

First Unitarian Church of Portland
Board of Trustees Meeting – June 2, 2022 – Agenda
Board (only) Deepening 6:00, Board Meeting - 7 - 9pm - Zoom call – link

In-person: Buchan reception

Via Zoom:

<https://us02web.zoom.us/j/82930223125?pwd=TDdrckx1T0lSTG1KT3BFWGx5MmQyZz09>

Meeting ID: 829 3022 3125

Passcode: 398649

One tap mobile: +12532158782,82930223125# US (Tacoma)

Board Meeting

6:00 Dinner /Check-in/ Deepening

7:00 **Convene**

Opening Words – Leila
Determine Quorum
Process Observer Review
Review Agenda
Review and Approve Previous Meeting Minutes

Board Roles

Timekeeper – Barbara
Process Observer – BLT

7:05 **Congregant Comment Period**

7:15 **Updates**

- Committee updates – reports/minutes attached
- Register for GA – good to have church leaders at GA

Dates to Calendar

- 6/12/22 – counting vote for Emeritus status for Bill
- 6/17/22 at 7:00 – Board dessert

ET Update

7:40 **Consent Agenda**

- Certify vote for Senior Minister call
- Certify vote for the annual ballot
- Approve Board Officers for 2022-2023
 - Moderator – Ryan Deibert
 - Treasurer – Andy Wilson
 - Secretary – Mindy Clark
 - Com Com Chair/First Vice Moderator – Theo Harper
 - Gov Com Chair/Second Vice Moderator – Caitlynn Hill

- BLT Chairs – Marilyn Mays & Caitlynn Hill
- Approve contract with Susan Matlock Jones & Assoc. for accounting/bookkeeping services (see attached)

7:45 **Generative Discussion**

- Evaluation of Ministry (see attached) – Gov Com

8:45 **Meeting Wrap-up**
 Closing comments, items for future agendas
 Communications Check
 Process Observations
 Closing Words – Leila

9:00 Adjourn

Our Mission:

The mission of First Unitarian Portland 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.

Our Vision:

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

Church Goals 2021-2024

As we work to embrace our call as a justice-seeking community in the emerging post-pandemic era, we recognize the unique value First Unitarian Church and liberal religion bring to Portland and the larger community. We will:

1. "Continue, and enhance as we are able, our vibrant ministries in worship, music, adult and young people's spiritual education, and social justice."
2. Successfully complete the ministerial transition and establish covenantal relationships among the new minister, the congregation, staff, and Board.
3. Take the next steps toward living into the 8th Principle by examining all parts of the church structure to ensure we are accountably creating a multicultural and anti-racist environment where each person is welcomed and finds connection.
4. Create a long-term plan for development and sustainability of the church campus given congregational needs and resources, community needs, and the evolving dynamics of downtown Portland.

5. Enhance and promote an ever-growing culture of generosity and financial sustainability.

Board Goals for 2021/24

1. Take action to improve our practices and model antiracist behavior as called for in the 8th principle. Continue to educate ourselves on the issues so that we can support the development of this work in with the congregation.
2. Holding the mission of the church, engage in ongoing, generative conversations with the Executive Team and the congregation to:
 - a) Develop an understanding of the post-pandemic church that's emerging, as well as the pastoral needs and continuing connections among congregants.
 - b) Approve a revenue plan to sustain the mission of the church during this evolving period.
 - c) Consider viable options for maintenance of our current physical plant and future development of the campus as is feasible.
3. Continue to support the Ministerial Search Committee and the transition to a new Senior Minister.
4. Develop and nurture a covenantal relationship with the new Senior Minister.
5. Consider the appropriate size for the board and, if a change is decided upon, refer a recommendation to the congregation for a vote.

Proposed Charge for First Unitarian Portland Transformation Team February 1, 2022

Transforming our congregation into one which does not only enthusiastically adopt the 8th Principle, but which also accountably embodies it, will require deep reflection, concerted effort and sustained commitment. For that reason, we are instituting a Transformation Team (TT) whose charge is to initiate and guide this important process. The TT will serve as a visioning and research group, as well as a central hub of learning and information, toward the realization of our congregation's desire to live into the 8th Principle. The TT will comprise 8-10 church members who are committed to the implementation of the 8th Principle and to a vision of Beloved Community, as well as being currently engaged with ministries/communities that they can represent and to whom they will remain accountable. Formation of the team begins in Spring of 2022. An assessment and recommendation for ongoing ways to live into the 8th Principle should be made to the congregation by June 2025.

**First Unitarian Church of Portland Board of Trustees Meeting
May 5, 2022 held via Zoom**

Board Members present: Alan Comnes, Cindy Cumfer, Ryan Deibert, Theo Harper, Caitlynn Hill, Adam House, Andy Wilson, Ameena Amdahl-Mason, Marilyn Mays, Mindy Clark

Board Members Absent: Barbara Morrison, Leila Wrathall

Ministers and Staff Present: Rev. Tom Disrud, Kathryn Estey, Carter Smith

Congregants present: Steven Storla (Nominating Committee)

Convened at 7:09 am

Opening Words

Determine Quorum - there is one

Process Observer Review - none

Review Agenda

- Caitlynn to take notes in June

Timekeeper – Theo

Process Observer – BLT

Reminders:

- Register for GA – good to have church leaders at GA - reach out to Bill Pryor and/or Stan Jewett
- Carter is doing a worship service about the GA experience in July - reach out to her
- Is Portland GA a seven-year itch?
- Ware lecture: Ibram X. Kendi

Dates to Calendar

- 5/15/22, 4:00-6:00 – Board gathering with Rev. Alison Miller (Barbara is coordinating food), Mindy will circulate some philosophical questions
- 5/22/22 – counting votes to call Rev. Miller - Ameena, Adam, Caitlynn, Ryan, Theo, Marilyn
- 5/29/22 – counting votes for annual ballot - Ameena, Cindy, Mindy, Caitlynn (comment on ballots will be distributed to the Board only)
- Friday, June 17 - Board dessert at 7 pm

ET Update

- Candidating week is coming up. Ballots are out. Most events are hybrid.
- Attendance is slowly coming back. Easter Sunday felt more like back to church as it used to feel.

- Bill spoke to the Alliance yesterday. Bill's final weeks, plans for celebration underway
- Bill's last Sunday is June 12
- Release of call on June 19
- NW Academy's security guard was attacked this morning and has a broken nose and pallet.
- Dana and Bill signed on to a coalition called "Here Together," a comprehensive responsive to houselessness in Portland, support for housing, social service providers, support for money to supplement housing
- Carter and Bill blogged about the Supreme Court leak
- Deeper grounding will have to come out of communities like this one
- GA - we have a ton of volunteers who will be helping

Review and Approve Previous Meeting Minutes (motion: Marilyn, second: Adam, approved unanimously)

Congregant Comment Period: Steve is pleased with the slate, likes hybrid format, Nom Comm will have a retreat later to review their year

Consent Agenda (motion: Ryan, second: Andy, approved unanimously)

- Approve charter for the 8th Principle Transition Team

Generative Discussion - Closed Session (started at 7:33)

Board self-evaluation

Closed session ended at 8:57 pm

Meeting Wrap-up

Closing comments, items for future agendas

- next up, evaluation of the ministry

Communications Check

Process Observations

- people managed to speak up

Closing Words

9:00 Adjourned

GOVERNANCE COMMITTEE MINUTES

Chair: Ryan Deibert

Committee Members: Mindy Clark, Cindy Cumfer, Caitlynn Hill, Adam House

DATE AND PLACE: Wednesday, May 11, 2022, 7-9 p.m.

Light Virtual Chalice

Opening Words—Mindy - **Luellin VonLeigh (sp?) - *The Light***

Check-in and Announcements

Acceptance of [Last Meetings Minutes](#) - **accepted**

Review agenda: Additions/Changes? - **none**

Agenda Items:

1. **Debrief and next steps: board self-evaluation**
 - a. **Debrief:**
 - i. **In person**
 - ii. **Rich discussion; more valuable and deeper than in the past**
 - iii. **Built rapport with each other**
 - iv. **Well lead/framed discussion**
 1. **Space between speakers**
 - v. **Members were open and willing to discuss**
 - b. **Next Steps:**
 - i. **Summary of the notes with themes, important points, etc. - at the board retreat?**
 1. **What have we done well?**
 2. **What are our growing edges?**
 3. **What do we want to bring forward in our work next year?**
 - ii. **Caitlynn to reach out to Ameena for notes; collect other notes from folks - create a summary**
2. **Two policy questions for consideration:**
 - a. **Alternative means to confer emeritus status on Bill**
 - i. **Annual ballot is missing item to confer Rev. Bill Emeritus status**

1. Exploring the board conferring that (would be a change in policy)
 - a. Possible language from the UUA (Mindy).
 - b. Where would we insert it?
 - c. How would we do it?
 - i. We could call a congregational meeting (on the 19th [release of call])
 - d. Can we wait a year?
 - i. That can be more appropriate for a smaller congregation (having to say goodbye to Bill; may interfere with Rev. Alison's work)
 - e. Survey monkey for the members to vote
 - i. Do we need to change a policy to vote electronically?
 1. Mindy to reach out to Kathryn to find out how many emails we have for congregant's v how many we need for the vote.
 - a. CC the group
 - ii. An in-person meeting/vote and an electronic vote? 150-200 members for a quorum
 - iii. Would need notice sent out 21 days before and an answer by the June 19th
 - f. Take a board vote and contact members
 - i. Make an announcement and invite members to offer support/comment
 - ii. Hold a special meeting for board vote in an extra board meeting
 - g. Announce the vote to confer at the release of call.
 - b. (For next year) Clearer policy/process for developing board leadership slate
 - i. **Increased transparency about the process**
 - ii. **Nominating committee for leadership?**
 - iii. **Need to carry this conversation to next year.**
3. **Next steps to finalize evaluation of ministry**
 - a. Review congregational survey response, plan to frame
 - i. **About 50 responses - mostly 70s and greater**
 - b. Reflections on ET report
 - c. Assessments from other groups
 - d. Final process for compiling and authoring
4. **Process Observation:** (comments by all)

Closing Words—Mindy

FIRST UNITARIAN CHURCH OF PORTLAND
BOARD OF TRUSTEES
Communications Committee Meeting Minutes
May 10, 2022

The meeting convened via Zoom at 6:30PM

Present: Theo Harper (Chair), Barbara Morrison, Ameena Amdahl Mason, Alan Comnes,
Mindy Clark

Meeting called to order

Reading: Mindy

The April minutes were approved as written

Moderator letter ideas:

Where we are in the procedural process with Alison

Information about the vote to confirm Alison and annual vote (emeritus title for Bill
accidentally left off the ballot.)

Carter will be our summer minister.

We did a board self-evaluation.

Ideas for next year's Board committees:

Suggestion for new Board members to take on secretarial duties for committees

Leslie Pohl Kosba will be encouraged to join ComCom.

How to form next year's committee? Assign or volunteer

How to encourage young people in the congregation to attend committee meetings.

We need media savvy people to help out. Put out a call now or wait.

Training for our new Board members:

Mandatory orientation sessions for new members?

Need for refreshing paybook of training-Barbara.

Should we have 4 members per committee?

How to handle committee files:

Discussion about best way to locate documents and where to store-Alan.

Need for “naming convention” for files.

Chairs should be checking their own documents.

When should minutes be sent out.

Should we try something like Basecamp or Slack-get training over the summer and before our retreat in July or August-Mindy.

Training needed for Google Docs that could be recorded on Zoom-Alan.

Reading: Mindy

Meeting adjourned at 8:10pm

Submitted by Barbara Morrison

**First Unitarian Church
Portland Oregon
Finance Committee Minutes
05/24/22 5:00pm**

Attending Board of Directors committee members: Leila Wrathall, Mindy Clark
Committee members and Congregants: Ed McClaran, Jo Ann Foor, Stan Jewitt
Staff: Kathryn Estey, Zaida Cooper, Erin Tafuri (latter half)

Call to Order at 5pm

Opening words from Leila:
{Thich Nhat Hanh, Message on Anxiety}

Agenda reviewed by Leila Wrathall

M/S/C approval of April minutes with addition re: 13 Salmon Street: [Post-meeting Note: any plan to spend this money is to be run by Committee on Hunger and Homelessness to assure that they are in agreement.]

Update re: LYBUNTS

RE: survey of Last Year But Not This Year (LYBUNTS), Andy Wilson has been working with Erin on some modifications to the survey, and ET on best way to disseminate it. It should go out soon.

ET update (Kathryn, Zaida)

- Contract negotiations with union – will be having mediation soon with Federal Mediator.
- Zaida is retiring July 31, 2022. Erin Tafuri has been interested in moving into Zaida’s position however does not have accounting background. She will be training for next year. To handle this transition, the Accounting Advisory Committee recommended hiring a bookkeeping service for the next year. Susan Matlock Jones submitted a proposal; cost is slightly less than \$32K. Staff thought she would do a good job and were comfortable with her. If Board approves proposal, there will be up to \$2,000 startup costs to get things set up. This will be funded out of available funds from this FY budget. They would start setting up in June.
- April financials contain few surprises. Some operating expenses are higher because the building is occupied this year and more programs are happening. Decrease in actual building staff time from what was budgeted. Haven’t had to use any budgeted reserves so far. Plate income is down, but Foundation contribution is higher. Balances out.
- Staff transitions, accounting changes
 - ¼ time data entry person to assist Erin will start at end of May.
- Revenue and expenses from the “Ruby Bridges” social justice event were good. The difference will be paid from the Sewell Lecture program designated fund. This is a good

result.

- Sewell Lecture fund is down about \$27K due to stock market downturn.
- The Sinkford Scholarship Fund has already raised about \$150K in contributions. A check for the balance of actual receipts, about \$128K—not including pledges not in hand--will be paid to the UUA before GA, at Rev. Bill's retirement.

M/S/C to recommend that Board approve proposal from Susan Matlock Jones to provide book keeping services for the Church.

Closing Words (ATW)

{Emily Dickenson, "If I Can Stop One Heart from Breaking"}

Next meeting (if needed)

6/28/2022, 5-6:30pm PDT

Meeting adjourned at 6:25

Submitted by LW

st Unitarian Church
ar-To-Date Summary
r the 10 periods ending April 30, 2022
erating Fund

	ACTUAL OPERATIONS YEAR TO DATE 30-Apr-22	ACTUAL OPERATIONS YEAR TO DATE 30-Apr-21	ACTUAL VARIANCE FY 2022 TO 2021	BUDGET YTD 30-Apr-22	BUDGET VARIANCE 30-Apr-22	ANNUAL BUDGET FY22
urch Operations						
Operating Income						
Pledge Income - 2020	-	607,597	(607,597)	-	-	
Pledge Income - 2021	679,750	701,392	(21,642)	672,334	7,416	641,622
Pledge Income - 2022	700,496	(49)	700,545	620,256	80,240	832,573
Contributions	70,707	93,596	(22,889)	85,000	(14,293)	102,000
Program Income	33,215	55,879	(22,664)	37,083	(3,868)	43,000
Rental Income	288,170	301,217	(13,047)	282,110	6,060	336,632
Other Income	4,868	5,131	(263)	2,083	2,785	2,500
Special Donation	62,500	21,000	41,500	-	62,500	
Transfer from Foundation	-	72,890	(72,890)	73,000	(73,000)	73,000
Total Operating Income	1,839,707	1,858,652	(18,946)	1,771,867	67,840	2,031,326
Operating Costs						
Payroll Expenses	1,237,641	1,241,356	(3,715)	1,301,737	(64,095)	1,564,313
Reimbursible Expenses	-	5,636	(5,636)	-	-	
Occupancy Expense	167,559	135,652	31,907	170,333	(2,774)	204,400
Program Expense	150,031	114,462	35,569	164,778	(14,747)	244,868
Rental Expense	3,511	3,747	(236)	3,767	(256)	4,520
Administration Expense	51,021	54,636	(3,615)	52,625	(1,604)	63,150
Other Expense	312	-	312	1,167	(855)	1,400
Total Operating Costs	1,610,075	1,555,489	54,586	1,694,407	(84,331)	2,082,651
t Church Operations	229,632	303,163	(73,532)	77,460	152,171	-51,325
Reserve Account Deposits						
Annual Operating Reserve	33,856	35,778	(1,922)	33,856	-	40,627
Total Reserve Deposits	33,856	35,778	(1,922)	33,856	-	40,627
t Church Operations After Reserve Deposits	195,776	267,385	(71,609)	43,605	152,171	-91,952
vestment Income						
Net Property Income (Expense)	-	-	-	-	-	
Dividend & Interest Income	1,611	2,044	(433)	-	1,611	
Realized Stock Gain (Loss)	-	-	-	-	-	
Unrealized Stock Gain (Loss)	-	(475)	475	-	-	
t Investment Income (Loss)	1,611	1,570	42	-	1,611	
erating Surplus (Deficit)	197,387	268,955	(71,568)	43,605	153,782	
Reserve Account Transfers						
Justice Begins At Home	0	0	0	0	0	14,311
Hessler-Deale Women in Ministry	0	0	0	0	0	2,000
Anniversary Fund OnPoint	0	0	0	0	0	2,500
Major Donor Reserve	0	0	0	0	0	29,527
Tax Rebate -Ministers/Staff Transitions	0	0	0	0	0	28,614
Total Reserve Deposits	0	0	0	0	0	91,952
t Church Operations After Reserve Deposits	197,387	268,955	(71,568)	43,605	153,782	0
Special Donation (unbudgeted)	(62,500)	\$ (21,000)				
Reimbursible Expenses		\$ 5,636				
t Cash Effect - Operating	134,887	253,591	(71,568)	\$ 43,605	153,782	
PPP funding	275,421					
justed Net Cash Effect with PPP Funding	410,308					

First Unitarian Church
Monthly Operating Summary
For the 10 periods ending April 30, 2022
Operating Fund

	ACTUAL OPERATIONS CURRENT MONTH	ACTUAL OPERATIONS PREVIOUS MONTH	OPERATIONS MO to MO VARIANCE	BUDGET CURRENT MONTH	BUDGET VARIANCE
Church Operations					
Operating Income					
Pledge Income - 2021	100	2,429	(2,329)	67,233	(67,133)
Pledge Income - 2022	98,591	139,671	(41,080)	90,802	7,789
Contributions	6,496	3,716	2,780	8,500	(2,004)
Program Income	4,513	930	3,583	2,958	1,555
Rental Income	27,642	27,642	-	27,261	381
Other Income	-	295	(295)	208	(208)
Transfer from Foundation	-	-	-	73,000	(73,000)
Total Operating Income	137,343	174,683	(37,340)	269,963	(132,620)
Operating Costs					
Payroll Expenses	131,444	126,112	5,331	130,112	1,332
Occupancy Expense	22,864	14,521	8,343	17,033	5,830
Program Expense	19,664	22,237	(2,573)	17,144	2,519
Rental Expense	238	600	(363)	377	(139)
Administration Expense	4,037	6,639	(2,602)	5,263	(1,225)
Interest Expense	-	-	-	-	-
Other Expense	-	312	(312)	117	(117)
Total Operating Costs	178,246	170,422	7,824	170,045	8,201
Net Church Operations	(40,903)	4,261	(45,164)	99,918	(140,821)
Reserve Account Deposits					
Annual Operating Reserve	3,386	3,386	-	3,386	-
Total Reserve Deposits	3,386	3,386	-	3,386	-
Net Church Operations After Reserve Deposits	(44,289)	875	(45,164)	96,532	(140,821)
Investment Income					
Dividend & Interest Income	191	198	(7)	-	191
Net Investment Income (Loss)	191	198	(7)	-	191
Operating Surplus (Deficit)	(44,097)	1,073	(45,171)	96,532	(140,630)
Reserve Account Transfers					
SJ Fundraiser	-	-	-	-	-
Campus Ministry	-	-	-	-	-
Special Donations	0	0	0	0	0
Speaker Fund	0	0	0	0	0
Ostroff fund	0	0	0	0	0
Anniversary Fund	0	0	0	0	0
Total Reserve Deposits	0	0	0	0	0
Net Church Operations After Reserve Deposits	(44,097)	1,073	(45,171)	96,532	(140,630)

First Unitarian Church						
Dashboard Report						
April 2022						
CAMPAIGN MONTHLY TRACKING						
**FOR REVISION						
Attendance	Apr 22	Apr 21		Apr-20	Apr-19	
For the month (in sanctuary + livestream)	2,400	2,341	2.52%	3,641	3,376	
Total LiveStream (included above)	1,459	2,341	-37.68%	3,641	438	
Total for the Fiscal Year	19,372	25,829	-25.00%	27,537	25,594	
Average per Sunday for month	600	585	2.52%	910	844	
Average per Sunday YTD	451	601	-25.00%	656	609	
** = 5-Sunday month	**Easter included	**Easter included		**Easter included	**Easter included	
Christmas Eve/Solstice (Livestream)	810	1,005				
New Members	Jul '21 -Jun'22		Jul 20 - Jun '21			
Enrolled	14	-36.36%	22		-	
Number of Pledges Received	9	-30.77%	13			
Total Amount of Pledges Received	11,200	27.56%	8,780			
Average Pledge	2,800	314.58%	675			
Plate Contributions	FY22	Recipient(s)		FY22	Recipient(s)	
	Jul	1,353	Black & Beyond Binary Collaborative	Jan	3,933	Religious Coalition for Repro Choice
	Aug	2,015	Various UU groups	Feb	1,832	Black Food Sovereignty Coalition
	Sep	3,072	GCCLP; SOAR	Mar	3,100	Bark, Lutheran Comm Sev NW
	Oct	2,047	Honor the Earth	Apr	2,433	Braided River Campaign
	Nov	2,170	Immigrant Mutual Aid Coalition	May		
	Dec	3,451	Seeding Justice; Outside In	Jun		
				Fiscal YTD	25,406	
Aug 2021 recipients						
TRUUsT (Transgender Religious Professional UUs Together)		794				
AUUMM (Assn for UU Music Ministries)		437				
UU-UNO (Office of the United Nations)		437				
DRUUMM (Diverse & Revolutionary UU Multicultural Ministri		346				

First Unitarian Church			
Notes to Financials April 2022 (department transactions greater than \$2,000)			
OPERATING INCOME			
Pledge income	YTD pledge income above budget		87,656
	Month pledge income below budget		(59,344)
Non-pledge contributions	YTD receipts below on budget		(14,293)
	Month receipts below budget		(4,784)
Rental Income			
Tenants			27,342
Adult Programs			
Men's Retreat	to be held in June		3,300
OPERATING COSTS			
Occupancy			
Repairs & Maintenance			6,057
Utilities			5,914
Contract services			5,714
Parking	Mar & April		4,000
Music	Easter orchestra		3,300
Ministry	Professional expenses		3,219
DASHBOARD			
New members			5
New pledges received			4
CASH/SECURITIES BALANCE			
Sewell Lecture Series	investment loss (from stock market activities)		(27,457)
	Ruby Bridges Recap		
	Tickets sales		11,330
	Expenses		(17,136)
	Expenses covered by SLS		(5,806)
Sinkford Scholarship Fund	transferred from Beneficial Checking to Restricted Acct		52,300
	April receipt to be transferred in May		76,306
		Total receipts	128,606
Fund 49 (Designated)	Active Accounts		Account Balance
Auction			10,840
YRUU		balance as of 3.31.22	20,735
		added from Youth Service collection	2,580
		balance as of 4.30.22.	23,315
Emergency Fund			23,621
Alliance		balance as of 3.31.22	9,175
		4.22 expenses	2,100
		balance as of 4.30.22.	11,275
13 Salmon Shelter			13,821
Social Justice (Police Accountability)			9,175
Children's Religious Education			31,550
Music & Arts			40,250

FINAL DRAFT - THE EVALUATION OF THE MINISTRY OF FIRST UNITARIAN CHURCH OF PORTLAND, OREGON, 2021-22

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

SUMMARY

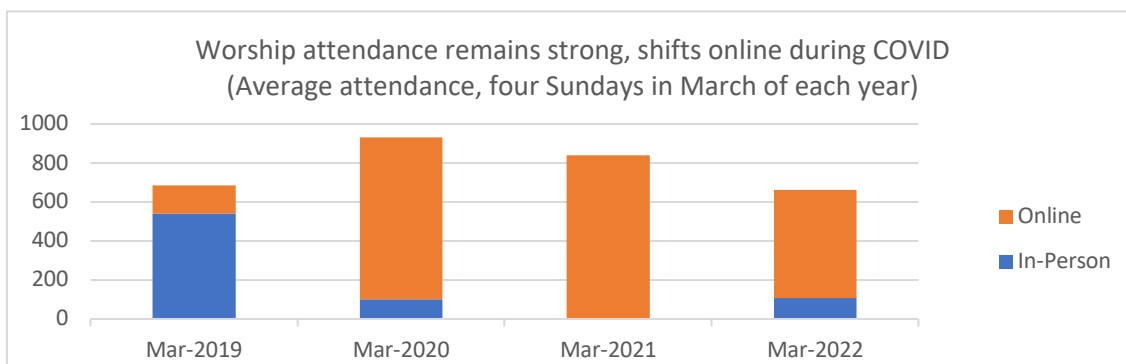
The mission of First Unitarian Church is to create a welcoming community of diverse individuals; to promote love, reason and freedom in religion; to foster lifelong spiritual growth; and to act for social justice. Our bylaws require the Board, the Senior Minister, and the Executive Team (ET) to annually conduct a joint evaluation of the ministry of the church in reference to the church's mission and the policies enacted by the Board.

This evaluation of the ministry is focused on the church year that began on July 1, 2021, and will end on June 30, 2022. It is summarized here, and includes two related additional parts:

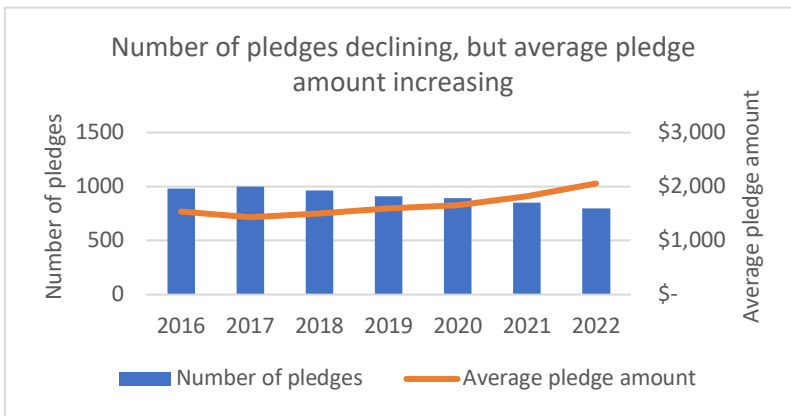
1. A detailed report from the Executive Team summarizing the church's ongoing response to and emergence from the continuing COVID-19 pandemic, including data on attendance and pledging throughout the past several years
2. Responses from an open-ended congregational survey in which a small subset of congregants give voice to their experiences of congregational life in in the past year

We additionally considered narrative reports from several church groups, including the Alliance, Foundation, and Ministerial Search Committee. Together, these suggest that the church ministry remains vital, even in the midst of the prolonged emergence from the COVID-19 pandemic.

After very briefly returning to limited in-person worship in late-Fall of 2021, resurging COVID cases again forced us to almost exclusive online worship and events for most of this church year. Not until March 2022 – almost two full years since our transition to online worship – did we return to regular in-person worship (now very much hybrid with significant online attendance). Attendance data from Sunday worship suggests that attendance remains at roughly pre-COVID levels, though with a flip from majority attendance in-person to majority participation online.



Unlike many peer institutions, financial support for First Unitarian has largely held steady throughout the pandemic. While the number of people pledging financial support to the church has decreased over the past couple of years – a concern that precedes COVID and requires continued attention – the average pledge amount has increased, and we have been within 93% of our annual pledge goals in each of the past seven years.



These numbers are important markers for the engagement of congregants in worship and in the financial support of the ministry of the church, but they do not capture the richness of congregational life in support of our mission through another challenging pandemic year. Throughout the church year, congregants remained grateful for the many ways they’ve been able to engage with one another and our faith using technology, while remaining hungry for in-person connection. The music program, our many social justice groups, adult faith formation offerings, and powerful sermons contributed to meaningful ministry and community at First Unitarian.

While our commitment to religious education remained strong, re-engagement of families with children will require continued focus. Nascent work to support a Younger Adults Caucus faltered during the pandemic without focused staff support, in spite of strong pre-pandemic interest from people in their 20s and 30s. Congregants continue to share concern for the congregation’s lack of racial, cultural and age diversity, even as we continue our work to live into the 8th Principle.

The persistent and faithful work of our Ministerial Search Committee resulted in an overwhelmingly unified congregational vote (>99%) to call Rev. Alison Miller as First Unitarian’s next senior minister, beginning in August 2022. And we close out the church year with farewells and grateful honoring of retiring Senior Minister, Rev. Bill Sinkford.

The thriving of First Unitarian’s ministry in support of our mission through a second year of pandemic is a testament to the dedication and perseverance of our staff, our Executive Team, and our broader congregation, and for that we remain deeply grateful. In this promising time of uncertainty and emergence, though, our evaluation ends with as many questions as conclusions.

Some are quite practical: How large will the post-pandemic congregation of First Unitarian be, and how will we continue to financially support our mission? How will technology continue to shape how we worship and build community, and what will that mean for our physical space needs? What is a right-sized staff to provide professional support to our ongoing ministry?

Others go deeper: How does the 8th Principle call us to reshape our work to build a welcoming, diverse, and multicultural Beloved Community? As the emerging church unfolds, who will join us as part of this chosen faith, and who will we choose together to become? How do we re-engage children, youth, and young adults in our support of lifelong spiritual growth? How will our ministerial transition continue to shape, evolve, and support our broader ministry? And how will we continue to be called to act for justice in this time?

We hold these questions, and our appreciation for the work of the church this year in faith, in hope, and in love.

Executive Team Report: Evaluation of Ministry April 2022

As we approach the Evaluation of Ministry in April of 2022, we believe that an update on last year's report with an addendum, along with updated analysis of attendance and financial data is most appropriate. In addition, we are including questions posed as part of a Generative Discussion for the Board on the Emerging Church from earlier this year.

COVID has continued to be a dominant factor in the life of the church and its ministry this year. And while we may have a slightly better sense, in some areas, of the church that is emerging, in many ways we do not know a lot more. The church will continue to move towards some "new normal" in the months and years ahead but that process of rebuilding will take time, attention and resources. The church will need to be strategic in this process if it is to remain a large and vital congregation. The risk in this period will would be to slip back to a more comfortable, program sized church.

We went into the fall of 2021 with the expectation that in-person worship, classes and events would resume that fall. In June of 2021 we gathered for an in-person worship in Pioneer Square that was, despite some rain, a joyous event. And, we thought, a prelude to regathering in the fall. But those plans were largely put on hold with the emergent Delta variant. In consultation with our Public Health Team, the decision was made in August of 2021 to continue to be virtual only.

In November we did return to in person worship as well as some religious education classes. Attendance was modest with people expressing caution about returning in person. That "reopening" proved to be short lived. The new year brought the Omicron variant and the decision to once again be virtual only.

On March 13, 2022—almost two years to the day of that original shutdown—the congregation returned to in person worship, choirs and education classes. Family worship offered in person attendance for the first time two weeks later, on March 27. It is our hope that we are now back open for the long term. What we have learned so far is that people are again being cautious about returning. In person attendance for worship and education has continued to be modest with a majority of our attendance still virtual. Further analysis of attendance appears in the attached report.

Being in mostly virtual mode affected the church's ministries in different ways. It was perhaps the most difficult for Family Ministries to stay connected with parents and children. Virtual mode doesn't work for everyone—especially young children. The music program was able to adapt with the use of special “singing masks” but the pandemic still made making music difficult. A quartet of singers helped sustain the musical part of the congregation's worship life. The Social Justice program was the most successful at adapting through this time with continued strong engagement from the congregation. A successful weekly Vespers prayer service offered by the church's lay ministers as well as a weekly Lovingkindness Meditation also helped sustain the congregation spiritually.

Many questions remain about how the church will emerge out of this time. In January of 2022, Rev. Sinkford offered some initial reflections and questions on the emerging church. Those are also included in this report.

As of April 2022, a candidate for Senior Minister, Rev. Alison Miller, has been named. She will be candidating for a week in May with a vote to call at the end of that time. Plans are also underway to celebrate the ministry of Rev. Bill Sinkford as he retires from this pulpit.

Plans are underway for a new church year and some “new” normal. As has been the case for three years now, there are many open questions about what the year will look like. As we move through this chapter there continue to be more questions than answers when it comes to the emergent church.

We want to conclude this report with some of the significant developments to note in the last year:

-In May, 2021, the congregation voted to adopt the 8th Principle by an overwhelming margin. This vote was the end of a successful engagement around this proposal that included more than 400 congregants taking part in workshops to learn about and to engage with what this means. We see this as an affirmation that the congregation now sees anti-racism work as central to its ministry.

--The congregation continued to see strong financial support. The Annual Fund Drive came in at about 95 percent of goal, which, given Covid and compared to anecdotal results from other congregations, was a successful effort. A generous one-time gift meant that the goal was reached. The other important thing to note is the number of individuals and families pledging was down and something that

will need to be monitored closely in the years ahead. More financial analysis is also in this report.

--As of this writing, the Ministerial Search was on track for a successful outcome. Thanks to all who helped this important transition in the life of the church possible.

--Also, as of this writing, plans are underway to celebrate the ministry of Rev. Bill Sinkford. The congregation is due to vote to name him Minister Emeritus as well as other ways to honor his tenure here.

--And plans are well underway for the UUA General Assembly in Portland this coming June. First Unitarian will offer the opening worship service at the GA. In addition. many volunteers will work to make this first in person GA in three years a success.

Analysis of Attendance, 2019-2022

Attendance 4 Sundays in March

	In-Person Fam Wor	In-Person Sanctuary	Virtual Fam Wor	Virtual Sanctuary	Total Virtual	Total	Virtual x 1.5	Grand Total
2022								
6-Mar			41	374	415	415	623	623
13-Mar		134	34	358	392	526	610	744
20-Mar		111	29	288	317	428	476	587
27-Mar	16	169	39	295	334	519	686	686
							2022 AVG:	660
2021								
7-Mar			90	530	620	620	930	930
14-Mar			50	517	567	567	851	851
21-Mar			67	467	534	534	801	801
28-Mar			59	462	521	521	782	782
							2021 AVG:	841

	In-Person Fam Wor	In-Person Sanctuary	Virtual Fam Wor	Virtual Sanctuary	Total Virtual	Total	Virtual x 1.5	Grand Total
2020								
8-Mar		398		147	147	545	220	618
15-Mar				555	555	555	825	825
22-Mar				760	760	760	1140	1140
29-Mar				760	760	760	1140	1140
							2020 AVG:	931
2019								
10-Mar		535		88	88	623	132	667
17-Mar		601		110	110	711	165	766
24-Mar		511		100	100	611	150	661
31-Mar		516		85	85	601	128	560
							2019 AVG:	636

The chart above lays out attendance both virtual and in-person, in both the Sanctuary and the Chapel, for four similar weeks in 2019, 2020, 2021, and 2022.

Easter Attendance						
YEAR	IN PERSON		TOTAL	Devices		GR. TOTAL
	9:15	11:15 /11:00		ON-LINE	x1.5	
2017	381	416	797	126	189	986
2018	412	357	769	182	273	1042
2019	523	550	1073	130	195	1268
2020				1146	1719	1719
2021				682	1023	1023
2022		367	367	392	588	955

The Sanctuary felt “full” this Easter (2022), but with 367 in attendance, including 58 choir members and the band, in-person attendance was less than half what we experienced pre-Covid. On-line attendance was much higher, however. It seems good news that the total number of people who joined First Unitarian for worship was not substantially less than in 2017 or 2018. The very high numbers for on-line attendance in the first Covid year must speak more to the yearning for connection in that anxious and isolating period.

Evaluating “attendance” is now complex. Pre-Covid we treated each device as a single person. During Covid we began treating each device as representing 1.5 person.

Note the significant spike in virtual attendance during the first days of Covid. Those highs had reduced significantly by March of 2021.

Oregonians consistently comprise 75 percent or more of our virtual attendance, with Washington accounting for another 8 percent or so. California and Texas each constitute approximately 4% of our on-line viewership, with the remainder coming from a wide variety of states, not consistent from week to week. Recent Sundays included viewers from Massachusetts, Wisconsin, Hawaii, Arkansas and Colorado, to name a few.

Viewed in total, our attendance this spring (2022) is comparable to our pre-Covid attendance. But the balance between in-person and virtual has radically shifted toward virtual. Our members continue to be safety conscious and slow to return to the sanctuary.

We have not reached any stability in the in-person/virtual balance.

Families with younger children are particularly slow to re-engage. That community has been least served by our virtual ministry in the Sanctuary. The on-line Family Worship, though modest in attendance, provides connection for that community.

Our current worship offerings will need to be evaluated in the coming year, after there is more experience and stability in attendance patterns.

Analysis of Financial Giving including pledge data and plate giving, 2016-2022

PLEDGE DATA:

4/19/2022

Campaign Performance Analysis 2016 AFD - Pledges

Page 1

Campaign ID	Description	No. Donors	Avg/Donor	No. Gifts	Avg/Gifts	Total Given	Goal	Over(Under)	%Goal
2016 OperatingPled;	2016 Operating Pledge	984	\$1,539.11	985	\$1,537.55	\$1,514,484.22	\$1,500,000.00	\$14,484.22	100.97%

4/19/2022

Campaign Performance Analysis 2016 AFD PAYMENTS

Page 1

Campaign ID	Description	No. Donors	Avg/Donor	No. Gifts	Avg/Gifts	Total Given	Goal	Over(Under)	%Goal
2016 OperatingPled;	2016 Operating Pledge	954	\$1,521.26	7,792	\$186.25	\$1,451,279.97	\$1,500,000.00	(\$48,720.03)	96.75%

Campaign Performance Analysis 2017 AFD Pledges

Campaign ID	Description	No. Donors	Avg/Donor	No. Gifts	Avg/Gifts	Total Given	Goal	Over(Under)	%Goal
2017 OperatingPled;	2017 Operating Pledge	1,001	\$1,432.00	1,001	\$1,432.00	\$1,433,435.76	\$1,545,000.00	(\$111,564.24)	92.78%

Campaign Performance Analysis 2017 AFD PAYMENTS

Campaign ID	Description	No. Donors	Avg/Donor	No. Gifts	Avg/Gifts	Total Given	Goal	Over(Under)	%Goal
2017 OperatingPled;	2017 Operating Pledge	974	\$1,439.24	7,934	\$176.68	\$1,401,818.46	\$1,545,000.00	(\$143,181.54)	90.73%

Campaign Performance Analysis 2018 AFD PLEDGES

Campaign ID	Description	No. Donors	Avg/Donor	No. Gifts	Avg/Gifts	Total Given	Goal	Over(Under)	%Goal
2018 OperatingPled;	2018 Operating Pledge	966	\$1,504.70	966	\$1,504.70	\$1,453,539.10	\$1,459,000.00	(\$5,460.90)	99.63%

Campaign Performance Analysis 2018 AFD PAYMENTS

Campaign ID	Description	No. Donors	Avg/Donor	No. Gifts	Avg/Gifts	Total Given	Goal	Over(Under)	%Goal
2018 OperatingPled;	2018 Operating Pledge	927	\$1,519.40	7,641	\$184.33	\$1,408,486.61	\$1,459,000.00	(\$50,513.39)	96.54%

Campaign Performance Analysis 2019 AFD - Pledges

Campaign ID	Description	No. Donors	Avg/Donor	No. Gifts	Avg/Gifts	Total Given	Goal	Over(Under)	%Goal
2019 OperatingPled;	2019 Operating Pledge	910	\$1,599.49	910	\$1,599.49	\$1,455,538.14	\$1,506,750.00	(\$51,211.86)	96.60%

Campaign Performance Analysis 2019 AFD PAYMENTS

Campaign ID	Description	No. Donors	Avg/Donor	No. Gifts	Avg/Gifts	Total Given	Goal	Over(Under)	%Goal
2019 OperatingPled;	2019 Operating Pledge	870	\$1,597.09	7,014	\$198.10	\$1,389,472.44	\$1,506,750.00	(\$117,277.56)	92.22%

Campaign Performance Analysis 2020 AFD Pledges

Campaign ID	Description	No. Donors	Avg/Donor	No. Gifts	Avg/Gifts	Total Given	Goal	Over(Under)	%Goal
2020 OperatingPled;	2020 Operating Pledge	893	\$1,657.56	893	\$1,657.56	\$1,480,200.27	\$1,600,000.00	(\$119,799.73)	92.51%

Campaign Performance Analysis 2020 AFD PAYMENTS

Campaign ID	Description	No. Donors	Avg/Donor	No. Gifts	Avg/Gifts	Total Given	Goal	Over(Under)	%Goal
2020 OperatingPled;	2020 Operating Pledge	851	\$1,671.60	6,593	\$215.76	\$1,422,528.76	\$1,600,000.00	(\$177,471.24)	88.91%

4/19/2022 **Campaign Performance Analysis** Page 1
2021 AFD - Pledges

Campaign ID	Description	No. Donors	Avg/Donor	No. Gifts	Avg/Gifts	Total Given	Goal	Over(Under)	%Goal
2021 OperatingPled;	2021 OperatingPledge	850	\$1,817.06	850	\$1,817.06	\$1,544,504.09	\$1,535,000.00	\$9,504.09	100.62%

4/19/2022 **Campaign Performance Analysis** Page 1
2021 AFD - PAYMENTS

Campaign ID	Description	No. Donors	Avg/Donor	No. Gifts	Avg/Gifts	Total Given	Goal	Over(Under)	%Goal
2021 OperatingPled;	2021 OperatingPledge	843	\$1,841.30	6,140	\$252.80	\$1,552,215.68	\$1,535,000.00	\$17,215.68	101.12%

As of 03/31/2022 – Includes a very generous one-time anonymous pledge to be paid towards calendar year-end

4/19/2022 **Campaign Performance Analysis** Page 1
2022 AFD Pledges a/o 03-31-2022

Campaign ID	Description	No. Donors	Avg/Donor	No. Gifts	Avg/Gifts	Total Given	Goal	Over(Under)	%Goal
2022 OperatingPled;	2022 Operating Pledge	798	\$2,056.69	799	\$2,054.12	\$1,641,240.16	\$1,575,000.00	\$66,240.16	104.21%

4/19/2022 **Campaign Performance Analysis** Page 1
2022 AFD PAYMENTS do 03-31-2022

Campaign ID	Description	No. Donors	Avg/Donor	No. Gifts	Avg/Gifts	Total Given	Goal	Over(Under)	%Goal
2022 OperatingPled;	2022 Operating Pledge	653	\$921.75	1,499	\$401.54	\$601,904.94	\$1,575,000.00	(\$973,095.06)	38.22%

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Plate Contributions	
FY2016	\$40,414
FY2017	\$53,027
FY2018	\$37,564
FY2019	\$46,818
FY2020	\$49,102
FY2021	\$46,413
FY2022	\$20,233 (actual 8 months)
FY2022	\$30,350 (annualized)

Notes for Board Generative Conversation about the Emerging Church presented by Rev. Sinkford, January 2022.

Board Generative Conversation 1/6/2022

The Emerging Church: What Are the Questions? How Much Do We Know Now?

We know very little with certainty about the shape/size/needs of the church that will emerge from the pandemic.

The open questions are substantial, with substantial ramifications.

1. How large will the post-pandemic First Unitarian be?

Total membership/attendance/participation important
Balance of in-person vs virtual participation almost more important.
Balance of age groups, racial-cultural-sexual-gender identities,
parents vs. non-parents will be shaped or will shape First Unitarian
ministry.
Difficulty monetizing virtual participation - needs attention.

Extraordinary virtual participation of spring 2021 (900+
devices/Sunday) not sustained. Fatigue at church-on-a-screen?

Brief return to in-person worship not predictive. Pandemic anxieties
and safety concerns still too present. Those concerns, at reduced
levels, however, may well become the norm.

If the return to in-person is predictive at all, the balance between in-
person and virtual will shift dramatically to the virtual. Far too early
to tell.

Assumption among other large UU congregations is that our
congregations will be smaller, at least for a time. Assumption is that
budgets will also be reduced, at least for a time. Retirements of
ministers increased. Also ministers leaving ministry. Explorations of
staff, programmatic sharing (DC area). All Souls/First Unitarian SJ
collaboration.

2. How much financial support will the congregation provide?

Current AFD is only hard data. Close to complete.

5% Shortfall from Goal (Before major donor gift)

Given 2 years of pandemic church life, we view that
result as extremely hopeful.

798 pledge units (vs 850 2021)

Average Pledge increased

Tentative conclusion: Some individuals and families (esp) have “drifted away,” most from outer circles of involvement. Focus on race and changes in music program have had an impact as well.

How many will return (or be replaced by other outer circle folx or even folx for whom the church is central) once return to in-person is well established? Visitors Christmas Eve encouraging...perhaps.

Most UU congregations do annual fundraising in the spring. There will be more information from other large congregations by year end.

3. How much physical space will post-pandemic First Unitarian require?

Answer unclear. Probably less...but how much less?

Given changes in downtown, how much building use will there be on other than weekend daylight hours?

4. How large will a “right-sized” staff be to support the post-pandemic First Unitarian?

At least tentative answers to many questions above needed to begin answering this one.

NB: the staff resources and ministry focus of the church both follow size/money, they also can lead. The success of the large church is dependent on staff and what staff do. Outreach and public presence can grow the church, witness the growth during the early Sewell ministry.

The shape of the church's ministry makes a huge difference and is without the control of the congregation/leadership.

5. What analysis or investigations can be done now? Which must or should wait for a new Senior Minister to arrive and settle into leadership?

Will the new Senior lead this exploration or join an exploration already in process?

Report from May 2021

Report on Ministry in COVID Era

When things shut down in early March of 2020, the Executive Team (ET) and staff were faced with critical questions about how our ministry would continue. Decision-making had to be rapid, testing the capacity of a small staff, accustomed to advanced planning and repetition of past success, to deliver quality but rapidly changing ministry. Clarity of authority of ministers and ET made agility possible. Existing livestreaming capacity, both technological and human, as well as the hard work done on staff collaboration eased the transition to virtual ministry.

The overarching goal was to **maintain the quality and reach of our ministry** while we were forced to be virtual. The assumption was that Covid would be a temporary and short interruption.

We believe that First Unitarian met that goal as effectively as or better than most other liberal congregations.

Priorities

- sustain quality worship online
- maintain bonds of community
- keep congregants and staff safe from illness
- continue to be a voice for justice

The following outline presents our evolving approach as the pandemic developed and virtual ministry stretched from weeks into months and finally into at least a year and a half.

Immediate steps (March 2020)

- shift worship to online only
- decision to keep worship coming from sanctuary with appropriate safety protocols. Fewer than 10 people on chancel (2 ministers, 2 accompanists, 4 singers)
- no in-person choirs. Shift to quartet of four singers. Virtual choirs came later
- encourage staff to work from home when possible. Only handful of staff working physically onsite. Establish social distancing protocols.
- all classes, meetings and rentals moved to virtual spaces.

Intermediate follow up steps (April - August 2020)

Worship: added tech staffing and tech upgrades to enhance worship viewing.

- reviewed special worship services (Maundy Thursday service cancelled, Lenten Tenebrae service added).
- reviewed regular elements in worship (like Flower Communion).
- supported virtual community wide Trans Day of Remembrance Service.

Community: began four rounds of pastoral calls to every household to check in with people. Done by lay ministers and other volunteers

- began communication enhancements including "Staying Connected" weekly emails and expanded use of pre-service slides to announce virtual events and classes. Review of existing communication vehicles to enhance effectiveness.
- began offering other ways to maintain connections including "Coffee Hour with the Ministers."
- publicized availability of Emergency Funds for congregants in need.
- worked to familiarize congregants and staff on use of online platforms for meeting.
- ministry/program areas each established ways to keep in touch.
- worked to make pastoral care available virtually.
- prioritize stable financial base for church:
 - applied for and received PPP loan
 - began planning for an early annual fund campaign in COVID times
 - furloughed rentals manager.

Safety: Made decision to be virtual for all of 2020-21 church year unless there was dramatic change in safety predictions.

- Board decided to postpone ministerial search for a year and asked Rev. Sinkford to stay on as Senior Minister through June 2022.

Justice Witness:

- emphasis on supporting Black Lives Matter through protests on streets, prophetic witness in worship.
- decision to join Western States Center in lawsuit challenging Federal Law Enforcement presence on streets of Portland.

Longer term: Current church year, September 2020-present

Virtual live-streamed worship have remained central. Other parts of our ministry moved more robustly into the virtual space.

- In RE, began weekly family worship recorded during the week and broadcast on Sundays. Began sending out “activity packets” to families. Maintained online cohort groups where possible.
- in music, began offering “virtual choirs,” regular check-ins for participants
- in social justice, more intentional outreach to invite people into justice ministry.
- in adult programs, more offerings to connect people virtually.
- established a weekly Lovingkindness meditation (currently 100 registered)
- established a weekly Vespers service led by lay ministers (currently 160 registered)
- began offering “zoom” memorials or limited in-person memorials that could be livestreamed.
- began virtual social hour that some congregants have come to prefer over “in person.”

Keep congregants safe

- staff began ongoing process to determine safety level for any necessary gatherings. Set up team of medical professionals to help determine safety protocols moving forward.

Justice mission

- continued work to support Black Lives
- established a BIPOC group for mutual support
- offered workshops introducing 8th Principle proposal

Highlights of COVID year:

- strong virtual attendance for Sunday worship and other programs
- Spring 2021 attendance somewhat reduced from highs of 2020
- established weekly virtual Family Worship
- serving families with younger children a mixed success
- regular attendance from 25-30 states and a number of countries

- virtual ministry effectiveness possible by transitioning admin staff and additional facilities staff from support for in-person to support for virtual ministry
- Annual Fund campaign that surpassed goal
- continued strong record on pledge payments
- leader in effort for Black Lives
- emphasis on 8th principle proposal (over 400 attended workshops), now up for congregational vote.
- Seminary for a Day attendance was 188—much greater than in-person attendance in previous years.

Post-Covid Ministry: September 2021 and Beyond

Setting the stage

Staff and Board have begun the process of planning for reopening. We know that we will not return to the church that we left. The nature of church has likely shifted permanently into a still-to-be-defined hybrid model of virtual and in-person gathering. Given the number of unanswered questions and on-going safety concerns, the process of re-gathering the community will be considerably more complicated than the difficult process of moving away from primarily in-person ministry.

Safety

We have a duty of care to those we invite into community. Safety therefore became concern #1.

We have convened a team of medical professionals from within the congregation to help us understand scientific best practice, CDC and Oregon guidelines around safety.

Our preliminary planning assumption is that we will begin to re-gather in person with the start of the next church year: September, 2021.

The advice from the Medical Team is that opening in September is a “definite maybe.” Despite the significant numbers of folks vaccinated, variants of the virus are concerning, as are the increasing numbers of infections in Oregon and other parts of the US. A fourth surge which would delay re-gathering plans is possible.

Beyond the basic questions of when we can begin to gather in person, there are myriad questions about how we will gather, at least initially:

- how many individuals and families will re-gather? How frequently?
- how will we serve and welcome unvaccinated children? Unvaccinated adults?
- should we require proof of vaccination?
- how close can people sit together?
- will masking be required?
- will it be safe to sing hymns?
- how many in-person services will we need?
- what resources will be required to support both our expanded virtual ministry and our in-person ministry?
- what level of risk are we comfortable with in re-gathering?

The Future Church

Some preliminary assumptions we are making:

- that not as many people will attend in person when we return. Some have come to find online worship just fine. Some will have fallen away. That leaves a big question about how many will be back in the sanctuary. Can we stay at one main service? And if that would work for “regular” Sundays, what would happen on “big” Sundays like Homecoming and Easter?
- that we will continue to have a robust online worship. But how will that impact the experience in the sanctuary? Cameras, videos, etc. We know that we will need separate audio feeds. What else will we find that we need?
- that most of our ministries will be operating in some kind of hybrid model; i.e., . meetings in which there are both in-person and virtual participants. Raises big questions about what resources will be needed to support that—technology and human. One thing for sure is that it is likely to require both.
- that our rentals, at least initially, will only be NWA and Outside In. One-time event rental program may return later.

Some assumptions for specific ministry areas:

Social Justice:

- program will continue to have strong online presence. Can we support communities we are in relationship with, particularly marginalized communities, to have an enhanced online presence?

--if we don't have as many rentals might we be able to offer complimentary space/support to groups we want to be in accountable relationship with?

Music:

--music program participants are currently being surveyed to gauge interest in returning to in-person choirs. Could include 4 adult singing choirs that would include "Soul" choir to continue some of the music the quartet has been offering.

Family Ministry:

Perhaps the area with the most questions.

--we're assuming Family Worship will stay. It is currently recorded. Will it be live on Sundays?

--grade-based classroom learning model that we have known not likely to return but how might children gather on Sundays?

Adult Faith Formation:

--classes and small groups likely to remain online initially and then likely operate in hybrid mode. Additional tech resources necessary in each hybrid programming space.

Most groups in the church, including the Board, will be looking at how they will meet and do their business in the future.

Some macro questions:

What staff and technology resources will be needed to support this hybrid church?

What will the continued presence of houseless persons around the church campus and changes in the West End neighborhood mean for all of this?

What will be a sustainable funding model for a hybrid church?

Rentals. What is mission driven? Starting out with only NWA and Outside In. Then reviewing other rentals.

Our church block: what will this mean for the space we have and how we use it?

The ET plans to stay in collaborative conversation with the Board as planning and decision-making proceed. In late summer, we anticipate presenting a more comprehensive review of re-gathering plans as we move toward likely re-gathering in September.

2022 Congregational Survey Responses

The Governance Committee of the Board of Trustees asked the congregation to share their thoughts on the ministry of First Unitarian through an online survey open to congregants for several weeks this spring. We invited participation through notices in the Front Steps newsletter and in pre-worship slides.

We received 54 responses. The sample is small, and skews very White, Woman, and Elder.

Of the 54 respondents, 50 identified as White (or “Caucasian,” “European,” or similar), 1 identified as African American, and 3 declined to name a racial or ethnic identity. 43 identified as “woman” or “female”, 7 identified as male, 2 identified as not aligning with binary gender, and 2 declined to identify themselves in terms of gender. 37 shared that they are in their 70’s or older, 14 are in their 50’s or 60’s, and 3 are in their 30’s or 40’s. No one younger than that responded. 52 Live in the greater Portland area and 2 live elsewhere in Oregon. 46 are members, 8 are not. Assuming it is safe to hold services in person, 39 would prefer to attend mostly or exclusively in person, 13 mostly or exclusively online, and 2 are not yet sure.

These responses do not constitute a holistic summary of the views of the whole congregation, but they offer several themes for consideration as we evaluate the ministry of First Unitarian Portland: Congregants are grateful for the many ways they’ve been able to engage with one another and our faith using technology over the course of the pandemic, and they are also hungry for in-person connection. The music program, the many social justice groups, our religious education and adult faith formation offerings, and powerful sermons have all contributed to meaningful worship and community at First Unitarian. There are concerns about a lack of diversity in the congregation, especially diversity of race and of age, and a mix of ideas for how to meaningfully make change in those areas.

The survey used questions that allowed for open-ended responses. Here is what responding congregants shared.

What helps me feel connected to our church community:

- Participation in organizations Choir, social gatherings, Attending Sunday Service, etc.
- The Sunday service is the hub of collective thought and worship. Even if we are apart physically we are connected in thought and prayer.
- Serving on the committees I'm involved with.
- Being greeted by friendly people, being included in meaningful learning experiences (Seminary for a Day, for example), feeling the topics of the sermons are meaningful to me in my daily life. Not too political.
- Gathering in conversation, either post-rehearsal or in a smaller learning group, either online or in person (preferred.)
- Front Steps and attending church when in non covid times
- Vespers, Alliance, family service, CFE and zoomed classes.
- Sunday services
- People with common values
- Doing projects around the buildings and grounds
- Building community; chatting with others, joining groups
- Personal relationships with congregants
- The Rev. Bill Sinkford's sermons
- currently, the livestream Sunday worship services, the personal calls from the church via Alliance; the Alliance; personal friends who attend the church
- I appreciate the zoom services that helped to inspire me and keep me connected throughout Covid. I feel connected when I sing in the Spirit Choir and when I come to services, whether alone or with a friend.
- music and social justice programs
- Forming relationships with others in the congregation.
- Laughing and singing together, appreciating a good sermon or prayer in a group or from home during live stream, small group activities
- the choirs.
- In person times together
- My history - I've been a member for almost 30 years. I served on and eventually chaired a committee, gone on retreats, taken many classes, was married in Elliot Chapel, was part of women's circle for years, have volunteered in other ways
- Getting together in small group and social settings with others.
- Participating in the choirs and other small groups
- Connection, volunteering, shared values
- Wellspring and Sunday services

- Sermons, music, other congregants, Dana Buhl
- In-person services and events
- Meaning full and challenging interactions with others when engaged in learning.
- Our beautiful music program, our in-person worship services and other gatherings, our coffee hours.
- First, the wonderfully deep spiritual sermons that lead my brain to think more deeply about life and death and justice, and my soul to heal and to feel nourished. Second, the music, joyful and sacred. Third, the people; the many, many bright and competent people who congregate here. Fourth, the deep history in Portland; a history of uplifting to this community and a steadiness in the face of challenges; all of which I am very proud to be a small part of.
- The Alliance
- Its the people, ministers, congregants and members and the 8 guiding Principles
- The groups I am a part of make me feel connected to the community.
- services in person or online, small group study of issues example “seeing white” zoom series
- Community & commitment to Social Justice issues
- services, ministers, lay ministers, newsletter
- The love and caring from Rev. Disrud and the lay ministry team
- Singing in Amity Choir
- The deep and evocative sermons from Rev. Sinkford, Rev. Disrud, and Rev. Smith
- Hybrid and at a distance programs: Racial justice, Meditation, Heartspace, Music (Praise Choir and prerecorded songs for Sundays)
- small groups where I can have meaningful interaction
- Relationships with other congregants and the ministers. Participation in worship. Weekly e-mail. Announcements of joys and concerns. Friday vespers.
- The sense of community, the sense of joy, our music
- The music program.
- For me, it is the relationships I have with other congregants. Our church has a rich and diverse group of congregants with many exceptional talents. I value that.
- My involvement with groups: choir, women's group and a Social Justice Committee.
- My participation in smaller groups in the church, being together on Sundays (even virtually)
- Sunday Worship, belonging to choir, Alliance , a Covenant Group; grandchildren in RE
- Being in community during worship services and social justice activities and programs

- Variety/openness
- The vast number of activities and good causes First Unitarian Church offers and is involved in to make our community BETTER.
- My heart. I love this church community, the ministers, the congregants, the staff. Through this challenging period of the pandemic, our church has made sure everyone was contacted and needs assessed. Programming continued livestream and on zoom. I was able to continue participation in groups that are important to me and feel involved in the life of the church.
- Sunday services
- The people!!! And the commitment to creating positive change both w/in the church and the community at large
- Being able to host and/or participate in worship and other programs on line. Serving as lay minister and weaver/coordinator of vespers services and Living the Questions contemplative conversations group. Receiving weekly e-news and staff "staying connected" columns. Q&A sessions with minister. Serving as Spiritual Director to Wellspring participants. Regular reports from Board Moderator and MSC.
- Volunteering, taking adult classes, building community, and worship experiences
- Singing in past choirs - no longer in a choir, so less connected now

Ways our church has helped me live our principles in the larger community:

- Understanding and accepting "difference" amongst people.
- Not sure
- One way has been to help me understand that being non-violent does not need to mean being passive; that we can be very assertive in doing justice work while still being non-violent. Another way has been to help me understand more clearly that forgiveness is necessary, but need not mean excusing the wrong involved.
- Involvement in the community - not just donations but also by the groups who advocate for change
- Support and companionship in antiracist learning circles
- Reminders
- Providing learning and action opportunities
- Reminded weekly of the church goals, Actively engaging in actions that support our ministry
- I have worked to reduce gun violence in our city; perhaps worship services have helped solidify my intention to do something.
- Broadened my social justice understanding. Having said that, I believe the church's emphasis on social justice has been a bit out of balance -- perhaps needed in developing greater understanding but a re-balancing might be in order.
- I am committed to giving/volunteering, so it has helped me find a way to give back. Participating in Wellspring was a wonderful way to incorporate meditation/prayer and inclusive education into my worldview.
- Becoming more connected to communities of color through music and the learning groups. Empowering me to promote our church and our principles to friends and community members.
- Social Justice Work - Parenting- work, friends and family relationships
- Inspiring activism
- church provided insights and strength and inspiration
- Seeing how UU is involved in Social Justice
- I practice use of reason, tolerance of diversity, and freedom of belief in my daily activities.
- Regular reminders of who I am
- Sermons on love
- teachings from sermons, readings, classes like Wellspring (currently taking)

- I feel Reverend Sinkford always touches my heart and enlivens my spirit. He speaks clear truths, in historical context. I always learn so much. I take notes of his sermons and refer back often. Whether I come to tears or a fullness of joy, I feel blessed. I will miss him dearly. I also appreciate knowing Mr. and Mrs. Rick Lathrop with whom I went to Cambodia to serve in two orphanages there. I learn through song, the readings as well as through the sermons. And there have been many opportunities to do service in the church. Finally, I have been blessed to sing internationally with the choir twice in the past. I also appreciate the offerings to expand our knowledge through special classes, such as White Ally, Social Justice offerings and many others.
- continued lifting up of what is possible, and what individuals can do
- Church helps me to remember that Love is stronger than Hate, that working for justice is an unending and necessary responsibility, that I am stronger when I join with others, that Life is beautiful and of value even when I am faced with evidence to the contrary. In short it helps me maintain and strengthen my faith.
- I reflect on the messages I hear and try to live them week by week. My focus during the Sunday silent meditation is usually about living with love into the week's challenges.
- the sermons remind me how I want to live. The social justice program gives me a pathway.
- I've had values instilled in me that carry over into my life in the larger community. I can't think of anything specific, except it makes me want to volunteer to help those with greater needs than I have.
- The anti-racism offerings (White Ally Toolkit, 8th Principle workshop, and education from staff -- Bill, Dana, and DeReau, in particular) have helped me be a better ally. The groups we've shared our weekly offerings with have helped educate me when deciding where to put my charitable giving dollars.
- Wellspring - learning about social justice; supporting me in finding my way
- Wisdom and spiritual strength gleaned from Wellspring, sermons, services and community of fellow parishioners.
- Helps me consider things from different perspectives, reminds me to slow down and focus on what's really important
- Helped me to clarify my principles and exploring the complexities of what it really means to live them out.
- Engaging in questions around the eighth principle and bringing those questions to the non-first-unitarian circles in my life. Challenging the structures of capitalism, racism, and patriarchy that keep me and the people I love oppressed.
- Being reminded in many ways what might be done better for the benefit of more people.
- It has offered classes, opportunities for service, fun things (auction events) to get better acquainted with other members, and outstanding sermons.

- Grounding and being in relationship with people who share many of my values.
- alerted me to organization to support example the fund that helped with water on Umatilla res
- Our church inspires me to try to be the best person I can be, feel like I learn from our ministers and programs offered at church
- Rev. Sinkford's 24/7 commitment to supporting us in living out the 8th Principle. I was waiting for a medical test in the summer of 2020 when a White man accompanying his friend was asked to wait upstairs. He yelled "I'll bet you wouldn't tell me to leave if I were Black.". I told him his words offended me. I wrote to Rev. Bill as I waited for the test. He replied immediately. I will never forget his ministering to me on the spot.
- Sermons that afflict the comfortable and comfort the afflicted.
- Racism and white superiority are such clever unconscious elements of my very being and Bills patience with my evolving awareness and his consistent persistence in weaving it into my awareness has been appreciated and valued.
- Discussions in workshops.
- By supporting and reinforcing the principles as part of being my better self as I interact at church and the rest of my life.
- Thoughtful sermons, book group discussions, Frontsteps, Alliance, lunches for homeless
- I have felt encouraged to always show up for justice issues, either by joining outside groups, attending events, and diligently providing written testimony for legislative and other local issues.
- I am a multi-generation legacy Unitarian so UU principals and values are woven deep into my being and my soul from birth. I try to live a purposeful life both my volunteering to improve our local community AND support causes for our earth's continued existence; which is in great jeopardy.
- By modeling a welcome to all comers, by supporting congregants in understanding the issues of racism, sexism, homophobia, etc. and their various intersectionalities. The work the congregation did to learn about the 8th Principle then take a congregational vote to approve the adoption is an example of supporting folks in understanding and changing. Most of the social justice groups including the Alliance have engaged in activities in the larger community carrying out parts of our mission.
- inspiration from sermon
- Social justice programs, book groups, and (pre-Covid) community programs such as Trans Story Telling with Paul Iarrabino, White Allies with David Campt, exchanges with Alliance awardees, Death Cafe
- Climate justice, neighbor relationships, justice for all people regardless of race, class, gender or economic status
- I'm not sure it actually has

Ways I would like to see our church community change or grow:

- I would like the church to radically assess our purpose in the larger secular and UU community. Are we consuming money in order to keep comfortable / status quo? Are there other ways to use our funds that better reflect our principles?
- We are an overwhelmingly White and upper-class congregation. If we really embrace the eighth principle, we need to be a space where people of all income levels can feel comfortable. Our very closest neighbors are folks who sleep on our sidewalk. I see us trying to manage their presence, rather than embracing the gifts they might bring to our church community.
- This church does much to stimulate the spirit intellectually, but rarely is there an embodied experience of spirituality. I so appreciate the music program for bringing an element of this embodied spirituality, and I am grateful to sing together now that we are (finally) able to do so again. I would love to see that expand to involve more percussion and more rhythm felt in the body. I would love to see us get up and move a little more as part of worship.
- gracious and open adjustment to new minister
- Staff specifically devoted to engaging younger adults
- Involve more lay worship associates; invite more community artists to participate in worship; sponsor exchanges between First Church and a couple of traditional African-American or other "minority" churches; continue looking for ways to "embody" 8th principle
- Inviting more new age concepts into our dialogue
- Follow the bold leadership of Rev Sinkford. Use the word God. The higher power is one that all of us need to acknowledge.
- More equity in paying staff
- I would like the church to remain a steadfast beacon of leadership and hope in the community. So much has changed so radically in the last 2 years that I feel that slow, limited change is what is most needed as we move forward.
- No idea.
- 1. I would like to hear a more reflective, contemplative, spiritual message from the pulpit. A message that invites people to come up to a higher level of spiritual expression in one's living. 2. I would like to see a greater balance of younger people, a greater intergenerational mix. 3. I would like to have a Congregational Life staff person. If this is not affordable I suggest a Congregational Life committee that functions like many of our other functioning and active groups like the lay ministers who work with Tom Disrud. This Congregational Life committee should be able to function and have true interface with the congregation with space for real outcomes and not a committee that is powerless in making changes and advancements. 4. I would like to come away from the Top-Down management style and have greater collaboration within the church structures. Greater shared decision making. 5. I would enjoy fewer Christian old style hymns. These hymns seem to resonate well with Rev. Sinkford and DeReau but not so much with myself, and many others I speak

with. 6. I hope the church and the new Senior Minister will continue to have regularly scheduled Q & A. And along those lines, while questions and answers are useful and necessary, I'd like to see something more conversational and egalitarian. I would like to see the Senior Minister be curious and interested in asking questions of the congregation. 6. I would like to see the ministers and intern minister circulate and make themselves available and approachable after service in Fuller Hall during social hour when that setting is up and running again.

- I don't dwell on change and grow. I look to the church as a source of stability and value-driven strength in a world that is constantly changing. I observe that the efforts to be inclusive and more diverse as very satisfactory. I want a little more Same Same, please!!
- Hopefully the RE program is getting its footing back, post-COVID. I don't know, as I don't have young children anymore - but I do know how important it is for the life of our church and I'd like to know how that's going. Also, more opportunities for outreach with our music ministry: interdenominational singing, potlucks, etc.
- Be involved in local and global issues
- Establish a volunteer group to provide outreach to members who need respite care to participate in in-person church activities.
- I would like to bring back the bulletin on Sundays so that attendees have a "transitional object" to take with them with information about what the church has to offer, especially for those without computers.
- I hope that it can be a sanctuary, a joy and a call to action for many different people who are missing these things in their lives.
- Reconnecting after Covid, more in person group activities
- More deliberate engagement between youth/children and adults. The generations are silo'd from each other. Have the kids come to services more often. They don't even know what happens in church. My daughter grew up in our church and doesn't really know what happens in church services. Get youth on all committees and the Board too. Get them into choirs.
- I would like to see the women's circles return. The connections I made being with other women were very powerful and taught me that I have the ability and power to do more with my life than I thought I was capable of.
- I'd love to see us connect with other community churches, both UU and non-UU, guided by our work on the 8th principle
- Hold steady on social justice issues: anti racism, reproductive dignity
- More small covenant groups.
- More adult learning programs, offer one or more support programs for marginalized people in the community, find our new normal after pandemic with bonding opportunities
- I'm not sure.

- I would like to see us expand our application of the 8th Principle to how to encourage financial support in ways that less affluent and poor members would find welcoming.
- I would like a group within the social justice program to pursue consistent, persistent public witness at City Hall to make Portland policing accountable and transparent. This is not a political issue; it is a moral imperative. We can look the other way.
- I would like to see more exchanges with other UU congregations in the area.
- Continue the process of living into the beloved community with programming and services that reflect the essence of all the principles. With the uncertainty of what the coronavirus will bring, continue the assessment of future development/use of our downtown block.
- Continued involvement in the life of the larger Portland community as well as continued work among ourselves to more fully live our principles, especially the 8th principle. This will be an ongoing learning.
- more diverse congregation
- Relate more to the urban Portland, build partnerships, enact the 8th principle, offer a more diverse religious spectrum in word, music, classes, and worship.
- Be more deeply involved on climate change
- Diversity in ages, race and cultural interests
- Families returning & involved in worship, interfaith work, work w/area UU fellowships
- Being BOTH a leader/beacon of liberal religion principals while never forgetting our rich history of supporting worthy causes.
- I am by nature an introvert. When I first began attending the Church about 1995, I found it difficult to get acquainted. Although there were smiles and perfunctory greetings, everyone around me at coffee hour seemed to be talking to friends already, and I was reluctant to break in. One person finally did introduce herself to me, and I gradually got to know many people whom I came to know as friends. I have occasionally attended churches of other denominations, some larger than First Church, who make sure that everyone who comes through the door, who shows the slightest interest, is introduced, that day, to a member who will guide him/her to a committee or a "circle" that can make the newbie feel connected. I think we have too many visitors who try us for a Sunday or two or three, and then drift away because they don't feel a connection. I know that achieving what I suggest takes a lot of well-trained and personable members. But I think it would double our membership over a very few years.
- some sort of outreach to communities of color. continued engagement with social justice.
- More emphasis on youth; a set aside Board position for a younger person 16 - 21, chosen by the youth of our congregation; more youth voices participating in

the regular Sunday services; more emphasis in services on the issues of concern among youth

- We are in a period of great change, therefore I would like us not to forget our past traditions but also I need help understanding where we seem to be heading. For example ways to understand our sense of building community, what it means and what it requires.
- Deeper dive into theological grounding and deeper experience of worship. More emphasis on Universalism and less focus on how 1st Church is exceptional.
- I would like to see the music program evolve with not only contemporary music but include traditional music that has been part of church life. I like a big church so I would like to see growth in attendance and increase participation in the social action programs.
- Return to a congregation that practices freedom of belief rather than promoting only one social action viewpoint. We have lost our UU way.
- Would love to have a senior minister who is involved in pastoral care, which Rev Bill was emphatically not during his time here. I know the senior minister for a large church like ours needs to be a good administrator, but not necessarily to the exclusion of pastoral care skills.
- More opportunity to hear/discuss theological differences
- stay steady, keep up the live stream for all to access
- Focus on spirituality instead of only focusing on racial issues
- More collaborative relationship between church groups & ministers/executive team
- would like to see RE program grow so more young people connect with Unitarian Universalism
- I want us to reach out in more tangible ways with our neighborhood, downtown community and region. I want us to utilize our physical facilities to carry out our mission. I want us to continue to grow our virtual presence and bring those folks in as contributing members.

Programs and activities at First Unitarian Portland that have been particularly meaningful for me over the last year:

- Social Justice Committee; Abolition Study Group
- This year has been particularly difficult. Our return to virtual worship when every other (non-unitarian) church in town was continuing in-person services left me feeling depressed and abandoned, and caused me to choose to worship in spaces that offered a space to sing, safely masked and at a distance, with others, even if they were strangers with theology I didn't buy into. There have been moments where we've chosen fear (of a virus, or maybe of some folks' perception of our "irresponsibility") over our responsibility to minister faithfully to our people. I hope we choose differently moving forward.
- on line sunday services. adult classes, trips to Ashland and to the theatre in prison
- Returning to in-person worship and other non-virtual church gatherings
- Vespers Prayer Service; Matins for Lent; Living the Questions; Wellspring
- I was not involved with church within the last year
- racial justice reading groups, care for earth group
- Nothing done in the past couple of years. Retiring and that may change. I want to lured into the fresh schemes of life.
- music program, antiracist learning circles
- ZOOM connection
- I cannot express enough how grateful I am for the 3 phone calls that I received during the pandemic "just checking to see if you need anything or if there is any way that the church can assist you". My husband died midway through the pandemic and this contact helped right my ship as I forged my way into a new way of being.
- We are now ancient and restricted to the Sunday services.
- Living the Questions, Vespers, and Matin; these three activities provide a space for me and other congregants to experience our spirituality in a more contemplative way, as compared to the Sunday sermons that tend to have a more mental orientation. The Sunday sermons tend to have a ministerial intercessionary approach whereas the three above mentioned activities emphasizes personal responsibility in one's spiritual living.
- I am the Floral Coordinator, so being able to add beautiful to the church during a time of darkness was meaningful. This last year has been an anomaly. In years past, Wellspring was deeply meaningful.
- Music ministry and racial justice learning groups.
- Africa Connections Social Justice Group
Zoom SJC meetings
- Sunday services

- Caregiver Support group
- Singing in the virtual choir was fantastic, as well as singing in the new Spirit Choir.
- Lay ministry, grief group, small group ministry, the Alliance, and especially worship, including the Vespers program.
- Weekly Sunday services
- Music program. Zoom meditation. Alliance.
- Over the past year, simply having access to on-line services. I haven't taken advantage of other programming (yet). But, I'm very grateful that the church has been able to offer so much.
- covenant group I belong to.
- Choir meetings and rehearsals, Performing in the Ruby Bridges Suite, the Sewell Lecture conversation between Darrel Grant and Reverend Bill, Watching the services online every week, the 8th Principle meetings,
- Well Spring; Social Justice Reproductive Dignity Cohort
- Wellspring has been a lifesaver over the Covid pandemic years.
- Online church services, chance to return in person
- Covenant group, Immigrant Justice Action Group (IJAG) and the Alliance
- Zooming weekly with covenant group of folks I used to be on the Adult Programs Committee with. Sunday streamed services. Serving on Nominations Committee. The Alliance group
- Singing the Faure Requiem, listening to the Ruby Bridges Suite. See the three responses above too.
- The eighth principle workshops and finding a way to incorporate it into Social Justice work.
- Sunday and vespers services, social justice events and engagement.
- Alliance, racial justice learning circles, immigrant justice actions in the community, the Wellspring program, the Vespers and Matins services - thank you for all of it.
- in-person services
- volunteering and serving on committees, climate justice programs, beyond critical thinking.
- Vespers Alliance zoom classes
- The Alliance
- Covenant Group, Family Service, Alliance, Choir
- Sunday adult church services (even though the pandemic made online format necessary) and The Alliance meetings.
- I now live in Vancouver and am a member of UUCV, but I often "attend" First Church through streaming video. I feel, still, as though I am a part of First

Church and I do contribute to it. Because of COVID restrictions, I have been grateful to receive many wonderful sermons, that have helped me grow spiritually.

- Religious services, working in church organizations and singing with the choir (even at a distance)
- Peace Action Group, virtual social hour, Living the Questions
- My only contact over the past year has been through worship services.
- Streaming worship and Friday vespers.
- The availability of streaming the worship services each week has been important to being in touch.
- Virtually none
- music, social justice
- Sunday services, music, small group activities
- Wellspring Spiritual Ancestors; Alliance
- Choir
- The Alliance
- Online church services
- Sunday services. Group work/discussion/training on 8th principle. Alliance programs. Reproductive Justice cohort training.

PROPOSAL FOR BOOKKEEPING SERVICES



Proposal Date: 5/12/2022
This proposal is good for 90-days.

MONTHLY BOOKKEEPING SERVICES

Following is a list of services to be provided on a monthly basis and the monthly recurring fee proposed. Any additional costs including startup costs and special project costs are outlined below. This fee is based on your budget amount and the average time spent on clients of your budget size.

SMJ will assess the monthly fee annually three months before the end of your fiscal year. We will ask that you provide us certain budgetary information to help us determine the fee.

Services to be provided on a monthly basis (see page 2 for detail)

Notes

Monthly bookkeeping services including bank reconciliations and preparation of monthly financial statements.

This includes two hours reserved for meetings, consulting, and special projects per month. Any additional time spent outside of the regular bookkeeping services will be billed at \$80/hour.

without payroll administration	\$ 2,320.00
with payroll administration	\$ 2,600.00

Initial setup fees (billed at \$80/hour, not to exceed \$2,120)

Notes

Meetings and communication to plan procedures	\$ 400.00	\$ 560.00
Set up G/L and report specifications on Sage 300	\$ 480.00	\$ 620.00
Create Excel spreadsheets as needed for support documentation	\$ 480.00	\$ 620.00
Set up procedures for tracking restricted funds/contracts	\$ 160.00	\$ 320.00

These might include A/P, A/R, prepaid, depreciation & payroll and indirect expense allocations

From	To
1,520.00	2,120.00

Additional fees

Notes

This proposal is for fees associated with initial setup and monthly bookkeeping services.

If we have to go back and redo financial statements from prior periods, we bill at \$80/hour.

Including financial statements for months prior to on-boarding with SMJ.

Annual fees (optional)

Notes

Preparation of 1099 forms (up to 49)*	From	To
	300.00	600.00

This is an annual bookkeeping function. We collect W-9s throughout the year and determine who is a 1099 recipient in January. We then send you a list for review before issuing the 1099s and 1096.

*Additional \$50 if both forms 1099-MISC and 1099-NEC are required.
*If 50 or more 1099s are needed, we will bill hourly at \$80/hour.

PROPOSAL FOR BOOKKEEPING SERVICES



MONTHLY BOOKKEEPING SERVICES

Regular monthly services	Notes
Monthly bookkeeping services including bank reconciliations, balance sheet account reconciliations, and accounts payable services	
Journal entries	Entering interest income, depreciation, prepaid expenses, in-kinds, & other non-cash transactions into the system.
Payroll allocations in general ledger	Allocating staff time based on timesheets or estimates to admin, fundraising, and programs along with allocating time to restricted grants and/or contracts if applicable.
Indirect (shared) expense allocations	Allocating indirect (shared) costs to admin, fundraising, and programs based on an agreed upon methodology (e.g. staff time or direct costs).
Meetings, consulting, communication, special projects	Up to 2 hours included per month, additional hours to be billed at \$80/hour
Monthly financial statement preparation	Includes statement of financial position, budget, statement of activities, functional statement of activities, temporarily restricted funds report, contract funds report.
Dashboard	Creating and updating a monthly dashboard.
Additional services (billed at \$80/hour)	Notes
Meetings, consulting, communication, special projects	Above the 2 hours allotted for regular monthly services.
Grant billing	Financial statements with grant spending are included monthly. The additional service pertains to assistance with filling out grant reports provided by funders.
Contract billing	Financial statements with contract spending are included monthly. The additional service pertains to assistance with preparing invoices or reports to funders.
Workers' Comp reporting	Filing out workers' comp reports.
Donor database reconciliation	Reconciling the General Ledger to the donor database either regularly (i.e. monthly, quarterly, etc.) or if requested by an auditor
Audits by outside agencies	Assistance with an independent auditor is included in the monthly fee. The additional service pertains to assistance with audits from outside agencies including foundations and governments.