

THE EVALUATION OF THE MINISTRY OF FIRST UNITARIAN CHURCH OF PORTLAND, OREGON, 2019-20

Conducted jointly by the Board of Trustees, Senior Minister Rev. Bill Sinkford, and Rev. Tom Disrud and Kathryn Estey of the Executive Team¹

BACKGROUND

The bylaws of First Unitarian Church, Article III, Section 5, require the Board, the Senior Minister, and the Executive Team (ET) to annually conduct a joint evaluation of the ministry of the church in reference to the church's mission and the policies enacted by the Board. The parties oriented their evaluation of the church's ministry to revolve around the three core elements of the mission statement of the church—creating community, spiritual deepening, and bringing our values to the larger community—and to consider an unnamed but assumed mission element, to perpetuate the church as an institution.

We prepare this Evaluation in a year in which three major occurrences affected the life of the church. The dramatic impacts of COVID on the church create a story of two churches: the church from July 1, 2019 through March 15th, 2020 and the church from March 15, 2020 through the end of the church year on June 30. Our previous move to live-stream worship a few years ago prepared First Unitarian well to transition to online only worship.

In addition, earlier in the year, Reverend Sinkford announced that he planned to retire at the end of the church year 2020-2021. The Board spent considerable time and energy deciding whether to have an interim year and opted to begin the search process this year. After meetings with the congregation and with assistance from the Nominating Committee, the Board appointed a Search Committee. However, in recognition of the need for continuity and the uncertainties of attempting a ministerial search in a COVID world, the Board later asked Rev. Sinkford to delay retirement one additional year and he agreed.

In May, the massive worldwide response to police murders of Black people of all genders re-ordered priorities in our justice work and reframed justice work nationally in ways we could not have predicted at the beginning of the year. Our congregational work on the culture of White supremacy and our racial justice work in our Social Justice programs has helped ground our response to the opening for change made possible by the unavoidable need for anti-racist transformation here in Portland and in the nation. In addition to substantial involvement in the protests by many congregants, First Unitarian Church was a plaintiff in a lawsuit brought to pressure the federal government to remove from Portland security personnel who inhibited the right to protest.

¹ The Board of Trustees consists of twelve voting members who are elected by the voting members of the church and the two called ministers, Senior Minister Rev. Bill Sinkford and Associate Minister Rev. Tom Disrud, who are nonvoting members of the Board. The Senior Minister names an Executive Team to manage the church operations. The Executive Team is composed of Rev. Bill Sinkford, Rev. Tom Disrud and Church Administrator, Kathryn Estey.

The parties reviewed the Executive Team’s annual report, information from the Executive Team, observations from Rev. Sinkford in response to a query from the Governance Committee about areas in which he and the Executive Team believe the church has performed well, and information from the Foundation, Nominating Committee, Alliance, and various Board Committees in preparing this evaluation. The parties elected not to conduct a congregational survey this year, in part because at the time the decision was made, we expected the Ministerial Search Committee to conduct a congregational survey and because we do not believe a yearly survey is always necessary. The parties did review the results of the congregational survey of 2019 for helpful information.

MISSION

The mission of First Unitarian Church 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. The Board believes that there is an implicit mission element—to sustain the church as an institution.

1. CREATING A WELCOMING COMMUNITY

The parties understand 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 offers them opportunities to grow spiritually once they are here. The church strives to support people on their life journey through pastoral care and one-on-one and group interactions. We seek to build the Beloved Community in the church community through a variety of group experiences, are intentional in our work to be anti-racist and multicultural, and want to ensure that the church is a safe place for everyone, particularly those who are the most vulnerable.

Community Creation and Support

Pre-COVID

The pre-COVID church offered many avenues to support community, including Sunday Worship and social hour, and adult and young people’s classes and offerings. The church also offered a Labyrinth, two libraries, and the Beacon Bookstore. Under Rev. Tom Disrud’s leadership, First Connections classes for newer and some longer-term members continued. The church offered over 20 affinity groups that supported small group connections. Examples include the UU Men’s Community, Women’s Circles, Wellspring, the Parents and Teens group, and a Caregivers Support Group.

Our younger adult ministry continued, with volunteer assistance from community minister Rev. Abigail Clauhs and some staff hours. However, that ministry remained under-resourced. To help make possible engagement by younger adult families with young children, the church did offer childcare every Sunday after worship.

The church has had traditional and important successes in being a safe and welcoming place, especially for gay and lesbian individuals and families. Welcome for the variety of gender identities and expressions continues to be a growing edge. We now regularly name pronouns, and are transitioning more bathrooms into gender neutral facilities, (though the signage remains paper at this writing). Programs for queer individuals are becoming an important part of our ministry and entry point for younger adults. The church was proud to host the city-wide Transgender Day of Remembrance Service in November 2019 and pleased to be asked to host again in 2020. The Church also hosted a community-wide Igniting Voices Performance and night market that featured the stories of transgender people from a variety of generations. The church embarked on the new Welcoming Congregation Program of the UUA.

Welcome for Black, Indigenous and POC individuals and families, not a traditional strength of the church, was enhanced by a regular gathering of BIPOC individuals, under lay leadership, and continued focus on dismantling the culture of White supremacy from the pulpit and among leadership groups.

Last year, the survey found that congregants felt very welcome and felt somewhat connected to the church. The largest difference in response was among those who were very new to the church (less than one year), who reported feeling less connected than those who had attended First Church for 5-10 years and 10 years or more.

In response, the First Connections invitations to visitors and newer members of the community were designed to enhance the church's capacity to welcome. More visible programming around racial justice and gender identity were becoming the primary entry points to the community, in addition to Family Ministries.

The Alliance of First Unitarian Church, organized in 1865 to start First Unitarian Church and which remains an affiliated organization to the church 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. The Alliance membership has grown, with 28 new members this year, including more men and a younger average age. This year the Alliance held nine luncheon programs with speakers from the church and the community, including a number of the leaders of our Social Justice programs. Average attendance at catered luncheons was 102 and 88 at brown bag luncheons.

The Alliance also enhances community by providing Memorial Service support when an Alliance member, a significant person in their family, or a person with a close connection to The Alliance dies. This year 29 members of The Alliance served on the Memorial Committee and offered services for three memorials.

Post- COVID

After the COVID crisis shut down in-person participation in church activities, the church conducted three rounds of calls to everyone in the congregation as a means of staying connected.

The first occurred in the latter half of March, the second in the latter half of May. Callers checked in on how congregants were doing pastorally, including financial hardships the church could help with and offers for one-on-one pastoral care; and asked how people were connecting to the online worship. The church conducted another round of calls in August 2020.

The church also began sending more frequent written electronic communications to congregants including regular “Staying Connected” emails from ministers and program leaders. The ministers began a weekly “Coffee Hour with the Ministers” once each week.

Some of our Adult Programming was already transitioning online. Everything abruptly moved online in March. The Zoom technology has been a blessing but Zoom has its limits. Online community has posed challenges for important elements of our community. The choirs, for whom singing together is so important, have experienced a great loss. The religious education community, especially families with younger children, have also not been well served. We have plans to address these challenges in the fall. Congregants also missed the post-service social hour. This summer the Church is experimenting with a virtual social hour on zoom.

Democratic Community

Our welcoming community is a democratic one, in which voting members call the Senior Minister, control the Articles and Bylaws, vote for the Board and Nominating Committee, and approve the annual budget and certain other items of major importance to the church.

Because we are a large church, the church uses policy-based governance in which the Executive Team and the Board work collaboratively to govern the church. The Board self-evaluation this year found unanimous agreement between the entire elected Board, the Senior Minister, and the other members of the ET that the parties worked together collaboratively in a covenantal relationship with great success.

The Board strives to be transparent and to offer opportunities for congregant input. Board meetings are open, with special exceptions, and the Board informs the congregation in advance about Board meetings and provides access to Board minutes to interested congregants. The Board, the Senior Minister, and the other members of the ET continued their efforts to improve communications with congregants. The Board held congregant forums to inform the congregation about Board activities and to get congregant input and special forums to educate the congregation and answer questions about the transition process and the Ministerial Search Committee; the Communication Committee met with a number of church groups to converse about Board work; and the Finance Committee also encouraged congregant involvement. Rev. Sinkford continued his periodic Q and A sessions with congregants, offering three this year. The Board Moderator provided a regular Moderator letter apprising congregants of what the Board was doing, and the Communications Committee responded to letters sent to the Board by congregants.

2. PROMOTE LIFELONG SPIRITUAL GROWTH

The church strives to promote love, reason and freedom in religion and to promote lifelong spiritual growth. The parties understand that this element means that First Unitarian offers opportunities, across the lifespan, for spiritual deepening, learning, and understanding grounded in love, reason and freedom in religion. Congregants last year believed very strongly that the church promotes love, reason and freedom in religion, giving it a 4.38 rating, with little apparent difference across demographic groups and identities.

Worship

Pre-COVID

Through March, the quality of worship and the wide range of programs offered in the various ministries of the church were maintained. Despite positive energy, however, worship attendance was down noticeably (-12% vs prior year). This was especially true for the 9:15 service which sometimes felt almost empty. Data from other large UU congregations indicates that we were not alone. In fact, First Unitarian continued to be the largest in-person UU congregation (measured by attendance) and has fared better than other UU congregations. Still, the declines in attendance were of real concern. So, too, were flat fund-raising results and a reduced number of individuals and families making pledges.

Although the church has lived-streamed worship for several years and online “attendance” had grown to 15%, almost all programming and ministries were in-person, relying on the space and hospitality made possible by our block-sized campus.

POST-COVID

On March 15, 2020, in response to Gov. Brown’s shut-down order, First Unitarian moved to online only worship and soon closed the campus. Initially, the closure was announced through June of 2020, but it soon was extended through June 2021.

This transition has had numerous impacts, but by far the most important to note is that when we return to in-person community life, we will not return to the church that we left. There is a new church that is emerging, the outlines of which are only now beginning to be visible.

Rev. Sinkford’s farsightedness in installing screens and live-streaming worship several years ago so that those unable to attend could view the service paid a huge dividend when COVID required church service closure. First Unitarian was well positioned to move to online only worship. We were already using the screens and live-streaming worship, we had both the hardware and the staff in-place to make the shift.

We experienced significantly increased attendance/viewership immediately. The website’s broadcast capacity was exceeded the first online only Sunday. Through June, attendance (online) grew 22% vs year ago. Online attendance measures devices connected, not humans. The conventional wisdom is that half of those devices are being watched by more than one adult.

Using that as an estimate, attendance would be considered to have doubled vs. year ago. On Easter, with almost 1200 devices tuned in, we probably had 2000 adults in attendance. Additional viewing of the services through the week can reach 50% of Sunday attendance. Most of that virtual attendance is in Metro Portland. But we have regular attendance from individuals and families in 30 states and several foreign countries.

Most congregations (UU and otherwise) that were not already live streaming found a way to use Zoom to gather in worship, with most or all of the service pre-recorded. Our worship is live, using only a few recorded elements. The “Praise Singer” quartet provides powerful live music. The quality of our online worship is consistently praised by members and visitors. Other UU churches also report increases in attendance online Post-COVID, but the extent of our online reach seems truly unusual.

Other Spiritual Growth Opportunities and Challenges

Pre-COVID

The transition from program-focused to mission-driven church was well underway this year. Program Leaders collaborate more effectively and own more of the totality of our ministry. One primary focus through the fall was the creation of more intergenerational worship. We were having some real success: the ancestry “quilt” across the front of the chancel is perhaps the best example, but the worship featuring the Rosa Parks story for both young people and then for adults in the sermon provided another model. We used the Christmas Pageant for worship on the Sunday prior to Christmas.

Discernment continued in Family Ministries. Trends away from grade-based classes and steadily decreasing numbers of young people who attend regularly, week-after-week, call many of our traditional patterns in religious education for children into question. Rethinking of curriculum, the role of chapel services and the Together Time model for the presence of young people in the sanctuary were all being questioned. Summer RE classes had already transitioned to the Chalice Camp model, which was small but well received in its first summer (2019).

Faith Development for adults continued to center on the successful and popular Wellspring Program. We had another successful Seminary for a Day, featuring Rev. Rob Hardies and programming on spiritual practice. Programs focused on identities and justice making were well attended and well-received.

Post-COVID

On March 15 Zoom became the delivery vehicle for all of our programming. Chalice Camp was cancelled for summer 2020. Despite steep learning curves, this virtual technology has worked well for adults and youth. The attempt to conduct RE classes for younger members of the community via Zoom, however, has been mixed at best.

Cassandra Scheffman is well networked with other UU religious educators. We are not the only congregation looking for effective options for ministry to families with children. During the

shutdown, additional requests for parents to be religious educators for their children felt like one more demand on parents already called to become schoolteachers as well.

Plans are in development to introduce a short Family Chapel before the 10:15 online worship every Sunday. This may well be followed by Zoom breakouts, again short. Plans are also in development for a monthly mailing (yes, physical mail) of material or a project that children (and parents) can do as time permits.

These plans are hopeful, but we will be monitoring success as the year unfolds.

3. ACT FOR SOCIAL JUSTICE

The parties interpret this mission element to require the church to offer worship, programming, service, and social justice activities that inspire congregants to take the spiritual values of Unitarian Universalism into the world outside the church in order to promote change grounded in those values.

Pre-COVID

The parties note that the church engages in social justice work in multiple ways. Many Sunday services, especially through the sermons and music, encourage congregants to bring their spiritual values into the world.

The church has been a very strong witness for conscience and justice in Portland and beyond. The church supports 11 social justice action groups, including very active Immigrant Justice, Ending Mass Incarceration/Advancing Racial Justice, Peace Action, and Community for the Earth action groups. The new Speaking of Justice newsletter is well established. The church also maintains five service programs. Our ministers are involved with these groups and Rev. Sinkford has been more visible this year in positions of public witness. Hundreds of congregants participate in these groups. The social justice leaders are working to de-silo our ministries. One example this year has been increased collaboration between social justice and adult education. Another example has been the Social Justice Council's development of a Social Justice Covenant.

The church collaborates with 25 interfaith and community partners and provides meeting space for 12 of these groups. The church also shares half of its plate collection each month with an organization in concert with our mission, more than \$50,000 in total this year. The Alliance made contributions of \$5,000 to six local charitable organizations. Rev. Sinkford was elected to the Board of Ecumenical Ministries of Oregon last year.

When asked about the church's support for social justice last year, congregants gave this category its highest rating at 4.47 out of 5.0. 53% were involved in a social justice program before last year and 17% who were not involved noted that they contributed generously to the church in significant part to financially support social justice. 45% of the congregants were involved in a social justice program last year and among those who were not, 16% contributed generously to the church to financially support its social justice program. According to the 2019 survey, almost every congregant takes their social justice values into the world outside the church by talking to others about social justice issues and working with or donating to social justice causes. The social justice program continues to be a very strong part of the church's mission and identity.

Post-COVID in the Era of Uprising

The public outrage at the police murders of Black Americans has galvanized the nation, including Portland. Black Lives Matter is the rallying cry, but it is now given voice by diverse voices on the street and even in corporate board rooms. The Uprising rejects violence toward

Indigenous and Latinx folks, the trans and gender non-binary communities, the disabled, the mentally ill and the poor.

The Uprising embodies the Beloved Community that is central to the vision of First Unitarian. Our work on the culture of White supremacy gives the church some common grounding as we engage the hope being created by the broadly shared demand for justice.

The parties believe that it is time for First Unitarian to explicitly claim an anti-racist identity. Much is already in process: a group of Black, Indigenous and POC congregants now meets regularly, convened by lay leadership; Board and congregant interest in the 8th Principle opens the possibility for programming and commitment, deepening partnerships can lead us into deeper engagement with greater spiritual depth. Even the expansion of our musical vocabulary is a resource.

Re-shaping identity is always difficult work, often controversial work. However, like our nation, it is time for us to decide whether to align ourselves with the hope for an emerging justice and real movement toward the Beloved Community.

4. SUSTAIN THE CHURCH AS AN INSTITUTION

First Unitarian is an institution that has been serving Portland for more than 150 years. Its mission is one that will not be realized in the foreseeable future but is a guiding star toward which we move. To do that, we must sustain the church as an institution.

Church's Strengths

For the first time, the Board this year requested that the Executive Team reflect on the church's institutional strengths. The Board's concern was that it is easy, looking forward, to focus on problems without taking into account the organization's strengths. Our energy, decisions, and resources should be devoted to maintaining and building on our strengths as well as fixing problems. In addition, this kind of reflection may reveal important trends that may not be apparent in a numbers-only analysis. Here is a non-exclusive list of the areas identified by the Executive Team as First Unitarian's strengths:

a. *Consistent, excellent worship.* This was perhaps the most significant reality that sustained the rapid growth during Rev. Marilyn Sewell's ministry and has also allowed First Unitarian to at least hold fairly steady despite the downward trends around us. According to Rev. Sinkford, Rev. Rebecca Parker commented the last time she preached here that our congregation pays attention to preachers because they are accustomed to hearing things from the pulpit that matter. Our community is accustomed to words, music, prayer, and silence that offer them something on Sunday morning.

Rev. Sinkford suggested that our more traditional liturgy and worship style has made First Unitarian a possible destination for more "refugees" from other mainline congregations. On the other hand, it is possible that other Portland congregations have caught up with our liberal message and that First Unitarian doesn't look and feel different enough to draw younger and more disaffected folks. Our liturgy may cut both ways.

b. *Breadth of meaning in our ministries.* The Executive Team noted that we make connections and meaning in our justice ministries, our education ministries, our music ministries, and our lay pastoral ministries, not just in worship. We have a reputation for quality in worship, justice, and education. This has allowed First Unitarian to weather changes in one area of our ministry better than systems without our breadth. Other large churches also have broad ministries, but no other large Unitarian Universalist church supports a full-time justice staff position, and none supports music nearly as generously as we do. Increasing support for education is one of the reasons resources have been so tight in recent years.

c. *Reality of delegation to the Executive Team.* Most large Unitarian Universalist congregations operate under some version of policy-based governance. According to Rev. Sinkford, First Unitarian really takes management delegation seriously. This has allowed forward-looking decision making (the screens, staff transitions, Black Lives Matter banner, changes in worship, etc.) without questions about the Senior Minister's or Executive Team's right to make those decisions. Functioning like a small church where these kinds of ministerial decisions are challenged often leads to smaller size in reality.

This delegation is particularly important when a ministry takes on controversial justice causes. Rev. Sewell's ministry pursued economic justice and Rev. Sinkford's ministry pursues racial justice. As Rev. Sinkford points out, "Prophetic justice leadership is rarely a unifying force in congregational life. And congregational vitality is rarely sustained without it." Observing the delegation of management to the Executive Team gives the Senior Minister authority to make management decisions to pursue prophetic, and at times controversial, justice work.

d. *UU Retirement Destination*. Portland remains (despite the increased cost of living) a retirement destination for Unitarian Universalists from other congregations. First Unitarian is not just drawing on the existing Portland community. These people tend to come with reasonable pledging expectations. They also are older.

Ministerial Foresight

The Board wants to acknowledge two of the ways in which Rev. Sinkford's foresight as Senior Minister has positioned the church to move toward our mission. Several years ago, Rev. Sinkford installed screens in the sanctuary and equipment that allows the church to present online worship (among other things) so that congregants who could not physically present could attend worship. The screens were controversial but Rev. Sinkford believed it was important to make worship more accessible. The ability to broadcast worship has been a "godsend" during the COVID epidemic and have allowed the church to reach far more congregants than we had reached prior to the epidemic.

Rev. Sinkford has worked patiently since the beginning of his ministry on the issue of White racism. He supported a curriculum for "Beloved Conversations" that encouraged dialogue and better understanding between congregants of color and White congregants and held a conversation about Michelle Alexander's book on Black racism that led to the formation a new social justice group to work against systemic racism. In the last several years, Rev. Sinkford has encouraged the church to consider issues about racism and White supremacy culture. (See #3 below.) As a result of this sustained and visionary work, the church is positioned to be very supportive of the emerging national movement that is challenging racism and police violence again Black people and other people of color.

White Supremacy Culture Work

Under Rev. Sinkford's leadership described above, the church has engaged in understanding how White supremacy culture pervades and weakens the church in meeting our mission elements, how it affects each of us in all our lives, and how we can work toward a more inclusive church. Rev. Sinkford has preached on the topic and supported many church offerings; Director of Social Justice Dana Buhl has provided strong leadership on this topic. The church has educated our congregation about the tremendous damage that White supremacy culture inflicts on people of color, the privileges that accrue to White people because of it, the spiritual toll that White supremacy culture exacts from all of us, and the importance of understanding how that culture works and how we can address this issue in the church and in our lives.

The Board continued its work of addressing White supremacy culture on the Board itself, largely by using process observers to reflect at the end of each meeting about how the Board operated with behaviors the Board has previously identified as supremacy/privileged behaviors and by Board reflections on this issue.

The Executive Team reports that the church's focus on White supremacy culture is named as a reason that newer, and in many cases younger, members join and get involved in the church. The education that the church has offered congregants in this area has been appreciated by many congregants. In last year's congregational survey, 60% of congregants stated that one of the areas of their life where their church connection made a difference was a better awareness of how privilege and discrimination affected them or others. 40% of congregants noted that the church's efforts to address White supremacy culture was, for them, an opportunity for spiritual growth. The YRUU reported that it held efforts to be a church welcoming to diverse individuals from all racial and class backgrounds and with diverse gender identification as a very strong value.

The church is aware that a small number of congregants see this work as a personal attack or do not see addressing racism as a spiritual matter. ~~Rev. Disrud also notes that there is some uneasiness from some gay and lesbian congregants who are experiencing a loss of focus on issues around LGBTQ discrimination. At the same time,~~ Rev. Disrud ~~also~~ notes that some younger people are joining the church in part drawn by the church's anti-racist work.

Senior Minister Transition

Rev. Bill Sinkford announced his retirement, effective June 2021. With the Senior Minister's retirement announcement, the Board asked the Nominating Committee to screen applications for the Ministerial Search Committee. The Nominating Committee coordinated with the Board's Transition Committee about the intake process and Board priorities for potential Search Committee members. Upon receipt of 44 applications, the Nominating Committee, screened the applicants, based on the Board's criteria and desired competencies. The Board spent several days reviewing the applications and the Nominating Committee's comments, then met in a day-long session to choose the Search Committee. The Search Committee was introduced to the congregation in March. In April, the Search Committee held a Zoom meeting with the congregation to report on its progress and answer questions. The Board created the Ministerial Search Committee with a number of younger members to ensure that younger people have a voice in our next ministerial candidate.

While the Board was warned that ministerial transitions are often accompanied by significant congregational anxiety, the congregation handled this stage of the transition very well. The parties opine that this may be due to several factors: (1) the early transition process meant that there was some separation between the beginning of the transition process and grief about Rev. Sinkford's leaving; (2) the Board's Communications Committee's process in the last two years of meeting with individual church groups to talk rather than relying on Board forums as the primary way to reach congregants may have increased trust in the Board; and (3) the Board's sharing of its rationale for beginning the search while Rev. Sinkford is in office seems to have been persuasive for most congregants.

As the difficulty of conducting a successful ministerial search in the coming year became increasingly apparent, Board leaders asked Rev. Sinkford to consider delaying his retirement until June 2022. With Rev. Sinkford's willingness to remain, the Board decided to postpone the active search for one year. The Search Committee will take advantage of the coming year to deepen their knowledge of the church, its history, and the demands of its ministry.

Connection to the Larger Unitarian Universalist Movement and Local Churches

Connection to the larger Unitarian Universalist movement is important to sustaining our faith. The church contributed significantly to the Unitarian Universalist Association. DeReau Farrar was elected President of the Association of UU Music Ministries. Both DeReau and Rev. Sinkford serve on the Advisory Council for BLUU (Black Lives of Unitarian Universalism). Rev. Sinkford serves on the UUMA Nominating Committee and Berry Street Lecture Committee. He continues to mentor newer colleagues and advise UUA leaders as requested. His writings continue to be quoted widely. In addition, some congregants maintain strong national UU connections and attended General Assembly. The church provided financial support to the UUA, though not at the level requested by the UUA. Though short of the Fair Share request, increasing financial support for the UUA continues to be a priority.

The church also maintains relationships with the neighboring congregations, area UU ministers and the interfaith community. Individual congregants, both ordained and lay, offer their gifts of leadership to our larger family of faith and the local religious community. Rev. Sinkford serves on the Board of Ecumenical Ministries of Oregon.

Leadership Development

Much of leadership development at First Unitarian is done by the Nominating Committee and by experience working with church groups. The Nominating Committee nominates candidates for the Board and Nominating Committee and uses this as an opportunity to encourage other kinds of leadership development for applicants who are promising but not ready for Board or Nominating Committee positions.

This year there were three open Board positions and the Nominating Committee focused on finding candidates for those Board positions. As required by the bylaws, the Nominating Committee presented a number of potential Board candidates to the Board and Executive Team for advice. The Nominating Committee then met and concluded which potential candidates to include in the candidate slate.

The Executive Team and Board understand that First Unitarian needs to support and develop new leaders. First Unitarian does this in several ways. The church held a Learning and Serving Sunday in the fall to invite congregants into service. In addition, the Wellspring program is growing, which, the church hopes, will also be a way to bring people into leadership.

Key Indicators of Church Health over Time

The Executive Team Report includes some key indicators that put the church's performance during 2019-20 related to perpetuating the church as an institution in perspective. See Appendix A below.

As noted in our 2019 Evaluation of the Ministry, these indicators generally show that the church was growing until 2016 and has shown some decline since then, with the exception of the Learning Community and the new member enrollment. This year, the Executive Team supplied data for larger Unitarian Universalist congregations. The data is Pre-COVID. The data defines the size of UU churches by their average Sunday attendance in the sanctuary and children's religious education rather than number of names in the membership book, in line with prevailing denominational belief that Sunday attendance is a better determinant of size.

Using this criteria, First Unitarian Portland is the largest Unitarian Universalist church in the country. The Board reviewed data for the next six largest Unitarian Universalist congregations. The data shows that all other large Unitarian Universalist congregations have experienced decline since 2016. First Unitarian's decline is more modest than most other churches:

- Average Sunday Attendance: First Unitarian's decline was 15%. Other churches showed declines ranging from 9% to 40%, with three of the six other churches have declines of 35 % or more.
- Number of Pledges: First Unitarian's decline was 8%. Three of the other churches showed declines of 15-20%. Two churches showed little change and one church recorded a 17% pledge growth.

The Executive Team and Board have discussed these changes. We suspect these changes may reflect larger social factors. It is unclear if and how COVID will affect this. Preliminary data from First Unitarian indicates that our Sunday attendance is much higher. Our annual fund drive in the fall may help us discern whether and how this translates into financial support. The Executive Team will continue to monitor this.

First Unitarian Church Five-Year Goals

The Board developed 5-year goals for the period 2016-21. These goals and progress toward them are described in Appendix B below.

FINDINGS

OVERVIEW

1. The parties agree that this was a church year like no other. Prior to COVID, the church continued strong, with a mission focused ministry offering many opportunities for spiritual growth, a covenanted community experience, and a very strong social justice program. Attendance was declining, but not as much as in other large UU congregations. Fundraising was relatively stable, unlike most.
2. Post COVID, attendance (on-line) has grown sharply, our worship is praised, and all programming has transitioned to Zoom format. In the short 3 ½ months since we closed our buildings, a new church is in the process of emerging.
3. The parties found that the Executive Team is in compliance with all three elements of our mission statement and with the unstated assumption that part of our mission is to perpetuate the church as an institution.
4. The parties noted that significant opportunities and challenges that we face include:
 - Revise our Music and Family Ministries to provide community, connection and spiritual nurture while we remain at a distance;
 - Sustain quality worship on-line. Sunday morning has become even more important while we are at a distance;
 - Deliver effective annual fundraising that minimizes loss of pledge income and restores reserves used in past years;
 - Encourage, or at least allow, the church that will follow COVID to emerge; that church will almost certainly be less reliant on our downtown campus, more virtual, and less geographically bound, with a national following;
 - The church needs to embrace an anti-racist identity and embody our vision of Beloved Community. The world is changing, and the church will either be vibrant in the world that is emerging or will continue to shrink;
 - With the Ministerial Transition paused, the Board can begin to focus on understanding the needs of the emerging church, addressing issues of mission and identity;
 - Planning for the development/use of our campus should be driven by the needs of the emerging church.

APPENDIX A: FIRST UNITARIAN DATA FROM 2019-2020

New Member Annual Enrollment

FY 2011	FY 2012	FY 2014	FY 2015	FY 2016	FY 2017	FY 2018	2019	2020
67	69	78	84	56	80	62	42*	46

*This figure represents 12 months, through April 2019. FY data will be updated in August.

Learning Community for Children and Youth

Learning Community Registrations reported to the UA each February 1:

	2015	2016	2017	2018	2019	2020
Total Children and Youth	422	392	398	376	389	318

Adult Faith Formation

Registration numbers include classes, workshops, retreats and special events such as Seminary for a Day and Sewell Lecture.

Total Registrations	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20
	1,315	1,001	998	1,027	1,108	947	438*	802**	1286***

* Adult Programs was in transition in 2017-18.

**Our 2018-19 figures include only formal registrations. Because most of our classes and events are now listed as “Advanced registration appreciated. Drop-ins welcome” our reported number is somewhat lower than actual attendance. In addition to the attendance at classes, workshops, special events and retreats tabulated above, our pre-COVID younger adult monthly brunches averaged 25-35 in attendance; younger adult spiritual circles meeting twice a month averaged 10-15; and First Connections classes drew 10-20 participants.

*** What makes 2019/20 different?

First, Paths to Engagement has expanded each season. Unlike in the past, we offered robust summer programming in 2019 due to increased demand. The program offerings for 19/20 exceeded those in 18/19.

Second, while we had to cancel most of our in-person programming for the spring, we held numerous one-time single events prior to COVID that brought in participation from the greater PDX community outside of the church. To name a few: JJ Mace: Black/Trans Experience through Poetry, Trans Day of Remembrance, and our culminating event Igniting Voices Performance and Night Market.

We also held seven very well attended single-day workshops and talks -- most notably, Shedding Our Stars with Holocaust Survivor, Laureen Nussbaum which had attendees from outside of the church.

Also, Seminary for a Day was a big success in 2020!

During COVID our most attended virtual class was Cultivating Gratitude and Resilience which has been offered as a weekly drop-in (4xmonth) and regularly draws around 20 people per class. We had to stop advertising due to the class size.

Music Program

Totals	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17*	2017-18	2018-19	2019-20
	281	297	298	315	301		245	212	201

*Data not available in this transition year in which DeReau Farrar was in an acting director capacity. Numbers were comparable to previous year.

Attendance

	<u>2016-17</u>	<u>2017-18</u>	<u>2018-19</u>	<u>2019-20</u>	<u>%Change</u>
1st service	12,558	11,507	11,335	6,859	
2nd Service	17,107	17,716	16,824	10,895	
Total In-Person	29,665	29,223	28,159	17,754	-37%
Live Stream	4,622	4,760	5,083	14,851	+192%
Grand Total	34,287	33,983	33,242	32,605	-2%
July thru Mid-March			23,586	20,782	-12%
Mid-March thru June			9,656	11,823	+22%

APPENDIX B: BOARD FIVE-YEAR GOALS

At the Board meeting on May 6, 2016, the Board adopted five-year goals for the church from 2016-2021.

- *Focus on collaborative governance, revising policies for clarity and brevity and creating linkages between the Congregation, the Board, and the Executive Team.*

The working relationship between Board and Executive Team continues to be strongly collaborative. The Board has been proactive in reaching out to groups throughout the church to let them know what the board has been working on and to see what questions come up. The Senior Minister has continued periodic Q and A sessions. Attendance at these sessions has been lower than last year which we interpret as a good sign in that people don't have as many questions or concerns about the state of the church. The Board adopted revised Board policies that satisfy this goal several years ago.

- *Increase church funding through enhanced giving, including the goal to reduce or retire the Buchan Building mortgage.*

The church has been challenged to meet its annual budget almost every year of its 153 years of existence. Consistent with that pattern, this year's annual fund drive was flat, short of the goal of a 3% increase. The congregation approved a budget developed just pre-COVID that relied, once again, on reserves to bring it into balance. But the use of reserves in that budget was reduced as part of a 3-year plan to end use of reserves.

Balancing the budget required voluntary salary reductions for both ministers and the church administrator, a roll-back of salary increases for Program Leaders, staff reductions in Social Justice and Music, among other belt-tightening measures.

Pre-COVID

There were many questions about financial sustainability before COVID.

Portland Homeless Family Solutions' 13 Salmon Family Center left us after many years to move into their own newly purchased facility. Plans to find productive use for the vacated space are on hold.

The mortgage has been "burned." The Foundation reports that the Burn the Mortgage campaign to date has received 92% of the pledges made and has until December 31, 2020, to receive the remainder. The Foundation provided \$69,000 in funding to FY2019-2020 Church operations and expects to provide a similar amount to our 2020-2021 church operations – but note that the amount is depending upon market performance. The Foundation received some small gifts this year, mostly in honor of Bob Schaibly.

Post-COVID

The ET continues to update Board leadership on planning assumptions for the coming years. The assumption is that pledge revenue will decrease and that rental income (other than NWA and Outside In) will be “0” in the coming year.

The church received a significant forgivable loan from the government’s PPP (Paycheck Protection Plan) Program, as well as a significant individual gift to support church operations in this period. Expenses also are reduced while we are out of our buildings. However, further expense reductions have also been necessary, including staff reductions. We continue to monitor income and will revise our forecasts as necessary.

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

See comments above in terms of challenges in Family Ministry, especially post-COVID. The Program Leaders continue to mature as a staff group which works collaboratively to further the mission of the church.

- *Develop a long-term plan for development and sustainability of church campus given changing dynamics of West End and downtown Portland.*

The City of Portland’s West End plan, which discourages downtown surface parking, will strongly impact the church if we lose the lots we currently use. In addition, the church offices and Main Street Sanctuary are very outdated, not retrofitted for an earthquake, and, in the case of the offices, noisy. In 2018, Rev. Sinkford convened a Block Development Task Force to consider alternatives for the development of the block. The Task Force presented findings of its “Phase 0” evaluation of options to the Board at the 2019-20-year end. The Task Force work will pause while the Board reviews the results and addresses the new questions of the needs for physical space by the post-COVID church that is emerging.