What We’ve Done and Where We Are Going:
A Forum on Our Church’s 5-year Goals

November 5, 2017
Church Vision Statement

First Unitarian Church is a beacon of hope for us and our community, a Spiritual center in the heart of the 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.
Agenda

1:00 pm Welcome
   Alan Comnes, Chair of Communications Committee
1:10 pm Review of Each Goal, including Q&A
   Governance—Cindy Cumfer
   Enhanced Giving and Buchan Bldg mortgage—Leila Wrathall
   Mission-Driven church—Ameena Amdahl-Mason
   Develop a long-term plan for church campus – Kathy Ludlow
2:40 pm Break out sessions
2:50 pm Closing / Plans for follow up
3:00 pm End
A Process of Vision, Policies, Collaboration, and Accountability

**Congregation**
- Elect
- Dialog

**Board of Trustees**
- Accountability
- Collaboration

**Executive Team**
- Responsibility & Direction

**Bylaws**
Requires the board to establish Ends policies and long-range goals

**Governing Policies**
Includes Mission and elements. Adoption of 5-and 1-yr goals

**5-Yr Goals**
- 1-Yr Goals
- 1-Yr Goals
- 1-Yr Goals
- 1-Yr Goals
- 1-Yr Goals
Timeline

2010 - Previous Five-Year Goals:
Initiate and support a process to address these major focus areas: spiritual growth; intergenerational congregation; issues related to growth, diversity, and public witness. Increase stewardship and communication to provide a foundation for this process.

2013 - Discussion of visioning begins
2014 - work on visioning with church programs and committees
2015 - visioning work continues with listening circles; vision statement is adopted
2016 - use of visioning work to create and adopt five year goals
Adopted 5-Year Goals

From 2016-2021, First Unitarian Church of Portland will:

- Focus on collaborative governance, revising policies for clarity and brevity and creating linkages between the Congregation, the Board, and the Executive Team.
- Increase church funding through enhanced giving, including goal to reduce or retire the Buchan Building mortgage.
- Make a cultural transition from program-focused church to mission-driven church, with priority to building beloved community between generations.
- Develop a long-term plan for development and sustainability of church campus given changing dynamics of West End and downtown Portland.

(Adopted May 2016)
Goal 1:
Focus on collaborative governance, revising policies for clarity and brevity and creating linkages between the Congregation, the Board, and the Executive Team.
● Why a goal on governance, policies and linkage?

● Enhancing the linkages between the Board and Executive Team with the congregation

● Policy revisions for clarity and brevity
Goal 2:

Increase Church Funding Through Enhanced Giving

Reduce or Retire Buchan Building Mortgage
I Can We Must
First Unitarian Portland
2018 Annual Fund Drive
UUA Suggested Fair-Share Contribution Guide

Adjusted Monthly Income

Regular Income plus unusual or periodic income
Subtract unusual expenses
Levels of Giving

**Supporter**: congregation significant part of spiritual & intellectual life
- ✓ 2% of my income, rising to 6% as able

**Sustainer**: congregation is my central community
- ✓ 3% of my income, rising to 7% as able

**Visionary**: demonstrates unique importance of congregation & spiritual principles
- ✓ 5% of my income and rises to 9% as able

**Transformer**: deeply committed to the congregation;
- ✓ provides fuel for transformation & living out my UU Principles
- ✓ 10% of my income
First Unitarian Church – Buchan Loan

First Unitarian Church

About $106,800 interest & principal annually FY 18

Congregants

Wells Fargo Bank
$1.613 million loan at 4.25%

About 7.3% of Annual Fund Drive donations go to mortgage interest and principal

Target return of ___%
## Buchan Loan Payments

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
<th>4.25% Interest</th>
</tr>
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<tbody>
<tr>
<td>Estimated Buchan Loan Balance (as of January 2018)</td>
<td>$1,402,374</td>
<td></td>
</tr>
<tr>
<td>Balloon Payment (due 16 April 2023)</td>
<td>$1,186,712</td>
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<tr>
<td>Budgeted Annual Interest Expense</td>
<td></td>
<td>$64,200</td>
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<tr>
<td>Budgeted Annual Principal Expense</td>
<td></td>
<td>$42,600</td>
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<tr>
<td><strong>TOTAL ANNUAL BUCHAN LOAN PAYMENT</strong></td>
<td><strong>$106,800</strong></td>
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<tr>
<td>FY’16 &amp; ’17 EXTRA PRINCIPAL PAYMENTS ON BUCHAN LOAN – FROM YR END OPERATING SURPLUSES</td>
<td></td>
<td>$44,000</td>
</tr>
<tr>
<td><strong>TOTAL EST. FINAL INTEREST PAYMENT TO WELLS FARGO (EXTRA PAYMENTS REDUCES THIS AMOUNT)</strong></td>
<td><strong>$ 578,272.17</strong></td>
<td></td>
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<tr>
<td><strong>TOTAL FINAL PRINCIPAL PAYMENT</strong></td>
<td><strong>$ 1,612,706.53</strong></td>
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Goal 3:

Make a cultural transition from program-focused church to mission-driven church, with priority to building beloved community between generations.
UUA Church Size Categories

- Family Size (0–50)
- Pastoral Size (50–150)
- Program Size (150–350)
- Corporate Size (350+)
Compartmentalized programs

- Music
- Religious Education
- Social Justice
- Leadership
- Etc.

Mission-based programs

- Music
- Religious Education
- Social Justice
- Leadership
- Etc.

Mission
Updates on this goal:

- Collaboration between Social Justice, RE, and music for the walk against hate
- Weekly program leader meetings for staff
- Pumpkin sale for DACA scholarships as a joint effort between the Alliance, Social Justice, and RE
Goal 4:

Develop a long-term plan for development and sustainability of church campus given changing dynamics of West End and downtown Portland.
Solidify our place downtown with increased parking, other services for congregants and the community.

Create a strong financial component of revenue generation and sustainability - ecologically, spiritually, and economically.

Support diversity in the West End neighborhood.
Efforts toward this goal to date:

• Gave input under Reverend Sinkford’s signature to the 2035 Portland Comprehensive Plan for West End Neighborhood.
• Named our physical facilities externally and created an inviting presence downtown.
• Adding solar panels to help with our ecological footprint.
• Collaborating with the Foundation to retire the Buchan Building mortgage.
Thank You!