

THE EVALUATION OF THE MINISTRY OF FIRST UNITARIAN CHURCH OF PORTLAND, OREGON, 2020-21

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. For several years now, we have oriented our 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.

This church year began on July 1, 2020, and ended June 30, 2021 - a year in which every aspect of church life remained significantly disrupted due to the ongoing COVID-19 pandemic. Continuing local and national movements for racial justice shaped congregational focus on the emerging 8th Principle and on direct support of community-led movements for Black Lives. After Senior Minister, Bill Sinkford, agreed to postpone his transition for one year, we postponed the ministerial search process, with transition currently planned at the close of the coming church year (June 2022).

In order to conduct this assessment of the ministry of the church, we reviewed: the Executive Team's annual report (included for direct reference); narrative information from the Foundation, Nominating Committee, Ministerial Search Committee (MSC), and the Alliance; and minutes and reports of various Board Committees. We again elected not to conduct a separate congregational survey to support this year's evaluation, as the Board of Trustees engaged in extensive outreach to inform development of new three-year church goals, and the Ministerial Search Committee (MSC) conducted its delayed congregational survey to inform the search process. We reviewed and reference several elements of the MSC's congregational survey² herein.

MISSION AND COVID-ERA PRIORITIES

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 of Trustees believes that there is an additional implicit mission element—to sustain

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.

² A general note about survey data: While we often rely on congregational surveys to aid our evaluation of the ministry, we take care to hold survey data lightly. Even when we see strong survey response rates, we know that the subset of congregants who respond cannot be understood to represent the full congregation. We also hold that survey data are beginning points for further conversation and questions, rather than complete answers on their own.

the church as an institution.

Throughout the prolonged COVID-19 pandemic, the Executive Team has maintained four principal priorities for its work: sustain quality worship online; maintain bonds of community; keep congregants and staff safe from illness; and continue to be a voice for justice.

EVALUATION

1. CREATING A WELCOMING COMMUNITY

We 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 might find and shape opportunities for us each to grow spiritually together. As the church evolves, we hope to not only welcome new congregants to participate in the church that is, but to be shaped by their active presence into an emerging church — a church that is yet to become. The church strives to support people on their life journey through pastoral care and one-on-one and group interactions. The church seeks to build the Beloved Community both within and beyond the church community through a variety of group experiences. The church intentionally seeks to embody antiracist, anti-oppressive practices, intending that the church might be a place where everyone can engage fully and authentically as themselves, especially those who most frequently experience oppression elsewhere.

Similar to results of prior congregational surveys conducted by the Board of Trustees' Governance Committee, the congregational survey conducted by the Ministerial Search Committee this year found that 75% of survey respondents strongly or mostly agreed with the statement "I feel welcome at the church" (17% neither agreed nor disagreed, and only 7% mostly or strongly disagreed.). That said, only 60% strongly or mostly agreed with the statement "I feel connected to the church community," and only 39% strongly or mostly agreed with the statement "The congregation is welcoming to new people" (38% neither agreed nor disagreed, and 23% either strongly or mostly disagreed.). Similarly, only 38% of respondents strongly or mostly agreed with the statement "We choose community over individualism" (45% neither agreed nor disagreed, and 17% mostly or strongly disagreed.). The overall size of the congregation and difficulty making connections were the most frequent themes cited by respondents in open-ended response questions about things they found as obstacles and barriers to deeper engagement.

Especially in the COVID-19 era and with the Executive Team focus on maintaining bonds of community, this appears to be a space of strength, but also of continued growth for the ministry of the church.

Continued work to create a welcoming community was a primary congregational focus during this church year, as the congregation considered and ultimately adopted the 8th Principle through its incorporation alongside the other Seven Principles into the statement of purpose in the church's bylaws. The 8th Principle calls us to:

"journey toward spiritual wholeness by working to build a diverse multicultural Beloved Community by our actions that accountably dismantle racism and other oppressions in

ourselves and our institutions.”

Led by the Executive Team and guided by a small group of congregants known informally as the 8X Team, the church partnered with Paula Cole Jones, a long-time racial justice leader, congregational consultant and co-author of the 8th Principle, to hold 11 online workshops attended by over 400 congregants. These workshops allowed congregants to watch Paula Cole Jones' presentation and share in conversation about how the 8th Principle relates to and affects the existing seven. The Board of Trustees unanimously recommended its referral to the congregational ballot, where it was overwhelmingly adopted by 93% of members who voted in the annual election. In doing so, the church joins more than 100 UU congregations to have formally affirmed or adopted the 8th Principle.

While adoption of the 8th Principle was a strong affirmation of commitment to this element of the church's mission, its adoption alone does not achieve the mission. Prior even to its adoption, many communities within the broader church community - including the Board of Trustees, the Ministerial Search Committee, the Nominating Committee, the Alliance, and many of the social justice groups - had already begun active study in antiracism, discussion, and discernment as the church shifts more fully to living into the promise of and commitment to the 8th Principle. This is posed to guide the church for years to come.

In addition to continuation of several social justice groups with ongoing focus on racial justice, this church year also saw the reinvigoration of antiracism learning circles and the formation of the Beloved Community of Color, a monthly gathering of, by, and for congregants who identify as Black, Indigenous, Persons of Color, Biracial or Multiracial.

With a shift to almost exclusively virtual gatherings throughout the pandemic, the church continued several activities begun in the prior year to maintain bonds of community in spite of our inability to gather in person. Lay ministers and other volunteers led several rounds of pastoral calls to every household to check in with people. Ministerial and program leaders began communication enhancements including “Staying Connected” weekly emails, expanded use of pre-service slides to announce virtual events and classes, online “Coffee Hour with the Ministers,” and weekly zoom-based social hours following online services. The church publicized availability of Emergency Funds for congregants in need, and each ministry/program area established additional ways to keep in touch with affiliated congregants.

Even many members of the choirs, which experienced exceptional loss when they could no longer safely gather in person, were able to join in “virtual choirs,” producing individual digital recordings of their parts that were then digitally edited into full video choral recordings that became a vibrant part of several worship services. While it was far from the regathering of community that many longed for, the technology, plus hours of editing by music ministry leadership, managed to allow the choirs to make music “together” again. When respondents to the MSC's congregational survey were asked what they would like to keep or have more of, music was the most frequent response, and 82% of respondents said that music was important to First Unitarian Church - a response second only to Sunday worship services.

2. PROMOTING LIFELONG SPIRITUAL GROWTH

The church strives to promote love, reason and freedom in religion and to promote lifelong spiritual growth. We 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.

Interestingly, only 51% of respondents to the MSC congregational survey found spirituality to be important to their day-to-day life. In fact 36% of respondents said it was not at all important. Similarly, only 50% of respondents thought it was important that sermons were rich in theology and history. That said, nearly all respondents (93%) thought Sunday worship services were important to the life of the church, with 73% describing them as extremely important. More than 80% of survey respondents in the 2019 congregational survey indicated that their connection to the church community helped them (either “somewhat” or “very much”) deepen spiritually, with 60% of respondents noting that their connection to the church community made a difference in their spiritual growth. Young adults, many of whom are new to the church community and are not well represented in survey data, have also discussed the importance of finding a community in which to deepen their spiritual experience as a primary reason for coming to First Unitarian.

Eighty-nine percent of respondents thought “sermons that challenge me” were important to building trust with a future minister, and 92% thought that inspiration was an important element of sermons. Other important elements of sermons identified by respondents included “Introduces me to other perspectives/beliefs,” “Challenging,” and “Pushes me to examine my beliefs.” It seems that pathways to spiritual growth remain appropriately broad in this liberal religious community.

The Executive Team’s priority focus on sustaining quality online worship and a range of other virtual activities to foster lifelong spiritual growth required exceptional adaptability and constant reassessment of effort. Upgrades to online broadcasting technology and committed skill development among staff continued to improve online worship experiences. Though spring 2021 virtual attendance numbers for Sunday worship had decreased somewhat from the highs of 2020, online attendance remained strong, with regular attendance from visitors from 25-30 different states and multiple other countries.

By late in the church year, all youth aged 12 and over became eligible for COVID vaccines, but children under 12 were not yet eligible, making future plans for any in-person programming even more challenging. The Family Ministries team began a weekly Family Worship service recorded from the Eliot Chapel, and used monthly activities sent through mail to maintain contact with children and families in the Religious Education (RE) program. Relatively few MSC survey respondents reported having children in RE, leaving us with an incomplete picture of their experience and that of their children. The postponement of traditional age-based cohort programming in RE left many families with young children disconnected from this previously vibrant element of pre-pandemic church life. This will require significant attention in future church years in order to rebuild and/or reimagine this core component of the ministry of the church. Eighty-two percent of MSC survey respondents identified children’s religious education as an important element of congregational life, even though only 13% of respondents reported having children in RE.

The YRUU group continued to meet weekly with high-school-aged youth via Zoom, and worked collaboratively to produce an online version of the annual youth-led Sunday worship service. Seventy-two percent of MSC survey respondents identified the annual youth service as an important church tradition, ranking it even above other important traditions including the Christmas Eve service and Homecoming Sunday!

Most adult programs moved entirely online and continued to see robust participation. Several cohorts of the popular Wellspring curriculum met successfully online throughout the year, and the addition of a weekly online Lovingkindness meditation group and weekly vespers service led by our lay ministers created new opportunities for spiritual deepening. Ministers also began offering online and limited hybrid in-person/livestreamed memorial services. The annual Seminary for a Day program saw online attendance that exceeded prior years' in-person attendance.

Pre-COVID, younger adults were working to sustain regular gatherings of the Younger Adults Caucus without the presence of the intern minister who initiated the group. Younger adults met regularly for monthly brunches, spiritual circles, and other social gatherings. Virtual and outdoor gatherings of the group continued for a short time during the pandemic.

3. ACTING FOR SOCIAL JUSTICE

We 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.

In open-ended responses, MSC survey respondents strongly identified commitment to social justice as an element of church life that we would most like to keep or promote more of. In fact, it was identified almost as frequently as creating community and support of music programs. Social justice action groups and environmental justice work were identified as the fourth and fifth most important activities in congregational life (80% and 79% of respondents found them important), surpassed only by Sunday worship services, music, and children's religious education.

The church remains a strong witness for conscience and justice in Portland and beyond, supporting 11 social justice action groups, including very active Immigrant Justice, Advancing Racial Justice, Peace Action, and Community for the Earth action groups. Hundreds of congregants participate in these groups. Many Sunday services, especially through the sermons and music, encourage congregants to bring their spiritual values of social justice into the world.

Nearly all of First Unitarian's social justice action groups moved to online gatherings and continued a broad range of activities this year. The shift to online work also allowed intentional outreach to invite people into justice ministry. Action groups and individual members continued work to support the movement for Black Lives, with many engaged in street protests and direct mutual aid work in the community. The church signed on as a named plaintiff in a lawsuit filed by the Western States Center that successfully challenged the oppressive policing tactics employed by the federal government

during street protests supporting Black Lives. The closure of our campus to regular rental and church activities also allowed for its temporary use for several justice-oriented nonprofit partners, including temporary use of the Buchan building to support food pantry operations for Outside In.

The focus on discernment and eventual adoption of the 8th Principle, as well as the online flourishing of several antiracism learning circles, also helped to support broad introduction and congregational commitment to antiracist and anti-oppressive practices both within the church community and beyond. Sixty-seven percent of MSC survey respondents identified an emerging group of, by, and for congregants identifying as Black, Indigenous, and other people of color (BIPOC) as an important element of congregational life, even though 94% of respondents identified as white. That said, only 32% of respondents strongly or mostly agreed with the statement “We do a good job of having difficult conversations and staying in relationship.” While our commitment to accountably dismantle systemic oppression within and beyond our congregation is solid, we will need to strengthen our practices of supporting each other in this sacred work.

4. SUSTAINING 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.

Our welcoming community is a democratic one, in which voting members call the Senior Minister, control the Articles and Bylaws, vote for the Board of Trustees 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 a modified form of policy-based governance in which the Executive Team and the Board work collaboratively to govern the church. The Board and Executive Team frequently cite their covenantal relationship in the leadership of the church as one of the primary factors in our ability to achieve the mission of the church’s ministry.

The Board strives to be transparent and to offer opportunities for congregant input. Board meetings moved entirely online, but remained open to congregants, with special exceptions. The Board continued to inform the congregation in advance about Board meetings and provides access to Board minutes via the church website.

The Board, the Senior Minister, and the other members of the ET continued their efforts to improve communications with congregants. The Board held online congregant forums to inform the congregation about Board activities and the Communication Committee worked to gain congregant input to shape development of new three-year church goals (to be finalized in the 2021-22 church year). The Finance Committee also encouraged ongoing congregant involvement. The Board Moderator continued regular Moderator letters to increase congregant awareness of Board actions.

Seventy-eight percent of respondents to the MSC survey either mostly or strongly agreed with the statement “I have a high level of trust in the leadership of this congregation,” but fewer (61%) agreed

with the statement “I feel confident about our congregation’s financial stability.” Nearly all respondents said transparency about church operations (93%) and the financial health of the church (81%) were important to building trust with a minister.

The shift away from in-person worship and programming created a great deal of uncertainty regarding the church’s projected income and expenses. The Executive Team had to significantly reforecast the pre-COVID budget adopted by the Board of Trustees and congregation early in the year. Their reforecast was carefully reviewed by the Finance Committee and the Board and has been used to review financial performance.

Steep declines in rental revenue and minimal use of the church’s physical plant led to staffing shifts away from support of a physical church to technology investments and staff support of a virtual church. A forgivable loan from the federal Paycheck Protection Program allowed the church to retain most staff, especially early in the church year, an entirely virtual fund drive exceeded its goals, and several generous one-time gifts from church community members helped revenue to exceed reforecast amounts. Separately, the Foundation distributed about \$72,000 to the church, received several new estate gifts, and added four new Legacy Society members. The sustained income, combined with prudent cost-controls enacted by the Executive Team, allowed the church to end its fiscal year in the black without drawing on fiscal reserves as anticipated. The fiscal management of the church through this uncertain time was extraordinary, though many future questions remain regarding ongoing fiscal sustainability of the institution.

Throughout the pandemic the Executive Team maintained congregant and staff safety from illness as a top priority. The Executive Team closely monitored state and local public health guidance, shifting all church activities, including its administrative activities online whenever possible and enacting workplace distancing and quarantine protocols when necessary. The Executive Team also assembled a volunteer Public Health Task Force, made up of congregants who are practicing and retired medical and public health professionals. The task force continues to meet regularly to interpret broader guidance to help shape church operations, especially as we look with hope toward the many uncertainties of returning to in-person worship and programming as vaccines become widely available and the pandemic begins to recede. Our congregation is indebted to the taskforce for bringing such knowledge, care, and concern to their work on our collective behalf.

The coming church year will mark a significant milestone in sustaining the church as an institution: the calling of a new senior minister. Amidst the deep uncertainty posed by COVID-19, Senior Minister Bill Sinkford agreed to postpone his planned retirement, allowing a one-year postponement of the ministerial search that would have otherwise occurred within this church year. The deeply committed Ministerial Search Committee formed in the prior church year, continued to meet, deepening their relationship and continuing to plan and prepare with their work that will continue in the year to come.

SUMMARY

In spite of great uncertainty posed by the continuing challenges of the COVID-19 pandemic, First Unitarian Church of Portland continued throughout the past church year to admirably meet its ongoing mission. The extraordinary leadership and adaptability of the Executive Team, staff, and congregants alike helped to facilitate a temporary transition to a largely “virtual” church - a vibrant and welcoming faith community that for more than a year now has rarely convened in person, but that has nonetheless continued to foster lifelong spiritual growth and to act for justice. Much remains unknown regarding our greatly anticipated return to in-person programming and worship, as well as for our transition in ministerial leadership. The church that we were pre-pandemic is unlikely to return, and the church that we will become is yet emerging. At its core, though, the church’s mission and our collective dedication to achieving it remains strong. Love calls us on. We continue in faithful community.

The background features abstract, overlapping geometric shapes in various shades of green, ranging from light lime to dark forest green. The shapes are primarily triangles and polygons, creating a dynamic, layered effect. The text is centered in a clean, sans-serif font.

Highlights: Congregational Survey and Evaluation of Ministry

Purpose and Framing

- ▶ Bylaws require annual joint Board/ET evaluation of ministry
- ▶ 2020-2021 Church Year
- ▶ Four focus areas, drawn from mission:
 - ▶ Create a welcoming community of diverse individuals
 - ▶ Foster lifelong spiritual growth
 - ▶ Act for social justice
 - ▶ [Sustain the church as an institution]
- ▶ ET COVID-era priorities
 - ▶ Sustain quality worship online
 - ▶ Maintain bonds of community
 - ▶ Keep congregants and staff safe from illness
 - ▶ Continue to be a voice for justice

Background sources

- ▶ Primary sources:
 - ▶ ET annual report
 - ▶ Narratives from Foundation, NomComm, MSC, and Alliance
 - ▶ Meeting materials and minutes
 - ▶ MSC congregational survey results

Evaluation Highlights: Creating a Welcoming Community

- ▶ Deep congregational engagement with and eventual adoption of 8th Principle
- ▶ Antiracism learning circles and Beloved Community of Color
- ▶ Maintaining connections, without in-person gathering:
 - ▶ Pastoral calls
 - ▶ “Staying Connected” emails
 - ▶ “Coffee Hour with the Ministers” and zoom social hours
 - ▶ Virtual choirs

Evaluation Highlights: Creating a Welcoming Community

- ▶ From MSC survey:
 - ▶ 75% agreed “I feel welcome at the church”
 - ▶ 60% agreed “I feel connected to the church community”
 - ▶ 39% agreed “The congregation is welcoming to new people”
 - ▶ 38% agreed “We choose community over individualism”
 - ▶ Difficulty making connections and size of congregation remains barrier to engagement

Evaluation Highlights: Promoting Lifelong Spiritual Growth

- ▶ Sunday worship services important to life of church (93% of MSC survey)
- ▶ ET focus on maintaining high quality online worship experience
- ▶ Family Ministries shift to Family Worship and mailed activities
- ▶ YRUU online, with annual youth service
- ▶ Robust online participation in adult programs:
 - ▶ Wellspring
 - ▶ Vespers service
 - ▶ Lovingkindness meditation
 - ▶ Seminary for a Day
 - ▶ Online and hybrid memorial services

Evaluation Highlights: Promoting Lifelong Spiritual Growth

- ▶ From MSC survey:
 - ▶ Only 51% found spirituality important to daily life (36% not at all)
 - ▶ Sermons that challenge or inspire more important than rich in theology/history
 - ▶ 82% identify RE as important part of congregational life, even though only 13% had kids in RE
 - ▶ Annual youth service more important church tradition than Christmas Eve or Homecoming Sunday

Evaluation Highlights: Acting for Social Justice

- ▶ 11 active social justice groups continued online with intentional outreach
- ▶ Continued support for movement for Black Lives, protests and mutual aid
- ▶ Named plaintiff in Western States Center lawsuit challenging federal policing
- ▶ Temporary campus use for social justice partners
- ▶ From MSC survey:
 - ▶ Social justice action groups and environmental justice surpassed only by Sunday services, music, RE as important elements of congregational life
 - ▶ 67% identified Beloved Community of Color as important element of congregational life, though 94% of respondents identify as white
 - ▶ Only 32% agree “We do a good job of having difficult conversations and staying in relationship”

Evaluation Highlights: [Sustain Church as Institution]

- ▶ Core strength of covenantal policy-based governance
- ▶ Board transparency and congregational outreach (especially for church goals)
- ▶ Excellent financial management through uncertainty of COVID
 - ▶ PPP loan
 - ▶ Shifts in staffing
 - ▶ Fund drive exceeded goals
 - ▶ Finished in the black with no reserves
- ▶ Public health team and focus on safety
- ▶ Delayed ministerial transition and continuing work of MSC

Evaluation Highlights: [Sustain Church as Institution]

- ▶ From MSC survey:
 - ▶ 78% agree “I have a high level of trust in the leadership of this congregation”
 - ▶ 61% agreed “I feel confident about our congregation’s financial stability”
 - ▶ Important to building trust with a new minister:
 - ▶ Transparency about church operations (93%)
 - ▶ Financial health of the church (81%)

Generative Discussion: Retrospective Questions

- ▶ What major themes within the evaluation resonated for you?
- ▶ Were there any findings that surprised you?
- ▶ Were there findings that you think we could understand or express differently, or that you'd like us to explore more together in conversation tonight?
- ▶ Are there significant errors or omissions that we need to correct before calling the evaluation final?

Generative Discussion: Prospective Questions

- ▶ What strengths of the ministry of the church can we continue to draw on during this church year and beyond?
- ▶ What are areas of concern to which we should give additional focus?
- ▶ How does the 8th Principle call us to change how we evaluate our ministry?