congregants over 70 grew from 19% to 30%.

The survey results strongly suggest that a focus on age cohort under 50 is called for. For example, we currently offer minimal tailored support for young adults. Our hope is that the Congregational Life Initiative will include new imagination and staff energy for this ministry.

The survey also continues to describe a congregation that is overwhelmingly white, though the percentage of adults who identify as other than white is “drifting” upward, now near 10%. The numerical change is modest but seems real. There are now, consistently, a few more darker faces in the sanctuary on Sunday mornings. “Black Lives Matter” continues to be a central element of our internal reflection, public witness and outreach. Our banner has been mentioned with approval by more than one person of color who now regularly attends worship. (It should be noted that we are not immune to the recent national resurgence of white supremacy protest. Calls from non-members about our Black Lives Matter banner have spiked up since the Charlottesville violence. Our internal training and awareness programs have shifted to a focus on white privilege and the culture of white supremacy.)

“Safety” Policies:

Policies are in place that articulate the vision of First Unitarian as a safe place for a diverse community (Congregational Covenant, Grievance Procedures, Safe Congregation).

2) Participants in lifelong religious education explore diverse points of view and gain a deeper understanding of themselves.

Interpretation: First Unitarian offers opportunities, across the lifespan, for learning and understanding grounded

in UU values. We also provide forums for exploring difficult contemporary religious issues.

E.T. Assessment: We are in compliance with this Element, as written. We continue to believe that this Element should be revised to focus more on outcomes than on what we offer.

Measures/Indicators:

In the Congregational Survey, this element received one of the highest ratings (4.04), and is only marginally lower than ratings in past years.

2017	2016	2015	2014	2013	2012
4.04	4.18	4.26	4.43	4.54	4.48

The range of programming offered is reflected in both the Learning Community and Adult Education Program Guides.

Learning Community for Children and Youth

Learning Community Registration ... September-June 2009-2016

	2016-17	2015-16	2014-15	2013-14	2012-13	2011-12	2010-11	2009-10
Children					*	390	404	362
Youth					*	105	120	132
Total	451	424	465	475	490	495	524	494

*Beginning in 2012 the Learning Community discontinued the breakout of children and youth, instead measuring total registrations.

Comment from Cathy Cartwright Chow: Registration is definitely up and the highest it's been in 3 years. We have given families in their second year of participation plenty of notice as to the expected pledge (first-year families are not expected to pledge). Average attendance holds steady at 51% of registration. In fact this percentage has changed very little over the years.

NOTE: In 2012 we adjusted programming for youth from a program that separated out 7th grade, combined 8th/9th and had 10th, 11th and 12th grades in YRUU, to the current program that combines 7th/8th and moved 9th graders into YRUU. Our registration numbers have increased in both of these groups maintaining numbers as children grow into the older grades.

Over the school year we had 306 children/youth visit, with 62 of those registering.

Adult Programs Registration:

Total Registrations (Classes & Retreats)	2016-17	2015-16	2014-15	2013-14	2012-13	2011-12	2010-11	2009-10
	947	1,108	1,027	998	1,001	1,315	984	1,157

Comment from Katie Radditz: Adult Programs held 65 classes, 9 retreats, and 8 special events. Our focus in Adult Programming this year has been on our personal stories of spiritual awakening, suffering and

transformation. The resulting effects of participation were to make deeper connections between people, to strengthen commitment to First Unitarian and to become involved in positive action. Adult Programs once again offered justice-centered classes as we did six years ago; a few were offered in collaboration with Social Justice groups and with other non-profit organizations. The weather was a great challenge for several months causing class and retreat cancellations and/or postponements, thus the lower numbers in actual participation.

Katie's retirement at the end of the last church year is another major staff transition and has opened a conversation about our entire "education" program over the lifespan. That reflection will continue through this year, as will decision-making about staffing needs and structure. Mary Gear, a former intern and candidate for ministry, has been hired in an "Acting" role to continue the already well-planned Adult Programs for the fall and take part in the important reflections as we plan for moving forward.

3) Original: Provides worship that is inspiring and affirming, as well as a variety of experiences that invite congregants to deepen their spiritual lives.

Revised: Participation in Sunday worship is inspiring and affirming, and deepens the spiritual lives of the participants.

E.T. Interpretation: First Unitarian offers excellent quality worship that not only nurtures/affirms, but also inspires/challenges congregants to spiritual depth.

E.T. Assessment: We believe we are in compliance.

Measures/Indicators:

In the Congregational Survey the rating for "Provides worship that is inspiring and affirming" dropped approximately 9% to 3.83.

2017	2016	2015	2014	2013	2012
3.83	4.28	4.26	4.39	4.53	4.47

Sunday worship attendance remains the most important numerical indicator of congregational vitality, although as church-going culture continues to shift it is no longer the sole indicator.

The gradual reduction in attendance which we have noted with concern in recent years was reversed this year. Overall Sunday attendance grew by 9%. Corrected for the 1 ½ Sundays we lost due to January ice storms, the growth was 12% over year ago. Attendance did not quite reach the level of Rev. Sinkford's first year, but was larger than any year since.

We did experience a "Trump Bump" in the fall, with attendance up 10% vs. a year ago during the July-December period. But the growth in attendance actually accelerated (to 13%) in the Feb-June period, when the Trump Bump is reported to have dissipated in most congregations.

Concerns that the transition to a new Director of Music might impact either the quality of music and/or the overall quality of worship have not come to pass. Energy in the music program remains high and all anecdotal evidence indicates that DeReau Farrar's leadership is welcomed and enjoyed.

With changes in our music directors came changes in our record-keeping. The most recent numbers reported in this chart reflect registrations for the new church year, with registrations for 2016-2017 not available. We note that the numbers are down, and offer several possible factors – alone or in combination – for this:

- Change in music program leadership;
- Two years into a new policy connecting choir fees and pledging;
- New director’s decision at the end of last year towards stricter enforcement of the attendance policy.

Music Program Registration

	<i>2017-2018</i>	<i>2015-2016</i>	<i>2014-2015</i>	<i>2013-2014</i>	<i>2012-2013</i>	<i>2011-12</i>
Chamber Choir	38	49	46	43	40	38
Unitarian Choir	60	75	85	80	80	80
Chalice Choir	63	80	82	80	83	75
UU Women’s Choir	27	22	30	30	29	28
Bell Choirs	57	75	72	65	65	60
Totals	245	301	315	298	297	281

Long-time Director of our Bell Choirs, Ellie Hodder recently resigned to take a full-time music director position. The search for a new leader for the bell program has just been successfully concluded in the hiring of Zeke Fetrow.

Virtual attendance continues to grow dramatically, now regularly 13% of total. During January’s winter weather, Live Stream attendance topped 20% of total. In an increasingly virtual world, this has to be seen as a strength of our evolving ministry, though its long-term impact for our community is yet to be clearly seen.

We continue to believe that the nature of church attendance is shifting/has shifted to a lower frequency of in person attendance.

Perhaps positive attendance results in the spring were made possible by the work of the Board and E.T. to address the conflicts and stresses within the community.

Perhaps the many people who needed church and sought us out this year because of the election results were impressed by the quality of our ministry and became regular attendees. Our membership numbers support that theory.

Perhaps those who dislike our screens expressed their displeasure in the ratings of this Element.

Perhaps the passage of time and our overall excellent ministry overcame the stress of change that dominated the fall. Perhaps a relatively small number of congregants unhappy with our ministry had an outsized impact on the numerical scores.

This year, there are simply too many variables at work for a confident, single explanation.

The positive attendance results are cause for cautious optimism.

Sunday Attendance

	2017	vs. 2016	2016	2015	2014	2013	2012	2011	2010
Sanctuary	33,103	+3%	32,335	34,728	36,345	37,981	38,955	42,129	38,024
Streaming	5,120	+88%	2,725	1,708					
Total	38,233	+9%	35,060	36,436	36,345	37,981	38,955	42,129	38,024
#Sundays	51		52	52	51	52	52	52	52
Av/Sun	749		674	701	712	730	749	810	731
Christmas	2,201		2,230	2,201	2,035	2,025	1,864	2,163	1,670
Total	40,424	+8%	37,290	38,637	38,380	40,006	40,819	44,292	39,694

These attendance figures are for the 12 months of each fiscal year (July-June).

It should be noted that January ice storms closed church one Sunday and reduced attendance by 50% another. Overall Sunday attendance therefore is more accurately expressed as +12% in total, +6% in our Sanctuary.

4) Transparent Democratic Process

Original: Uses transparent democratic processes to maintain shared governance and ensure that all voices are heard and respected, and that clearly define the roles and responsibilities of congregants, the Board, Staff and Ministers.

Revised: Employing the principles of policy-based governance and the Unitarian Universalist Association, ensures that all voices are heard and respected.

Revised Interpretation: Responsibilities and authority of ET, Board, Staff and Ministers, within the governance system, are clearly delineated and understood by interested and concerned parties. Efforts to make information available are on-going. Multiple ways to have concerns heard by decision-makers are provided and promoted. ET, ministers and staff all function with robust accountabilities to lay program and support committees in virtually every ministry area.

E.T. Assessment: Much good work, including a consultation with UUA staff in the spring of last year, began moving Board leadership and E.T. toward renewed clarity. Work remains to be done, however, and we are still far from full compliance with this policy language.

The Board has initiated a process of simplifying and revising our approach to governance by policy. Knowledge about these changes has not been widely shared. A relatively small number of congregants care intensely about transparency and congregant involvement in decision-making. Discussion and input on new policy language, and agreement on this approach, will be part of our leadership work in this coming year.

Measures/Indicators:

The rating for this element was down considerably (-15%), likely a result of a number of issues that congregants were unhappy about this year. The Board and E.T. responded with a concerted effort to be engaged with congregants and to offer chances for input in decision making. Next year more opportunities for input are already planned.

2017	2016	2015	2014	2013	2012
2.79	3.31	3.42	3.87	3.82	3.58

5) Ensures the continuity of leadership in the church by developing, supporting, and providing a meaningful experience for a succession of new leaders.

Interpretation: First Unitarian provides a variety of easily accessible pathways for congregants to deepen their spiritual lives through leadership service to the church and supports those who offer leadership in the wider community.

E.T. Assessment: First Unitarian continues to be an institution in and through which individuals demonstrate leadership in a variety of ways. Given other ministry priorities, our hope was to locate more formal but modest leadership development and support through the Nom Com. Energy for this work in the Nom Com has flagged. Their priority has had to remain identification of candidates to fill Board and Nom Com positions. Leadership Development remains important but we have yet to find a sustainable support structure for it.

Measures/Indicators:

2017	2016	2015	2014	2013	2012
3.27	3.71	3.64	3.92	3.82	3.58

6) Is a sustainable church community in which congregants, Board, staff and ministers share stewardship of both our tangible and human resources.

E.T. Interpretation: First Unitarian is supported, financially, by congregants at a level that sustains our existing, multi-faceted ministry, and allows the church to build toward a vibrant future. Monitoring of our financial health is shared among Board, ministers, staff, and lay leaders. Annual fund-raising is the responsibility of E.T. and staff with the critical support and collaboration of lay leaders/volunteers.

Measure:

Congregant ratings for this Element of our mission were down 15% below the prior year.

2017	2016	2015	2014	2013	2012
3.06	3.60	3.42	4.05	4.32	4.10

Annual Fund Drive 2017

Our pledges for calendar year 2017 fell 8% short of our \$1,545,000 goal – totaling \$1,424,000 as of July 31. Each year, some congregants reduce or even end their pledges due to changed personal circumstances (job loss, moving out of the area, divorce, etc.) The majority of individuals and families who reduced their pledges whom we were able to contact reported a change in personal circumstance as the reason. New member pledges and "returning pledges" from individuals and families who "take a year or two off" typically balance these reductions. There were more reductions than additions this year.

In addition, special factors contributed to this year’s shortfall:

- dissatisfaction with decisions/developments (sanctuary screens, Kate Lore’s departure in the middle of the AFD), magnified by a small group of congregants who actively encouraged people to substantially reduce their pledges;
- national election results, which influenced congregants to give more of their charitable dollars to other groups such as the ACLU and Planned Parenthood. (The ACLU reported its normal contribution income of \$5 million grew to \$83 million last year.)

Calendar Year Pledges as of 07/31/XX	2017	2016	2015	2014	2013	2012	2011
AFD Pledge \$\$ (000's)	\$1,424	\$1,500	\$1,410	\$1,362	\$1,312	\$1,342	\$1,328
Special "Ask"			\$115			*	
Total \$\$ (000's)	\$1,424	\$1,500	\$1,525	\$1,362	\$1,312	\$1,342	\$1,328
# AFD Pledges	987	967	1021	976	993	1009	1015
Avg. AFD Pledge	\$1,443	\$1,551	\$1,494	\$1,395	\$1,321	\$1,330	\$1,308

*In 2012, our data base records do not allow us to accurately distinguish between initial pledges and the 2nd “ask.”

Key FY 2017 Financial Results

- We again ended the year with our Annual Operating Reserve (Contingency Fund) of \$48,000 intact and an operating surplus. As approved by the Board during our spring budgeting process, it was decided to allocate 50% of this Operating Reserve to help cover the pledge shortfall affecting our FY2018 budget, and 50% to make an additional payment on the Buchan mortgage.
- The operating surplus (\$114,000) resulted from budgeted but unfilled staff positions (SJ Director-7mos, Rentals assistant, Communications Coordinator), strong building rental income and on-going tight spending controls. The first two factors will not recur.
- Per a decision approved by the Board’s Finance Committee in early August, the operating surplus of approximately \$114,000 will be allocated as follows (note: the actual surplus amount may vary somewhat from this figure, based on any adjustment entries determined by our auditors):
 - \$30,000 dedicated to completing the repairs to the sanctuary roof and parapets. This will leave significant deferred roof work primarily over the office structure.
 - \$24,000 additional principal payment on the Buchan mortgage, bringing our additional payment this year to \$48,000. (Discussions have begun with the Foundation Board about possibilities to retire our mortgage.)
 - \$60,000 as a reserve to cushion confirmed reductions in rental income from our long term tenant, Northwest Academy (NWA), at the end of their current lease (June, 2018). NWA is seeking a lease for at least another 5 years, possibly as much as 10 years; but they will be reducing the amount of space they require. We will work with a commercial realtor to find an additional long-term tenant; but the chances of an interruption of our income flow are likely. Should this reserve not be needed, these funds can also be applied to the reduction of our mortgage.
- Our FY2018 budget makes use of \$72,200 drawn in from various reserve funds to cushion approximately half the loss of pledge income. The drawing down of reserves to balance our budget is not sustainable and most probably not repeatable.
- Plans to deal with the balance of the shortfall are due and will be available in September.
- No draw-downs from our Major Repairs & Equipment Reserve or the Safety Reserve Fund were needed this year, leaving their respective balances at \$159,654 and \$140,235.

- Last fall, for the first time, our Annual Fund Drive (AFD) offered congregants the option to set up an auto-renewing pledge through whatever auto-payment plan they preferred (their own bank pay, debit or credit card, church-initiated secure payment service), so that we won't have to start from ground zero every year. We'll emphasize this again for this fall's AFD 2018.
- We continue to operate within the covenants of the Wells Fargo mortgage, and our positive cash flow prevented the need to use our line of credit. As more congregants make their pledges via some sort of automatic payment, our cash flow has become steadier.
- Another successful Auction was held this spring bringing in nearly \$52,000. These funds are being used to upgrade Fuller Hall and Daisy Bingham, including new flooring, wall treatments and – thanks to a generous donation from the Alliance – new tables and chairs.
- We are currently in the process of renegotiating our union contract, the impact of which is not yet known.

7) Original: Takes a leadership role in the larger Unitarian Universalist movement, maintaining connections with other Unitarian Universalist congregations and institutions as well as the local interfaith community.

Revised: The ministers and congregation develop and maintain relationships with other Unitarian Universalist congregations and institutions and the local interfaith community, helping to provide leadership in the larger Unitarian Universalist movement and community.

E.T. Interpretation: Individual leaders, both ordained and lay, will continue to offer their gifts of leadership to our larger family of faith and the local religious community. That leadership grows out of the vibrancy of our ministry and the caliber of our leaders. Relationships will be maintained with the neighboring congregations, area UU ministers and the interfaith community.

E.T. Assessment: We believe we are in compliance.

2017	2016	2015	2014	2013	2012
3.63	3.88	3.81	NA	NA	NA

Measures: Monitoring is to be done by report of involvement by ministers and others in the community, district and national levels. This Element will no longer be included in the congregant survey.

Bill's service as Interim UUA Co-President was recognized by the UUA as a significant contribution by the congregation. DeReau's selection to serve on the Commission on Institutional Change is another significant leadership commitment to our larger family of faith. Tom and Bill are participating in a UUMA investigation of 2nd Ministries.

8) Witnesses as a voice of conscience in our community and beyond, collaborating with other justice-seeking institutions, encouraging congregants to join others in building a more equitable, sustainable, and peaceful future for all.

E.T. Assessment: We believe we are in compliance as indicated by the extensive involvement of congregants in our justice work and the on-going witness of our ministers.

Responses in the Congregational Survey rated "Witnesses as a voice of conscience in our community, collaborating with other justice-seeking institutions, encouraging congregants to promote social justice in the Portland community and beyond" at a significantly reduced level (-13%).

We believe this reduction reflects the loss felt at Kate Lore's resignation. It does not reflect the energy or the

achievements of this last year. Rev. Sinkford has worked closely with our lay leaders through the year and T. J. FitzGerald provided excellent support for our Action Groups and community relationships. In fact, we hosted more, large community based events than we have in past years.

2017	2016	2015	2014	2013	2012
3.82	4.39	4.24	4.47	4.61	4.51

As many as 750 congregants are active in our social justice ministry in some way.

Comment from T. J. FitzGerald: This was a year of great challenges and greater accomplishments. In the opening months of the church year, our long-serving Minister of Social Justice resigned to pursue other opportunities. The Social Justice Council, comprised of representatives from the church’s ten active social justice groups, along with its three-member Leadership Team, accomplished the hard, self-searching work of relying on one another and their own considerable skills and talents to make this year into one filled with the justice-seeking, justice-making work First Unitarian is so well-known and well-loved for providing. The annual theme for the Social Justice Council was “Beyond Oppression.” Here are some of the highlights of the year:

- A major addition to the Social Justice work of the church was the beginning of the Immigrant Justice Action Group, which now has more than 200 members who receive regular updates on issues and actions affecting the rights of those in the process of migration and ways of supporting and witnessing for those persons.
- We also hosted a wide range of events at the church. In total, taking together film showings, trainings, and other events, the church hosted 40 separate social justice events this year, including a number of trainings in the area of recognizing and interrupting the effects of white supremacy.
- Social Justice groups came together to host two All-Church Dialogs: one on homelessness and houselessness in the fall, and one on climate change in the spring.
- We hosted Tom Andrews, President and CEO of the Unitarian Universalist Service Committee for the annual Sewell Lecture on the subject of growing global divisions between ethnic and cultural groups and the impact these divisions have on human rights.
- The “Stand Together” day of training and education was the Council’s major “Beyond Oppression” event. In partnership with 350 PDX and other community groups, we welcomed close to 300 people into the church, mostly community members and neighbors.
- We also played host to a 275-person conference offered by the Nasty Women Get Shit Done group in Portland and provided space for an event hosted by Earl Blumenauer concerned with single-payer healthcare where more than 600 of our neighbors attended.
- First Unitarian took the lead in organizing 250 UUs from all over Oregon to march in the Women’s March on January 21, 2017, a contingent to march in the People’s Climate March on April 29, 2017, and a loud and proud group for the Annual Portland Pride Parade on June 18, 2017.

Dana Buhl was named to fill the Acting Social Justice Director position at year end. She has begun her work. Budgetary constraints required this to be a less than full-time position. Following the model of Music Director search, Dana will be able to apply for the permanent position. We anticipate a search for a permanent director, following and contingent on the Annual Fund Drive.

Committees, Action and Interest Groups – 2016-2017

NAME: Africa Connections

CHAIR: Ann Pickar

MEMBERS: Africa Connections supports three organizations led by church members:

- The Imani Project, chaired by Marlene Anderson
- Zimbabwe Artists Project, chaired by Elissa Adair
- Quilts for Empowerment, chaired by Mary Ann McCammon

A core group of around 12 attend monthly planning meetings. We have a mailing list of around 100.

MISSION:

The mission of Africa Connections is to engage the congregation of First Unitarian Church in building a beloved global community by deepening relationships with the communities of the Imani Project and Quilts for Empowerment, both working in Kenya, and the Zimbabwe Artists Project in Zimbabwe.

Africa Connections affirms the shared commitment that each of these organizations has made to strengthening self-sufficiency.

MAJOR ACCOMPLISHMENTS:

- **IMANI PROJECT:** Continued work in 68 villages on the coast of Kenya, including educating villagers on AIDS prevention, sponsoring 90 AIDS orphans and many other projects to enhance the lives of villagers. Since our founding the number of villagers dying of AIDS has dropped by 90%.
- **QUILTS FOR EMPOWERMENT:** Accepted as one of the organizations supported by Africa Connections. Continued work with women recovering from fistula surgery to move toward self-sufficiency by developing quilting skills.
- **ZIMBABWE ARTISTS PROJECT:** Continued work in support of women artists in Weya, Zimbabwe by successful sales and events throughout the Portland metro area, and in partnership with UU international organizations.

NAME: The Alliance

CO-PRESIDENTS: Barbara Morrison and Jan Wolf

MEMBERS:

The Alliance has 130 members this year.

MISSION/PURPOSE:

The Alliance of First Unitarian Church, begun in 1865, and open to all in our faith community, provides regular opportunities for fellowship, life-long learning and spiritual growth for its members as well as service to the church and larger fellowship.

MAJOR ACCOMPLISHMENTS:

- Updated audio/visual technology in the Eliot Chapel to “state of the art” by creating the Pat Stipe Production Center, thanks to a generous memorial gift from Paul Stipe in honor of his mother and her service to the Alliance. The Alliance funded about 10% of the cost.
- Programs – speakers from the Portland community, including artists, politicians and educators, were invited to present programs, September through May, on current topics.
- Record Greens Sale profits enabled us to make the following gifts: \$5000 to five local charitable organizations; \$1,000 sponsorship of 2016 Church Auction; additional \$5,000 toward Auction proceeds to purchase new chairs and table for the Fuller Hall enhancement; \$500 for the church’s Mosaic Project.

NAME: Archives Committee

CHAIR/CONTACT: Arnold D. Pickar

MEMBERS:

Ron Jamtgaard, Arnie Pickar, Leslie Pohl-Kosbau, Ruth Robinson

MISSION:

To gather and maintain a repository of documents and other items which capture the life of the congregation and to make this collection available for research, inspiration and celebration."

MAJOR ACCOMPLISHMENTS:

During the past year the task of inventorying our collection and putting that information into searchable digital records was mostly completed. Currently the paper holdings are being sorted by time period and placed in archival quality folders and containers in our new humidity-controlled storage space.

NAME: Art Wall Committee

CHAIR: Connie Cleaton

MEMBERS:

Julie Forbes
Glenda Goldwater
Sherry Hall
Mary Holderness
Harriet Levi
Devon Mitchell
Ann Olson
Leslie Pohl-Kosbau
Brent Schauer
Ruthann Shetler

MISSION/PURPOSE:

Our goal is to select original local art to display in Fuller Hall, providing a stimulating, enlightening, visual experience that may encourage spiritual growth through the use of the creative process.

MAJOR ACCOMPLISHMENTS:

We contact many local artists, jury their work, and install ten shows a year.

NAME: Auction 2017: Creating Connections

CHAIRS: Sharon Dawson and Evie Zaic

MEMBERS:

Lena Lee
Kathy Ludlow
Pat Malone
Jean Omelchuck
Brent Schauer
Janice Yaden
Marti Yoder
Ron Yoder
Ann Zawaski

MISSION/PURPOSE:

To raise money for refurbishing Fuller Hall and Daisy Bingham, and to create connections among members of First Unitarian.

MAJOR ACCOMPLISHMENTS:

- Raised about \$52,000
- Created many new and lasting connections between members

NAME: Beacon Bookstore

CHAIRS/CONTACTS: Donna Deacon and Julia Spence

MEMBERS:

Donna Deacon	Cheryl Macy	Jeanne Vore
Lynn Ferguson	Peg MacNicol	Anne Weber
Glenda Goldwater	Carolyn Nasca	Mary Weller
Ann Habafy	Susan Pryor	Lorraine Wheeler
Kent Johnson	Sally Shorr	Pam Williams
Doug Lowell	Julia Spence	Cynthia Yee
Kathy Ludlow	Albert Starr	

MISSION/PURPOSE:

Provide a welcoming place for congregants and visitors of all ages to find books to learn about our faith, deepen their spirituality, explore social justice issues, and prepare for classes offered at our church.

MAJOR ACCOMPLISHMENT:

We met our mission.

NAME: Caregiver Support Group

CHAIR: Woody English, Helena Lee

MEMBERS:

Various congregants

MISSION/PURPOSE:

Provide support, inspiration, and resources for those caring for loved ones either at home, in a facility, or at a distance.

MAJOR ACCOMPLISHMENT:

Offered support through monthly meetings to 38 congregants and their loved ones.

NAME: Committee on Hunger and Homelessness

CHAIRS/CONTACTS: 2016-2017 Co-chairs: Donna Lane, Donna Richards; 2017-2018 Co-chairs: Mary Andrews, Ellen Vanderslice

LEADERSHIP: John Elizalde, Ingrid Gjestvang, Sarabelle Hitchner, Karen Shimoda, Cynthia Sulaski, Cynthia Yee

MISSION/PURPOSE:

We strive to limit the effects of hunger and homelessness in our community through individual and collective acts of service.

MAJOR ACCOMPLISHMENTS:

- Collected and distributed more than 1000 pounds of food, 60 sleeping bags, and ongoing supplies of toiletries and diapers for family homeless shelters, First Unitarian's pantry, and JOIN.
- Helped prepare and serve breakfast once per quarter for about 250 hungry folks at Clay Street Table.
- Conducted a holiday toy and clothing drive for children experiencing homelessness.
- Advocated with community leaders on behalf of those experiencing homelessness.

NAME: Community for Earth

LEADERSHIP TEAM: Bryan Brumley, Linda Craig, Keith Iding

MEMBERS:

About 20 regular activists and a mailing list of over 100 people

MISSION/PURPOSE:

We act on the Seventh Principle of Unitarian Universalism: "Respect for the interdependent web of all existence of which we are a part". Our purpose is to inspire, support and promote changes in ourselves, our congregation, and our society. We strive to connect our spiritual community through education, action, and faith in our ability to protect the earth for our children and ourselves.

MAJOR ACCOMPLISHMENTS:

- Hosted several dozen First Church members and friends for an All-Church Conversation

- Created and funded project to install solar panels on the church roof to supply a portion of the energy need.

WEBSITE: <http://commit2respondpdx.org/>

NAME: Contemplative Practice Group

CO-FACILITATORS: Patty Clement and Ron Walker

MEMBERS:

From 7 to 17 people have attended our twice-monthly drop-in meetings this year. Our email roster lists 52 people currently.

MISSION/PURPOSE:

To offer a contemplative space for personal spiritual growth and deepening in community.

MAJOR ACCOMPLISHMENT:

Our accomplishment is the meeting itself. In general we provide support for being, not doing. In the meeting we do a 20 minute silent meditation, a check-in on a spiritual theme, and a *lectio divina* using poetry.

NAME: Economic Justice Action Group

CHAIR(S)/CONTACT(S): David Delk, Michael Wade

MISSION/PURPOSE: Raise public awareness and take action on behalf of our congregation and our community, nation, and world in order to:

- Promote the supremacy of life-sustaining and life-enhancing values
- Promote fair and just economic policies and practices, and work to overcome unfair policies and practices
- Promote equal access to economic opportunity
- Promote democratic participation in national, state and local decisions on economic issues
- To collaborate with other like-minded organizations (in the church and beyond) to increase the effectiveness of our efforts

MAJOR ACCOMPLISHMENTS:

- Trauma Informed Care Forum
- Farm Workers Tour (with IJAG)
- Rental Crisis Forum – Evicted (everybody reads)
- Movie, Book, Speaker Events
- Two Reading Groups – Reading and Discussion, Inequality

NAME: Ending the New Jim Crow

CONTACT PERSON: Kathryn Scotten

MEMBERS:

Steering committee consisting of Catherine Carroll, Barbara Dow, Sandy Hart, Kathryn Scotten, Elizabeth Willbach, Carol Witherell. Mailing list of approximately 180 names for event notices.

MISSION/PURPOSE:

Contribute to local, state, and national efforts to dismantle the policies and practices, collectively known as “the New Jim Crow,” that over the past several decades have resulted in mass incarceration of people of color, in fractured families, and in disenfranchised communities.

MAJOR ACCOMPLISHMENTS:

- Showing of the documentary film “13th” (directed by Ava DuVernay of “Selma”), with discussion led by a formerly incarcerated African-American man.
- “Confronting Death Row from Both Sides: an Exoneree and a Former Prison Superintendent Speak Out Against the Death Penalty.” An Oregon Justice Resource Center Program hosted/co-sponsored with ENJC/First Unitarian Church.
- “Restorative Justice in our Schools: Two School Portraits.” Sponsored by ENJC in collaboration with Madison High School, Reynolds Middle School, and Resolutions Northwest. A panel discussion with panelists from each of our guest sponsors, co-facilitated by Maria Scanelli of Resolutions Northwest and Sidney Morgan of Portland Public Schools, followed by small group discussions.
- “Beyond Oppression: Understanding White Privilege.” Facilitator Dana Buhl engaged participants in understanding while privilege with video excerpts and small group dialogues. Co-sponsored with First Church’s Immigrant Justice Action Group.

NAME: Good Times Program

CHAIR: Laura Gadley

MEMBERS:

Mele Howland, Bill and Ellie Kirkham, Patricia Reynolds, Jamie Smith, Lydia Swagerty, Jean Trygstad

MISSION/PURPOSE:

Help make the Church a warm and welcoming community by facilitating fun, inclusive events.

MAJOR ACCOMPLISHMENTS:

- Staffed weekly table in Fuller Hall to publicize events carried out by subgroups: Book Club, Bridge Club, Circle Suppers, Movie Discussion Group, TGIF (Thank God It’s Friday), UU Brew.
- Updated Mission Statement.

NAME: House and Grounds

CHAIR: Kathy Ludlow, Marti Yoder

MEMBERS:

Ad hoc; we activate when weather and schedules permit.

MAJOR ACCOMPLISHMENT:

Mostly weeding around the church campus. More “grounds” than ‘house’.

NAME: Immigrant Justice Action Group

CHAIR: Wendy Rankin

STEERING COMMITTEE MEMBERS:

Diana Bennett, Doug Brown, Sharon Dawson, Katherine Jesch, Helena Lee, Wendy Rankin, Leila Wrathall, Evie Zaic, and Ann Zawaski.

MISSION/PURPOSE:

In keeping with our seven principles and as social justice allies, our mission is to support and enhance the rights of refugees and immigrants in our community. We provide information and promote understanding and engagement of our fellow UU congregants to these ends.

MAJOR ACCOMPLISHMENTS:

- Showed up as witness in solidarity at rallies, vigils and demonstrations
- Developed and maintained relationships with other immigrant supporting organizations and community groups (Causa, Interfaith Movement for Immigrant Justice, Voz)
- Organized and promoted two all church meetings on the history of Immigration (70 in attendance) and White Privilege (40 in attendance)

NAME: UU Knitters

CONTACT: Susan Pryor

MEMBERS:

Marie Ballard	Kathy Ludlow	Suzanne Schmidt
Frances Caldwell	Toni Paget	Liz Scully
Elizabeth Cooksey	Lynn Palmer	Karen Shavel
Carol Doehne	Mary Post	Carol Stout
Tina Hair	Susan Pryor	Judy Welles
Pat Jeske	Fenella Robinson	Jeannine Wethern
Dorothy Lewis	Lilly Roselyn	

MISSION/PURPOSE:

Knit items for the homeless and needy while enjoying the comradery and spirituality of our group.

MAJOR ACCOMPLISHMENTS:

- We have provided hats, scarves, socks, gloves, and blankets to the First Church family shelter and other Portland shelters.
- We gave dozens of knitted items to the Alliance Christmas Sale, which also benefits the needy.

NAME: LGBTQIA PRIDE GROUP

CHAIR/CONTACTS: Chair: Steven Phoenix. Leadership Team: Jim Carroll, Curtis Meyers, Joanne O’Connell, Steven Storla

MEMBERS: There are currently 164 members.

MISSION/PURPOSE:

Provide outreach to the LGBTQIA community and be a visible presence at coffee hour. Members organize social activities and fundraisers, coordinate volunteer activities, and participate in the church’s social justice activities.

MAJOR ACCOMPLISHMENTS:

- Ongoing, consistently scheduled monthly events that provide sanctuary and build the Beloved Community we seek.
- Visibility to new members. When allies and friends see the Pride Flag and group, they know our Beloved Community is truly accepting and loving to all. This sparks interest in our church.

NAME: Meditation Group

CONTACT: Mary Ann Harman

MEMBERS: Drop in, varies from week to week

MISSION/PURPOSE:

To offer group support in reducing the suffering of ourselves and others through Buddhist practices.

MAJOR ACCOMPLISHMENTS:

- Group members report coming to the group because they feel the group's support in their meditation practices, and because they are growing in relationship with each other through the book discussions.
- All those who come somewhat regularly report increasing acts and thoughts of compassion.

NAME: Membership Committee

CHAIR: Ed McClaran

MEMBERS: Jim Garrison, Mele Howland, Robin MacRae, Ed McClaran, and Joanne Riese.

MISSION/PURPOSE:

Welcome newcomers and visitors, facilitate the membership process, help new members make connections in the church, and assist churchgoers in sustaining their relationship with the church.

MAJOR ACCOMPLISHMENTS:

- Staffed the Sunday Service welcome desks and newcomer tables.

- Hosted the annual new member reception at Rev. Disrud's home.

NAME: Men's Support Group

MAJOR ACCOMPLISHMENTS:

Met throughout the year. New members are recruited occasionally; otherwise we are closed. Confidentiality is maintained.

NAME: Mental Health Action Group

CHAIR/MEMBER: Rosemary Kirwin-Alvord

MISSION/PURPOSE:

The work done by the Mental Health Action Group is a response to the calling of the first principle of Unitarian Universalism: "to affirm and promote the inherent worth and dignity of every person." We work to promote awareness and understanding of mental health issues across the lifespan in the church and community.

MAJOR ACCOMPLISHMENT:

Tabling two Sundays per month.

NAME: Mosaic Project

CHAIR: Leslie Pohl-Kosbau

MEMBERS:

Lynne Bacon, Suzanne Kosanke, Mary Ella Kuster, Ruth Lewellen-Dix, Victoria Meier, Pam Noble, with many more "hands-on" volunteers.

MISSION/PURPOSE:

To restore and relocate to the Buchan courtyard, the "God is Everywhere" Children's Mosaic, built by the children and adults of First Unitarian Church in 1958-59 and dedicated in 1960, with the new RE building of the time.

MAJOR ACCOMPLISHMENTS:

- Repaired panels (now about two-thirds complete).
- Held three Open Houses in the Buchan Courtyard to show congregants our progress.
- Fundraising for the superstructure to remount the panels.
- Taught a class on the art and architecture of our Church.

NAME: Peace Action Group

CHAIR: Tess Beistel

MEMBERS: 20 active members

MISSION:

We gather to create peace in the world: by nurturing and empowering each other and ourselves as peace activists; by creating a community that sustains hope in the unending work of making peace; and by inspiring, educating and mobilizing our community to work for peace.

MAJOR ACCOMPLISHMENTS:

- Focused on the Syrian refugee crisis: worked with local refugee resettlement agencies and registered First Church as a potential partner for a refugee family.
- Held a successful forum on gun violence and pending Oregon legislation on sensible gun laws.
- Continued the monthly Ritual of Remembrance at our table, creating a sacred space for congregants to commit to working in their own ways for personal and global peace.
- Post-election, we created a ritual for congregants to express their hopes and commitments in small prayer flags attached to a Winter branch.

NAME: Quilts of Love

COORDINATOR/CONTACT: Anna Thorn

PURPOSE:

Working with donated fabrics, Quilts of Love members create warm and wonderful quilts and pillowcases for families who move from our 13 Salmon Day Shelter and the Goose Hollow Overnight Shelter to homes of their own.

ACCOMPLISHMENTS:

QOL members worked together to create 35 quilts and 30 pillowcases for families served by Portland Homeless Family Solutions. We held an annual retreat, assisted The Alliance with creating sewn items for their annual Greens Sale, and hosted "Sewing for a Cause", an annual auction event.

MEMBERS:

Brenda Bell	Leslie Gordon	Lisa Nybakken
Becky Bent	Ingrid Gjestvang	Toni Paget
Jo Anne Boothe	Diane Gutman	Judy Perry
Lynda Byers	Emily Hardy-Ward	Alice Ringquist
Jan Clay	Katy Hardy-Ward	Liz Scully
Kate Coates	Stephanie Harlow	Anna Thorn
Gillian Cross	Suzanne Kosanke	Anne Upshaw
Carol Doehne	Nora Mullane	Janet Wolf
Gail Doxtader	Holly North	Camille Wright

NAME: Social Hour Fuller Hall

LEADERS – Emily Herbert - coordinator of volunteers and keeper of roster. Helen Warbington - chief coffee maker, trainer and purchaser of milks and supplies.

CONTACT: Emily Herbert

MEMBERS: 18 loyal members served consistently.

MISSION/PURPOSE: Provide beverage setup and service to support pleasant socialization in Fuller Hall after services every Sunday.

MAJOR ACCOMPLISHMENTS:

- Continued functioning despite absence of Helen due to a fall.
- Capable of working at light speed to do the work of 30 persons.

NAME: UU Animal Ministry

CONTACT: Janice Clark

MEMBERS:

Andrea Amour, Brenda Bell, John Bell, Janice Clark, Krystal Espana, Sal Espana, Donna Estry, Hal Estry, Julie Grice, Keith Iding, Debbie Kaufman, Christopher Kirschbaum, Sabrina Louise, Stephanie Lucas, Steven Storla

MISSION/PURPOSE:

Our purpose is to promote understanding and awareness of animals as fellow sentient beings in line with our 7th UU Principle, and provide support to interested members and to the church community as a whole.

MAJOR ACCOMPLISHMENTS:

- Started a film series
- Visited animal sanctuaries
- Sponsored vegan potlucks

NAME: UUA Outreach Group

CHAIR/CONTACT: Bill Pryor

MEMBERS: Stan Jewett, Ed McClaran, Leslie Pohl-Kosbau, Fritz Staats, Ken Wheeler

MISSION:

Help the congregation connect with and support the larger UU faith movement, collaborate with other congregations, and facilitate our participation in the UUA governance process

MAJOR ACCOMPLISHMENTS:

- Recruitment and training of delegates for District Assembly and General Assembly
- Representation of First Unitarian at Mount Hood Cluster events.

NAME: UU Men's Community

CONTACTS: Luke Groser, Don Liedel

MISSION/PURPOSE:

Provide a safe environment for heartfelt, soulful sharing. Learn from each other, develop friendships, support one another and have fun. Plan and lead events and classes

MAJOR ACCOMPLISHMENTS:

- Held monthly meetings which are open to men of all ages.
- Organized annual Men's Retreat weekend.
- Called on "Baker Boys" to raise funds at the annual church auction.

WEBSITE: <http://uumensgroup.pbworks.com/w/page/6227056/FrontPage>

NAME: Ushers

LEAD USHER COORDINATOR: Dev Dion

MISSION AND MAJOR ACCOMPLISHMENTS:

- Ushers provide a friendly greeting to congregants each Sunday and look after their safety.
- Help new parents find Learning Center

MEMBERS:

Garry Rossing	Judith Scott	Judy Holmboe
Warren Hatch	Brent Schauer	Luke Pond
Janet Harris	Carol Touchet	Fred Brace
Connie Cleaton	George Janis	Betty Brace
Korynn Underwood	Jim Keiter	
Jody Wynnyk	Dianne Schauer	
Jason Howd	Jeanne Lamont	
Carol Parks	Krista Reynolds	
Mardean Duckworth	Robert Dismukes	
Marti Yoder	Paula Raines	
Ronald Yoder	Vonne Williams	
Ed McClaran	Joseph Williams	
Dave Roberts	Lois Heinlein	
Judy Holmboe	Leila Wrathall	
Gael Nance	Alyssa Moretz	
Devereaux Dion	Valerie Lyon	
Martha Peck Andrews	Barbara Hansen	
Lynn Kribs	Carl Richter	
Donald Mather	Alison Richter	
Robin MacRae	Petie Padden	
Elizabeth Britt	Mary Jean Katz	
Betty Ann McKay	Susan McParker	
Sarah Vandehey	Lonnie Martinez	
Ann Bennet	Delise Picard	
Gael Nance	George Ammerman	
Pat Watne	Dan Karnes	
Quinn Sullivan	Leila Wrathall	
Steve Goodrich	Paul Sturges	
Kate Brickey	Josh Soske	

NAME: Women's Circles

MAJOR ACCOMPLISHMENTS:

These groups met throughout the year. All recruit new members occasionally, but are otherwise closed. Confidentiality is maintained.

NAME: YRUU Youth Council

MEMBERS: Aya Doslu, Marty Hill, Piper Kittersong, Tate Kruse, Kaleigh Lucas, Max Nathe, Frankie Taylor.

MISSION/PURPOSE:

The Youth Council is elected by the high school youth group, YRUU (Young Religious UUs). The Council meets regularly to debrief previous Sundays (discussing what worked well and any adjustments that need to be made), and they vote on upcoming topics and activities in YRUU.

MAJOR ACCOMPLISHMENTS

- Voted to distribute sandwiches and socks on the streets of downtown Portland on the mornings following YRUU overnights.
- Voted to create Thanksgiving Food Boxes (including kitchen supplies) to be delivered to families who recently transitioned out of 13 Salmon and into affordable housing.

Sermons

Date	Sermon Title	Speaker
7/3/2016	A Septuagenarian Seized the Sabbath	Rev. L. Breen
7/10/2016	Being Lazy - In All Good Conscience	Rev. Kate Lore
7/17/2016	Independence, Dependence & Interdependence	Rev. J. Kabal-Komoto
7/24/2016	Learning to Speak in Poetry	Rev. Thomas Disrud
7/31/2016	What Would King Do	Rev. Mary Gear
8/7/2016	The Journey in Process	Rev. Thomas Disrud
8/14/2016	Changing How We See Awakening. From the Illusion of Separateness	Guest Jan Musgrove-Elfers
8/21/2016	Spiritual or Religious. The Great Divide	Rev. Dr. Emily Brualt
8/28/2016	To Question is to Answer	Rev. Bill Sinkford
9/4/2016	Crossing Boundaries, Finding Wisdom	Rev. Katherin Jesch
9/11/2016	The Welcome Table	Rev. Bill Sinkford
9/18/2016	The Better Angels of Our Nature	Rev. Bill Sinkford
9/25/2016	Will You Pray With Me	Rev. Thomas Disrud
10/2/2016	Bless the Imperfect	Rev. Bill Sinkford
10/9/2016	Rarefied Err	Intern Minister T. J. Fitzgerald
10/16/2016	Now More Than Ever	Rev. Bill Sinkford
10/23/2016	Heartfelt Farewell	Rev. Kate Lore
10/30/2016	Diwali	Rev. Bill Sinkford
11/6/2016	Winners and Losers Part I	Rev. Bill Sinkford
11/13/2016	Winners and Losers Part II	Rev. Thomas Disrud
11/20/2016	Going My Way	Rev. Bill Sinkford
11/27/2016	Parts of Speech	Intern Minister T. J. Fitzgerald
12/4/2016	To Be Counted	Rev. Bill Sinkford
12/11/2016	Ave Maria	Music & Worship
12/18/2016	Season of the Soul	Rev. Bill Sinkford
12/25/2016	Peace Breaks Out	Intern Minister T. J. Fitzgerald
1/1/2017	What Will We Bring	Guest Congregants
1/8/2017	A New Day	Rev. Bill Sinkford
1/15/2017	Conscious Objector	Intern Minister T. J. Fitzgerald
1/22/2017	Building a New Way	Rev. Thomas Disrud
1/29/2017	Defense Against the Dark Arts	Guest K. Gibbons
2/5/2017	Return to Laughter	Rev. Bill Sinkford
2/12/2017	Thank You Mr. Trump	Guest R. Bray-McNatt
2/19/2017	Answering the Call to Joy	Rev. Thomas Disrud
2/26/2017	Surprised by Joy	Intern Minister T. J. Fitzgerald
3/15/2017	Love and Devotion	Guest A. Herrera
3/12/2017	Practice, Practice, Practice	Rev. Bill Sinkford
3/19/2017	In the need of Prayer	Rev. Bill Sinkford
3/26/2017	A Friend Indeed	Intern Minister T. J. Fitzgerald
4/2/2017	The America That is Being Born	Rev. Bill Sinkford

4/9/2017	Annual Youth Service	Intern Min. T. J. Fitzgerald & Cathy Cartwright-Chow
4/13/2017	Maundy Thursday	Rev. Thomas Disrud & Intern Min. T.J. FitzGerald
4/16/2017	Sanctuary - Mystery at the Heart of Things	Rev. Bill Sinkford & Rev. Tom Disrud
4/16/2017	Eliot - Fertile Ground	Intern Min. T. J. Fitzgerald & Cathy Cartwright-Chow
4/23/2017	Earth Is Our Homeland	Rev. Tom Disrud
4/30/2017	Holding the Center	Guest Lissa Gundlach
5/7/2017	Privilege, Supremacy and Power	Rev. Bill Sinkford and Dana Buhl
5/14/2017	Patient and Purposeful Love	Guest Rev. Janne Eller Isaacs
5/21/2017	Expecting the Main Things From You	Music & Worship
5/28/2017	Piece of My Heart	Intern Minister T. J. Fitzgerald
6/4/2017	The Shadow Knows	Guest Minister Mary Gear
6/11/2017	Searching & Finding	Rev. Bill Sinkford
6/18/2017	The Place Just Right	Rev. Tom Disrud
6/25/2017	Community Rules	Intern Minister T. J. Fitzgerald

Child Dedications – July 2016 - June 2017

Eleanor Rosemary Buckmaster	Walter Duncan Hall
Jude Thurmond Mouser	Cora Rose Rogers Hagerman
Samuel Joseph Van Clock	Sabine Rogers Hagerman
Brodie Anne Van Clock	August Hudson Webber
Lila Christina Van Tol	Desmond Andrew Farney
Mira Eller-Furgeson	Julian Martin Farney

Passages – July 2016 - June 2017

Lee Davis	Della Horowitz	Mary Rosenberg
Vicki Dotson	Irving Horowitz	Joan Ruddy
Joyce Messina Garrison	Eleanor Hunting	Marcia Schekel
Russell Gilman-Hunt	Tim Kyle	Geraldine Sinnard
Jane Glazer	Virginia Lissitz	Patricia Stipe
Margaret Gribbskov	Dody Orenduff	Clifford Wamacks
Sue Hagmeier	William Palo	John Westgate
Sis Hayes	John Partridge	

New Members – July 2016 - June 2017

Kristin Anderson	Daniel Baxter	Cyndi Challacombe
Janis Babic	Michael Bluhm	Das Chapin
Paul Babic	Sara Bossen	Christopher Corbell
Mark Barham	Bridget Brown	Michael Cowan
Mary Ann Barham	Matthew Warren Brown	Jo delAmor
Tim Batiuk	James Carroll	Dolores Dinneen

James Dunn
Jill Duren
Paige Eichelman
Sheryl Eldene
John Elizalde
Jo Ann Foor
James Fotter
Ann Gormley
Richard Grant
Barbara Haga
Chris Hagerman
Judith Holmboe
Adam House
Jennifer Huang
Gail Huggett
Tom Huggett
Paula Johnson
Donna Khatib
Evan Kuhlmann
Ruth Lane
Cheryl Lewis

Glenn Manker-Seale
Thomas Manthey
Jennifer Martin
Fred Masarie
Kathleen Masarie
Mary Ann McCammon
Stephen McCammon
Maveret McClellan
Fiona McDonald
April McFerran
Curtis Meyers
Devon Mitchell
Tre Monaghan
River Montijo
Marjorie Mountainsong
Karen Mouser Darr
Mary Neustadter
Deborah Ogden
Dana Orlosky
Lynne Patton
Rosalea Peters

Amanda Punton
Bonnie Robb
Jane Robson
Molly Rogers
Samuel Ross
Teresa Schader
Karen Shavel
Karen McAlister Shimoda
Paul Souders
Quinn Sullivan
Lisa Summers
Brandy Turnbull
Lisa Van Clock
Jennie Vinson
Kathleen Vinson
Scott Vinson
Erna Walter
Pete White
Wendy Leigh White
Karen Wilcox

Church Statistics – Fiscal Year 2017

Voting Members certified to the Unitarian Universalist Association:	1,050
Pledging households:	984
RE Enrollment:	451
Average weekly adult attendance (excl. summer months & livestream):	730
Average weekly livestream viewers (excl. summer months):	111

Ministers and Staff – 2016 - 2017

Rev. Bill Sinkford, *Senior Minister*

Rev. Tom Disrud, *Associate Minister*

Mary Gear, *Acting Assistant Minister in charge of Adult Programs*

Crystal Zerfoss, *Intern Minister*

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Nicole Bowmer, *Associate Director of Family Ministries*

Cathy Cartwright-Chow, *Director of Family Ministries*

Jason Chapman, *Facilities Manager*

Saajan Chauhan, *Communications Coordinator*

Zaida Cooper, *Controller*

Kathryn Estey, *Church Administrator*

DeReau Farrar, *Director of Music*

Zeke Fetrow, *Director of Handbell Choirs*

Signe Lusk, *Pianist*

Holli Nicknair, *Rentals Manager*

Joe O'Donnell, *Organist*

John Rosette, *Receptionist/Exec. Team Assistant*

Cassandra Scheffman, *Assistant to Soc. Jus. Director/Assoc. Dir. of Adult Programs*

Kamal Sunuwar, *Lead Sexton*

Erin Tafuri, *Database and Stewardship Coordinator*

**First Unitarian Church  
Fiscal Year-End Operating Summary  
6/30/2017**

|                                                     | ACTUAL<br>OPERATIONS<br>YEAR TO DATE | ACTUAL<br>OPERATIONS<br>YEAR TO DATE | ACTUAL<br>VARIANCE | BUDGET<br>YEAR TO DATE | BUDGET<br>VARIANCE | ANNUAL<br>BUDGET |
|-----------------------------------------------------|--------------------------------------|--------------------------------------|--------------------|------------------------|--------------------|------------------|
|                                                     | 6/30/2017                            | 6/30/2016                            | FY17 TO FY16       | 6/30/2017              | 6/30/2017          | FY2017           |
| <b>Church Operations</b>                            |                                      |                                      |                    |                        |                    |                  |
| <b>Operating Income</b>                             |                                      |                                      |                    |                        |                    |                  |
| Pledge Income                                       | 1,412,074                            | 1,378,608                            | 33,466             | 1,461,600              | (49,527)           | 1,461,600        |
| Contributions                                       | 123,994                              | 117,340                              | 6,654              | 129,000                | (5,006)            | 129,000          |
| Program Income                                      | 167,454                              | 178,984                              | (11,530)           | 173,291                | (5,837)            | 173,291          |
| Rental Income                                       | 470,480                              | 436,228                              | 34,253             | 399,120                | 71,361             | 399,120          |
| Other Income                                        | 55,864                               | 48,036                               | 7,829              | 40,100                 | 15,764             | 40,100           |
| Congregational Life Initiative                      | -                                    | -                                    | -                  | 50,000                 | (50,000)           | 50,000           |
| Transfer from Foundation                            | 56,909                               | 52,875                               | 4,034              | 50,000                 | 6,909              | 50,000           |
| Transfer In from non-operating accts                | -                                    | -                                    | -                  | 97,200                 | (97,200)           | 97,200           |
| <b>Total Operating Income</b>                       | <b>2,286,775</b>                     | <b>2,212,070</b>                     | <b>74,705</b>      | <b>2,400,311</b>       | <b>(113,536)</b>   | <b>2,400,311</b> |
| <b>Operating Costs</b>                              |                                      |                                      |                    |                        |                    |                  |
| Payroll Expenses                                    | 1,411,534                            | 1,351,887                            | (59,648)           | 1,489,322              | 77,788             | 1,489,322        |
| Congregational Life Initiative                      | -                                    | -                                    | -                  | 50,000                 | 50,000             | 50,000           |
| Occupancy Expense                                   | 274,088                              | 284,041                              | 9,953              | 262,322                | (11,766)           | 262,322          |
| Program Expense                                     | 306,466                              | 332,894                              | 26,428             | 367,688                | 61,222             | 367,688          |
| Rental Expense                                      | 14,031                               | 22,504                               | 8,473              | 22,620                 | 8,589              | 22,620           |
| Administration Expense                              | 38,594                               | 36,520                               | (2,074)            | 49,490                 | 10,896             | 49,490           |
| Interest Expense                                    | 63,108                               | 66,113                               | 3,004              | 64,163                 | 1,055              | 64,163           |
| Other Expense                                       | 4,175                                | 7,272                                | 3,097              | 4,200                  | 25                 | 4,200            |
| <b>Total Operating Costs</b>                        | <b>2,111,997</b>                     | <b>2,101,231</b>                     | <b>(10,766)</b>    | <b>2,309,805</b>       | <b>197,809</b>     | <b>2,309,805</b> |
| <b>Net Church Operations</b>                        | <b>174,778</b>                       | <b>110,839</b>                       | <b>63,939</b>      | <b>90,506</b>          | <b>84,273</b>      | <b>90,505</b>    |
| <b>Reserve Account Deposits</b>                     |                                      |                                      |                    |                        |                    |                  |
| Annual Operating Reserve                            | 48,006                               | 46,025                               | (1,981)            | 48,006                 | -                  | 48,006           |
| Major Repair & Equipment Reserve                    | -                                    | 1,417                                | 1,417              | -                      | -                  | -                |
| <b>Total Reserve Deposits</b>                       | <b>48,006</b>                        | <b>47,442</b>                        | <b>(564)</b>       | <b>48,006</b>          | <b>-</b>           | <b>48,006</b>    |
| <b>Net Church Operations After Reserve Deposits</b> | <b>126,772</b>                       | <b>63,398</b>                        | <b>63,375</b>      | <b>42,500</b>          | <b>84,273</b>      | <b>42,499</b>    |
| <b>Investment Income</b>                            |                                      |                                      |                    |                        |                    |                  |
| Dividend & Interest Income                          | 1,446                                | 1,272                                | 174                | -                      | 1,446              | -                |
| Realized Stock Gain (Loss)                          | -                                    | (157)                                | 157                | -                      | -                  | -                |
| Unrealized Stock Gain (Loss)                        | (583)                                | (575)                                | (8)                | -                      | (583)              | -                |
| <b>Net Investment Income (Loss)</b>                 | <b>862</b>                           | <b>540</b>                           | <b>323</b>         | <b>-</b>               | <b>862</b>         | <b>-</b>         |
| <b>Operating Surplus (Deficit)</b>                  | <b>127,635</b>                       | <b>63,937</b>                        | <b>63,697</b>      | <b>42,500</b>          | <b>85,135</b>      | <b>-</b>         |
| Buchan Principal Payment                            | 43,541                               | 31,657                               | 11,884             | 42,499                 | 1,042              | 42,499           |
| <b>Net Cash Effect</b>                              | <b>84,094</b>                        | <b>32,280</b>                        | <b>51,813</b>      | <b>1</b>               | <b>84,093</b>      | <b>-</b>         |
| Special Project Funded                              | 30,187                               |                                      |                    |                        |                    |                  |
| <b>Adjusted Net Cash Effect</b>                     | <b>114,281</b>                       | <b>32,280</b>                        | <b>82,000</b>      | <b>1</b>               | <b>114,280</b>     | <b>-</b>         |

FIRST UNITARIAN CHURCH  
PORTLAND, OREGON

STATEMENTS OF FINANCIAL POSITION  
at June 30, 2017 and 2016 (unaudited)

|                                                                         | 2017                | 2016 (unaudited)    |
|-------------------------------------------------------------------------|---------------------|---------------------|
| <b>ASSETS:</b>                                                          |                     |                     |
| <b>Current Assets:</b>                                                  |                     |                     |
| Cash                                                                    | \$ 1,041,660        | \$ 1,005,433        |
| Cash: loan reserve                                                      | 111,772             | 111,562             |
| Investments                                                             | 144,574             | 133,386             |
| Prepaid expenses                                                        | 24,213              | 29,929              |
| Operating pledges receivable, net of allowance of \$70,519 and \$75,439 | 581,175             | 610,375             |
| Capital pledges receivable, net of allowance of \$39,688 and \$54,162   | 34,449              | 81,418              |
| Bookstore inventory                                                     | 21,336              | 17,282              |
| Total Current Assets                                                    | 1,959,179           | 1,989,385           |
| <b>Non-current Assets:</b>                                              |                     |                     |
| Non-depreciable capital assets                                          | 613,424             | 613,424             |
| Depreciable capital assets, net of depreciation                         | 6,703,120           | 7,034,428           |
| Lease origination costs, net of amortization of \$4,646 and \$3,896     | 10,354              | 11,104              |
| Total Non-current Assets                                                | 7,326,898           | 7,658,956           |
| <b>Total Assets</b>                                                     | <b>\$ 9,286,077</b> | <b>\$ 9,648,341</b> |
| <b>LIABILITIES AND NET ASSETS</b>                                       |                     |                     |
| <b>Current Liabilities:</b>                                             |                     |                     |
| Accounts payable                                                        | \$ 9,929            | \$ 21,728           |
| Accrued absences                                                        | 69,309              | 59,731              |
| Commercial loan, current portion                                        | 47,068              | 42,495              |
| Unearned revenue                                                        | 21,429              | 32,599              |
| Unearned lease revenue                                                  | 393,456             | 402,956             |
| Total Current Liabilities                                               | 541,191             | 559,509             |
| <b>Noncurrent Liabilities:</b>                                          |                     |                     |
| Commercial loan                                                         | 1,376,222           | 1,464,534           |
| Total Liabilities                                                       | 1,917,413           | 2,024,043           |
| <b>Net Assets:</b>                                                      |                     |                     |
| Unrestricted                                                            | 6,853,552           | 7,072,295           |
| Temporarily restricted                                                  | 454,770             | 491,985             |
| Permanently restricted                                                  | 60,342              | 60,018              |
| Total Net Assets                                                        | 7,368,664           | 7,624,298           |
| <b>Total Liabilities and Net Assets</b>                                 | <b>\$ 9,286,077</b> | <b>\$ 9,648,341</b> |

Financial statements 2017 (Audited) and 2016 (Reviewed) prepared by Pauly Rogers and Co. PC, CPA