Wrapping Up:
Forum on 2018 Congregational Survey Results and Review of 2017–2018 Board Activities

May 6, 2018

Updated May 25, 2018
Agenda

Welcome  1 pm
Share results of the annual survey  1:10 (20 mins)
Review 2017-2018 Board Goals  1:30 (15 mins)
Break into Conversation Circles  1:45 (25 mins)
Reports from Conversation Circles  2:10 (15 mins)
Closing  2:25 - 2:35
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.
Survey Results
Survey Basics

- Survey was developed during February and March 2018
- Open to congregants from April 12-26.
  - Final paper surveys were entered into data base on May 7
- Approximately 371 completed surveys
What is your age?
How long have you been attending services or participating in programs at First Unitarian?
Since the start of this Church year (September 2017), how often have you attended Sunday services in person?
A number of changes have been made over the last year to enhance our worship services. Please rate how meaningful these changes have been for you.
Which of the following offerings are you most drawn to help you deepen your spirituality and build community?

- One time classes: 54.49%
- Classes that meet more than once: 52.99%
- Year-long programs: 26.35%
- Retreats: 34.43%
- Ongoing covenant groups: 28.74%
What are the barriers to your participation in programs, events, and classes? Check all that apply.

Under 50

- Getting downtown
- Lack of childcare
- Other Church commitments
- Competing events outside
- Other (please specify)

All respondents

- Getting downtown
- Lack of childcare
- Other Church commitments
- Competing events outside
- Other (please specify)
Which social justice activities have you participated in this year? Please check all that apply.
Church’s Mission: Please rate how well the Church is meeting its mission with respect to... (5-point scale; 5=“Extremely well”)

- Is a welcoming and loving congregation that...
- Enhances the capacity of...
- Uses policy-based governing...
- Maintains the ongoing health...
- Is a sustainable church...
- The ministers and congregants...
- Witnesses as a voice of conscience...

Scores:
- Is a welcoming and loving congregation that...
  - 3.89
- Enhances the capacity of...
  - 4.06
- Uses policy-based governing...
  - 3.43
- Maintains the ongoing health...
  - 3.60
- Is a sustainable church...
  - 3.75
- The ministers and congregants...
  - 3.76
- Witnesses as a voice of conscience...
  - 4.23
### Mission Elements: 6-yr Trend

<table>
<thead>
<tr>
<th>Applicable Year</th>
<th>Welcoming and loving</th>
<th>Offers lifespan</th>
<th>Worship that is inspiring</th>
<th>Transparent democratic</th>
<th>Cultivates and nurtures</th>
<th>Sustainable church</th>
<th>Leadership role in the</th>
<th>Voice of conscience in</th>
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</thead>
<tbody>
<tr>
<td>2012</td>
<td>3.93</td>
<td>4.48</td>
<td>4.47</td>
<td>3.58</td>
<td>3.58</td>
<td>4.10</td>
<td>4.51</td>
<td>Data from ET Mont. Rpt</td>
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<tr>
<td>2013</td>
<td>4.18</td>
<td>4.54</td>
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<td>3.82</td>
<td>4.32</td>
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<td>2014</td>
<td>4.11</td>
<td>4.43</td>
<td>4.39</td>
<td>3.87</td>
<td>3.92</td>
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<td>2016</td>
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<td>4.29</td>
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<td>3.67</td>
<td>3.44</td>
<td>3.81</td>
<td>4.26</td>
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<tr>
<td>2017</td>
<td>3.68</td>
<td>4.10</td>
<td>4.00</td>
<td>2.74</td>
<td>3.27</td>
<td>3.06</td>
<td>3.63</td>
<td>3.82</td>
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<tr>
<td>3-Yr Avg</td>
<td>3.86</td>
<td>4.17</td>
<td>4.19</td>
<td>3.08</td>
<td>3.55</td>
<td>3.37</td>
<td>3.77</td>
<td>4.15</td>
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</tbody>
</table>

Note that Mission Elements were modified somewhat this year; Also, the response option of "no opinion" was allowed.

**2018**

<table>
<thead>
<tr>
<th></th>
<th>Welcoming and loving</th>
<th>Offers lifespan</th>
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<th>Sustainable church</th>
<th>Leadership role in the</th>
<th>Voice of conscience in</th>
<th>Approx Smpl</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>3.88</td>
<td>3.99</td>
<td>4.06</td>
<td>3.43</td>
<td>3.60</td>
<td>3.75</td>
<td>3.76</td>
<td>4.23</td>
<td>371</td>
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</tbody>
</table>

| 2018 change from 3-Yr Avg | 1% | -4% | -3% | 11% | 1% | 11% | 0% | 2% |

**Full Text of the 2018 Mission Elements**

- **Welcoming and loving community**:
  - 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.

- **Offers lifespan**:
  - Offers lifespan Worship that is inspiring

- **Worship that is inspiring**:
  - Enhances the capacity of congregants, of all ages, to engage the world and transform it, grounded in UU values

- **Transparent democratic**:
  - Uses policy-based governance and decision-making processes that are transparent, clear and easily accessible, offering opportunities for the voices of congregants to be respectfully heard.

- **Cultivates and nurtures**:
  - Maintains the ongoing health of the church community by recruiting, developing, supporting, and providing a meaningful experience for a succession of new leaders

- **Sustainable church**:
  - Is a sustainable church community in which congregants, Board, staff and ministers share stewardship of both our tangible and our human resources.

- **Leadership role in the**:
  - The ministers and congregation develop and maintain relationships with other Unitarian Universalist congregations and institutions and the local interfaith community, providing leadership in the larger Unitarian Universalist movement.

- **Voice of conscience in**:
  - 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.
Overall, on a scale from 0-100, how would you rate the “energy” or health of the Church community this year?

Average value for entire sample = 68
Board Goals
Board Goals 2017–2018

The Board Commits to:

- Complete policy revisions and get them approved for publication by the board.
- Hold three congregant discussion forums on topics including, in part, progress on our five-year goals and revising our board policies.
- Grow the financial health of First Unitarian through support of the Annual Fund Drive and efforts to reduce or eliminate the Buchan debt.
- Work on issues of Power, Privilege and White Supremacy Culture by:
  - Educating ourselves on the issues.
  - Examining the ways in which Power, Privilege and White Supremacy Culture affect our Church, including our Board work.
  - Taking steps to improve our practices.
  - Making a commitment to carry this work forward into subsequent church years.
The Board Commits to:
Complete policy revisions and get them approved for publication by the board.
The Board Commits to:
Hold three congregant discussion forums on topics including, in part, progress on our five-year goals and revising our board policies.
The Board Commits to:
Grow the financial health of First Unitarian through support of the Annual Fund Drive and efforts to reduce or eliminate the Buchan debt.
We did it – thanks to you!!

- The mortgage was paid off on April 27 = $1,350,000
- Pledges of $1,125,000
- Sale of house = $377,000
- Letter of agreement with Foundation to fully reimburse it + lost interest.
Increase church funding

- You did it again!
- Pledge goal met.
- Average pledge increased.
- Good cash flow due to Bill Pay.
- New 3 year lease with NW Academy.
Good Financial Health

- Year to date: Income $1,720,494
- Budgeted $1,672,969
- Year to date Expenses $1,581,133
- Budgeted $1,688,229
‘18 – ’19 Budget

- Increased staff salaries closer to UUA guidelines,
- More child care for meetings,
- Increased Social Justice position + permanent hire, (Welcome, Dana!)
- 10% increase in payment to UUA
The Board Commits to:
Work on issues of Power, Privilege and White Supremacy Culture by:
  Educating ourselves on the issues.
  Examining the ways in which Power, Privilege and White Supremacy Culture affect our Church, including our Board work.
  Taking steps to improve our practices.
  Making a commitment to carry this work forward into subsequent church years.
Conversation Circles
Conversation Circles

Make your comments brief so there is time for all who want to share. Share the time - be sure all who want to speak have before sharing additional comments. Speak only for yourself and respectfully.