

**Meeting of the Board of Trustees September 3, 2025**  
**First Unitarian Church of Portland**

**6:15** (Voluntary: Bring dinner to eat)  
Spiritual Opening

6:30+/- Board Discussion – Review retreat, good, bad, beautiful

7:00 Call Meeting to Order

- Chalice Lighting & Opening Words
- Determine Quorum
- Expectations for Meeting
- Read Covenant (below)
- Thank you cards to Committee Volunteers w/ Cards (Choose from Annual Report)
- Review Agenda

7:10 Introduction and Congregant Comment Time

7:20 Committee Updates (How you spent your summer)

7:35 Consent Agenda

- July Board Minutes
- Summer Committee Meeting Minutes: Finance 6/10/25

7:40 Executive Team Update

- ERTC
- Stewardship
- NWA (Northwest Academy) Lease Negotiations
- Long Range Planning Progress

7:55 Board Work

- Annual Report - Discuss how board uses this (10 mins.)
- Break-Out Session: Comte. prioritize goals to offer (3) as Board Goals (10 mins.)
- Board Goals Determination (10 mins.)
- Board Calendar (10 mins.)

8:35 Executive Session

- Needle Exchange Lease

8:45 Out of Executive Session

- Board Tea
- Use of Slack
- Committee Action Items
- Board Action Items (Begin to create special projects list)

- Review of Meeting
- Closing Words

Adjourn Meeting

## BOARD COVENANT

We covenant to:

1. Uphold the spiritual nature of our work by regularly engaging in spiritual deepening.
2. Demonstrate our leadership and commitment to the church by our example.
3. Listen with an open, nonjudgmental mind and heart.
4. Treat our time on the board as an opportunity to make an important gift to our church.
5. Communicate openly and appreciate others enthusiastically.
6. Practice respect and care for each other.
7. Work toward repair when harm is done.
8. Act for the good of the church and the community.
9. Acknowledge and understand the true history of the church we inherit, and together build a future that embodies our Unitarian Universalist values.
10. Cultivate relationships within the congregation.
11. Discuss and disagree with curiosity, expressing ourselves as clearly, honestly, and lovingly as possible to further the goal of building understanding.
12. Speak openly with the congregation, respecting the confidentiality of board conversations

We pledge to observe these promises, to do our best to trust that others are also observing them, and to be forgiving when we inevitably make mistakes. We accept the accountability implied in these promises.

### Congregant Comment Period Introduction

We hold this time in our meeting to hear the joys and concerns, the hopes, the dreams, and opinions of our congregants as they relate to our church and our actions. We have just read our covenant and want to remind speakers that we are all here together in covenant. Among the things we hold at First Unitarian Church is the inherent worth and dignity of all people.

Keeping this in mind, we would love to hear you.

Process Evaluation Guidelines

First Unitarian Board of Trustees, minutes of working session 7-2-25

Present: Roger Robinson, Julia Griffiths, Leslie Pohl-Kosbau, Saranna Weller-Filz, Bob Bonner, Roger Tobin, Linda Craig, Harriet Shaklee, Tom Disrud, Alison Miller, Kathryn Esty

Absent: David Livermore

**Pre-meeting session:** Board self-evaluation for the activities and accomplishments of the 2024-25 year.

What follows are comments of the trustees in discussion of each of 4 topics.

1) Consideration of the Board Covenant of Leadership:

- Do we need to make the covenant more specific about the 8<sup>th</sup> principle?
- The spiritual portion of our pre-meeting has slipped to a lower priority
- Is it time to revise covenant?
- We need tools to do repair of harm;
- New members found it difficult to learn the true history of the current dissention
- Do we need to more openly record the history of our recent controversy and the actions the church took?

2) Board goals for 2024-5

- We need further progress toward a balanced budget.
- Was there a safe working environment for staff considering the controversies?
- Elucidate steps to take toward 8<sup>th</sup> principle; start walking the talk
- Forums were successful on educating about amendments
- Board successful with by-law changes that had not been completed in prior years
- We held the first in person annual meeting that we had in years – thanks to all involved and hope to make it an annual event
- Note role of Article 2 in board work – love at the center.
- Has policy governance been implemented in such a way as to avoid conflict. Can the board avoid dealing with conflict and still fulfill its function? Clarify boundary of policy board?
- Forums need childcare and food, so parents with kids can stay.

3) Conduct of board meetings

- We need better use of the 6-7 time period.
- Board packet needs a table of contents – hard to locate reports
- Can we improve tracking of ongoing work; have trouble keeping track of own work in context of committee work and other committee's work
- What staff support is available versus our responsibility?
- Let's add process observation questions to board packet.

4) Committee structure

- Do we need to reduce committees with our 9 member board?

- Can we develop a diagram with all committees, what they do, who do they report to, and who are the members. Need role clarity in a governance system.
- Congregant members of committees – clarify roles? Congregant members need to be confirmed each year.

## **Board meeting**

The meeting was called to order by Roger Robinson, followed by the chalice lighting, opening words and reading of the board covenant

Thank you cards were distributed for committee chairs to thank their volunteer members, signed by all present.

Leslie Pohl-Kosbau was the process observer for the meeting

ET report by Rev. Alison:

- The church received a significant check from ERTC which will greatly help church finances;
- We are expecting a drop in income from NW Academy as their enrollment is shrinking. We're currently in negotiation over space.

Board retreat planning is in the works. Topics include the 8<sup>th</sup> Principle and how to function as a strong board. The board retreat will be from 6-9 on Friday, August 29 at a local site. We will meet on Saturday, August 30 from 9-4 at the Willamette Falls church.

Stewardship committee – a joint function of the Finance Committee and the ET. It is currently concentrating on plans for the next Annual Fund Drive.

The Board had a report from the 8<sup>th</sup> principle transformation team at the June Board meeting. Saranna is working to clarify what the board wants to do on the 8<sup>th</sup> Principle and how to work with the transformation team. Saranna and the BLT will work to clarify the charge to the team and explore how to move forward. Saranna will be circulating a short survey to board members in preparation for the retreat.

The Annual Report is in the final stages of preparation. Bob has been getting several views of the shared ministry in the words of our church ministers and leaders. Board members have received a draft report from Bob. It's our collective responsibility as a board to see what conclusions to come to.

After reading the findings, Bob asks that Board members think of what summary statements might be in order. Please respond by July 16. Thanks to Bob, Leslie and Harriet

- 1) The BLT reviewed the preamble proposed by David Livermore to precede the congregant comment period at Board meetings:

We hold this time in our meeting to hear the joys and concerns, the hopes, the dreams, and opinions of our congregants as they relate to our church and our actions. We have just read our covenant and want to remind speakers that we are all here together in covenant. Among the things we hold at First Unitarian Church is the inherent worth and dignity of all people.

We would like to remind you that this is a space for the—we—not the—you. This is not an appropriate space for accusations or calling out of individuals within the church or church leadership. If you have a conflict or concern regarding an individual or individuals at the church, we will be happy to assist in facilitating connection with our newly forming Committee on Right Relations and our newly adopted process for addressing conflict that arises at our church.

Keeping this in mind, we would love to hear you.

The committee agreed that the second paragraph was premature at this time since the Committee on Right Relations is not yet available. However, Leslie will read the rest of the preamble at the June board meeting preceding congregant testimony.

- 2) We discussed preparations for the Board Tea on June 22, when we have 4 auction winners to host. We will check with Jen Thomas to see if we can invite participants in her new members class to increase participation in the tea. Julia will follow up with this.
- 3) The June Board meeting will include a presentation by the Transformation team. The BLT will follow up this presentation with further discussion with the Transformation team about next steps.
- 4) The BLT will review last year's new member orientation to see what adjustments would be needed for our new members this year. At the June BLT meeting we will make plans for the orientation for this year.

Respectfully submitted, Harriet Shaklee

**Note:** This is the current draft of the Annual Report starting with the links to the excellent video of the Annual Forum on May 18 as a way to introduce topics to the readers. After each video link, each speaker has provided a summary report of the year with a focus on who we are presently and how well fulfilling our mission and end policies that might guide our upcoming year of visioning. Additional discussants currently in the body of the report currently include Rev Leah Ongiri (Lifespan RE); Garrett Bond (Music Program), Dana Buhl & SJ team (Social Justice Ministries); Bob Bonner & Harriet Shaklee (2025 Congregational Survey). In the Appendix are complete SurveyMonkey analysis of the 2025 Congregational Survey and reports from 16 of our shared ministry groups.

As the ByLaws require that the Board review and evaluate the report, I propose that the Board will review and write a summary report and evaluation of the 2024-25 shared ministries.

## **THE EVALUATION OF THE SHARED MINISTRIES OF FIRST UNITARIAN CHURCH OF PORTLAND, OREGON, 2024-25**

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

### **Introduction**

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 (shared ministries) of the church in reference to the church's mission and the policies enacted by the Board.

This annual report adds to the written history of our downtown church and reflects our congregational life for posterity. In addition to publishing the report on the church's website, the Board of Trustees and the Executive Committee review it together in order to inform future work.

This evaluation of the ministry is focused on the church year that began on July 1, 2024, and ended on June 30, 2025. This was an important year in which long standing stresses were finally addressed and the church began to work on the necessary healing and transformations. This report includes a series of assessments by the senior minister, assistant minister, staff, board members, and congregants. The Annual Forum in Eliot Chapel after Sunday service on May 18, 2025 had a number of engaging presentations on the State of the Church. As an introduction to the individuals and their written evaluations of our shared ministries this year, we include a video link to their presentations at the Annual Forum or other services. We hope this video serves as an accessible and compelling introduction to their annual evaluations. In their written commentary, each individual (ET, Board and congregants) provide their evaluation of how well our shared ministries are currently fulfilling our primary mission and end policies with attention on projected needs to focus on in the years ahead.. Additional commentary includes summaries of the 2025 Congregational Survey in which 420 congregants provided their assessment of how well we are fulfilling the mission and enumerated end policies with a more comprehensive analysis of all survey data in the appendix. Many of the 30 identified church groups within First Unitarian responded with their own summary statements of the group and its activities, that are summarized in this report as they pertain to our end policies. The complete group reports are in the Appendix.

This analysis is also intended to help guide the church visioning work planned for the upcoming church year 2025-6. Specifically by discussing the current strengths and weaknesses for a sustainable future that sustains our mission and goals, we hope this report will help focus this visioning process and the strategic planning that will follow.

The conclusion contains a summary and evaluation of the 2024-25 shared ministries of First Unitarian Portland by the Board of Trustees and ET.

Finally we include additional primary information on which our evaluations are based in an Appendix.

### **Annual Forum Report on the State of the Church:**

Moderator Leslie Pohl-Kosbau, [Video Link to introductory comments for Annual Forum ~minute 10:27](#). 2024-2025 I was the Moderator of the Board. My goal was to help the Governance Committee of the Board explore ways to look at the Policies and Bylaws to: 1) protect our congregational members contact information, 2) propose the Bylaw change of the number of Board members from 12 to 9, and 3) make sure that a Right Relations Committee was established to help with conflict between members, members and staff, and staff and ministers.

Former Moderator Mindy Clark had done the investigation of reducing the numbers of Board members, and presented her findings to the Board and the Congregation. Governance Chair John Bishop led the Governance committee carefully through steps to appoint a Right Relations Task group to set the mission and purpose for the Right Relations Committee, which will be formed Fall of 2025. It will be an independent group of skilled people who will hear complaints from congregants and staff, when needed, to resolve disputes.

The Board continued to add non-voting members to the Board committees of Finance, Communications, and Governance. The purpose of increasing congregant members is to have additional skilled members contribute to the governance of the Church.

We also know that there will be fewer staff, due to smaller giving in member pledges. More committees will be formed from congregants to help with maintenance, stewardship, and programming.

The Board members have taken up leadership in Finance and Communication to meaningfully meet the mission of the Church and its members. The Budget was presented and passed on May 18<sup>th</sup>, along with the changes in Bylaws to protect congregant information and reduce the number of Board members to nine.

**State of the Church: Rev. Alison Miller [minute 13:15](#)** *Each Transcription of video clips below is intended as a place holder for the speakers written evaluation.*

160 years ago, the idea for First Unitarian Portland was born. Our spiritual forebears, and we in this community have experienced ups and downs over the years, increases and decreases in numbers, years of conflict, and years of development and growth. (See Appendix A) These things have happened within the physical and virtual walls of our spiritual village and beyond in the city of Portland. And this is true throughout history, including these first two years and nine months that I have served as your senior Minister, a privilege that I do not take for granted. In many ways, the first two years felt like transitional Ministry, even though you had chosen not to go with an interim minister or a developmental Minister, but rather a settled Minister.

It meant that you and I, the staff team, the board and other leaders had the tasks of transition - essential work that needed our attention. First, coming to terms with our history, second, discovering a renewed identity, third, allowing new leadership to emerge to renew connections in our city and our denomination.

I'm not forgetting that we have a new Denominational Affairs Committee headed up by Art Unger, committing to new directions and moving towards the next era of leadership. These tasks all take time and commitment and energy to move through. They are not linear, but rather, we will continue to deepen through them and among them over the years and go through cycles of renewal over time.

The good news is that while the first two years navigating these transitional tasks felt especially challenging in the middle of this third year, we have shifted into a phase of development and growth. And growth is not just about numbers, although we did happily welcome over 30 new members at our last membership Sunday in April.

Growth is about deepening our spiritual lives, our generosity, our ability to navigate change and conflict, our capacity to live into and up to our covenants of right relations. Are connections of caring and justice within and beyond our walls being nurtured along with leadership and discernment about the present and future?

I see all of these things percolating and growing at this time. And here is just a glimpse of what's happening, and I have focused on the priorities that we shared with you last year for 24-25.

1) We wanted to enhance our website, social media, and online communications while we were broadcasting worship on Boxcast, YouTube, and Facebook. We are now regularly sharing posts about more and more of what we do around here on Facebook and Instagram, and I hope those of you who are on these platforms will like and share our content. And in the year ahead, we'll seek to get on platforms like Blue Sky.

We aim to grow our Pathways to membership and friendship. The almost weekly Welcome Circle in the sanctuary, the First Steps class, the vitality in the narthex as people show up on Sundays and the book discussion and learning around microaggressions that our hospitality volunteers are engaging with are all examples.

2) We wanted to increase the resources, the time, talent, and treasure that we have to fulfill our mission. I don't know if you have noticed, but our ranks of volunteers have really expanded in many areas of congregational life this year: Social justice, Stewardship, Hospitality, Facilities, and more. And in a year where we were concerned about meeting our financial targets because of conflict, your generosity has made all the difference. When we didn't quite reach the pledge goal at the end of 2024, generosity sprung forth. A congregant offered a thirty thousand dollar match to our delight. To the executive team's delight and surprise, the board said we'll match you, and asked the congregation to match us -- and you did. And then, we just finished really an amazing auction that raised nearly fifty thousand dollars so far.

We aim to learn more about and develop a lifelong Faith formation program for these times. Our religious education program for Children and Youth is now smaller than it has been in a long time. I think this room is still glowing a little for the coming of age ritual here today. Our seventh and eighth graders, shared from the microphone how much this community means to them, and lots of stories about not wanting to wake up early on Sunday mornings and then moving to a place where they feel like this community of belonging and all they learn from and with one another is worth getting up early on Sunday mornings.

One very popular shift has been the first of the month service to create and explore multi-age programming. Our current smaller RE program can gain momentum from combining the energy of multiple classes in creative ways, and we'll be doing more of that next year. Another highlight has been, including more children's voices in our worship life together and next year.

We're going to launch together time every single week. Beginning September 7th, our children and families will be with us at the beginning of every Sunday. The amount of time will be shortened somewhat to support teachers also having the time they need to share and engage in the curricula with their students.

This year, we've been equipping leaders with OWL training and next year we will have a lifelong our whole lives curriculum from kindergarten through adulthood. An Our Whole Lives class for adults hasn't been offered here before. But next year, we will. Leah and Jen and Bill Cunningham are going to teach it. So, sign up soon. I think it'll be popular.

*\* We need more explicit discussion about RE numbers pre and post Covid and the Buchan disruptions this year. Rev Leah is writing a RE report to be integrated here and in its entirety (Appendix B) Also Important theme from Congregational Survey and RE attendance needs a lengthy discussion*

This year, we expanded our adult offerings to include groups that we hope to nurture and grow, such as the young adults in their 20s and 30s, some of whom have organized brunch right now, and the monthly parents Circle, which is also happening right now.

*Survey results suggest that Sunday Service, Community and Adult Programing are the strongest factors bringing people back each Sunday. Expansion on Adult Programming to more like pre-Covid levels appears needed.*

Next year, we look forward to creating a staff and volunteer team to nurture small groups, classes, and adult spiritual formation. We had goals around spiritual growth, including enhancing multi-generational music and worship, as well as building Community online. I mentioned the children's voices in terms of Storytelling in our Sanctuary, and now we are moving to add more children's music into the classroom as well.

We also launched a weekly connect and reflect on zoom on Tuesday evenings at 5:30 p.m., which has fostered deepening around spiritual topics. It also offers midweek touchstones and community building online. We found that once a week was actually a lot to sustain. I couldn't quite clear 5:30 every week, and now we're going to be meeting twice a month on the first and third Tuesdays, which means you can join Jen, Thomas, and me this coming Tuesday if you'd like.

*Social Justice work at 1st U is rated most favorably in averaged Survey results.*

We've aimed to deepen our collaborative Justice, making our denominational connections and our interfaith partnerships. Some examples are the shower project, which is addressing one of the most pressing issues of our city, alleviating the impacts of houselessness. We have connected more deeply with our UUA Regional staff who were with us last summer, and were going to return to offer a workshop in April. However, it was on

the day that about a hundred of us showed up for the Hands-Off protest, and that workshop will now happen next fall instead.

And as I mentioned, we are relaunching the denominational Affairs committee. The Downtown Clergy Association had fallen away because of the pandemic, but we are now beginning to meet with one another again and finding that is critical, especially in these times when immigrants in our community are so vulnerable. And we're figuring out how to partner with one another to protect the residents who are among us.

Finally, the last goal we put forth was about moving towards a renewed *Mission Vision and Strategic Plan* for our shared Ministry. The executive team has been meeting with Josh Reckord who we are calling our behind the scenes coach. A part of his professional experience has been engaging communities and programs and institutions with strategic planning, and I'm going to share just a little bit more about that and what we hope to accomplish in the year ahead later in this meeting.

I want to end with gratitude. Shared Ministry is not done alone, and as the head of staff, I could not do any of what I do without the program leaders and ministers, without Tom and Leah, and Jen and Garrett and Dana and Danielle, and with all of the administrative staff and facility staff capably led by Katherine Estey and by Jason Chapman.

And please know that there are so many both seen and unseen ways that this Ministry of yours and mine is allowed to flourish. I'll give just one example every Sunday morning, especially a Sunday like today. When we have been just fed and nourished by beautiful music, when mentors and parents and children have poured their hearts out about what this faith means to them in two beautiful sanctuaries. In order for us to have that feeling first, our Sextants arrive and clear the block, and often that means cleaning up things like needles and bodily fluids and such. By the time you show up and don't see any of that, it's because people have been hard at work for a long time, and I could lift up so many other examples.

And, we are a staff team, but none of us could do it without all of you. So, thank you for the countless, both seen and unseen ways that you allowed this community to thrive and to be a place of belonging of meaning and of inspiration. Thank you.

**1hr 03:10** I will be very brief about our look ahead next year to weaving together our mission, vision and strategic plan. And we're going to have a weaving together team that is going to work with the ET and the board. And next year, we're focused on questions of understanding who we are. What is our story as a congregation?

That we is the larger community of Portland and the environs; that we is the wider community of Unitarian Universalism as well. So, Who have we been? Who are we now, and you have to have a real sense of that in order to begin to ask, where are we going?

We have to know where we are and who we are to understand who we are called to become? So, strategic planning keys are to create a mission statement. It's been over 30 years. Something like a five-year Vision statement. It's been about a decade. And then? Ultimately, the vision statement will translate into a strategic plan.

How do we get there? Next year will be focused mostly on some of that stealth self-study, understanding who we are. Our hope is that by next May we will have a renewed sense of our mission, and we may even have a pretty good sense of where we're headed in terms of our vision statement. Then in the fall of 2025, because next year is 25-26, we will fully articulate, hopefully, that vision statement and strategic plan and already be living into the first year of that plan. And so, if you have an interest, know that weaving together team will be formed soon, especially if you, like Josh Reckord. I mentioned him earlier, our behind the scenes coach, have some experience with this.

We would love to know that, and we will be going out to different parts of the congregation and to the congregation as a whole, so that it isn't just about folks involved in social justice or music or religious education, always meeting with one another, a chance to go deeply in different areas of the fellowship of the congregation but also to cross-collaborate and hear and learn from one another about what we collectively hope to co-create together, so stay tuned.

**Reflections on the past two years: *Rev Danielle Garret: [minute 28:55](#)***  
**Comments for Board Annual Report on Shared Ministries, 2024-2025**  
**Danielle Garrett, Assistant Minister**

After what was, at times, a difficult and unusual church year, I am leaving with a great deal of hope for the future health of this congregation and pride at what the church has accomplished together. I see movement towards a healthier system that invests in the work of covenant and right relations, practices healthy boundaries, and values shared ministry that respects the talents and gifts of both congregants and ministers. My hope going forward is that the congregation builds on this growth and healing and does not return to unhealthy patterns just because the more acute conflict has quieted.

I want to lift up a few examples of programs I have been engaged with that I believe are worth celebrating and building on. I lift up these areas in particular as places to engage greater lay leadership in light of reduced staff hours next year. One is adult programming. This is one area of church life that has been slow to build back up post-COVID, but there is tremendous promise and appetite for growth. Rev. Alison and I held a rich and lively "Building Your Own Theology" class for young adults, we've experimented with community and parents circles, and continued spiritually grounded offerings such as Vespers and the Labyrinth. I hear a desire from congregants for more programming and believe there is ample opportunity to engage lay leaders in this work going forward. The second area is the Shower Project, which has shifted this year to being almost entirely volunteer run. We've served over 1200 of our unhoused neighbors since opening our doors and I hear from volunteers regularly that the work makes them feel more hopeful, engaged and connected to their community. I hope the church will continue to invest in tangible and concrete social justice work that deeply engages lay leadership, is integrated into the broader life of the church, and responds to the immediate needs of our community.

I also want to share a few comments on the conflict over the music ministry transition that occurred at the church this year. I begin with an assessment that I feel I am in a unique position to share as a departing member of the ministerial staff. I have tried to make clear, whenever possible, how much respect I have for Rev. Alison's ministry and how much I have truly enjoyed working with her and learning from her. Ministering

alongside her has been and will remain a highlight of my professional life. I have also shared how inspiring I find her resilience and loving commitment to this church in the midst of attacks on her integrity and vocation. It is something to be grateful for. That being said, in my assessment, that level of resilience is *far more* than any congregation should ask of a minister (*or expect going forward*). A culture of shared ministry means valuing lay leadership and shared decision making, and it also means valuing the contributions, responsibilities and wellbeing of professional ministers. For a congregation, particularly one of this size, to have successful and sustainable shared ministries, there must be a level of care and concern for the spiritual, physical, and emotional health of all staff, including the called ministers. The treatment Rev. Alison endured for nearly three years is not conducive to a healthy and sustainable ministry. It was not healthy and sustainable for her as a human being or for the health and future of the congregation as a whole. I am deeply grateful for the many congregants who showed up with care and compassion, but the failure of the broader system to care for Rev. Alison's basic wellbeing has been painful to witness.

While that kind of continued treatment of a talented minister is troublesome in and of itself, from a church systems standpoint, it is especially troublesome that it was in response to Rev. Alison's efforts to establish a more healthy, trusting, and covenantal staff culture. A well-functioning congregation *needs* leaders who hold good boundaries and work to establish accountable staffing systems. Part of the role of an effective senior minister is to make personnel and supervisory decisions that value accountability and system health, even if those decisions may be difficult or unpopular. An effective leader also understands the boundaries between supervisor and friend and must be willing to hold staff members accountable to professional standards, even if those staff members are talented or well-liked. It is not an easy or glamorous part of the job, but a crucial one. It is my assessment that Rev. Alison has been punished and faced personal and professional harm for doing this important part of her job. This is both deeply unfair to her but also sends a message to any future leaders that the church does not value healthy, accountable leadership. I think it's important for church leaders and congregants to understand this going forward and to prioritize culture and systems changes that value (rather than punish) healthy management practices and that will protect against this kind of harm and damage in the future.

This conflict brought to light long term stressors and areas of the church system that needed care, attention, and greater health. But it also brought to light the deep resilience, commitment, and courage of this community. You showed up to gather in worship and hold one another's joys and sorrows even when worship was not a comfortable place to be. You said "yes" to shared ministry with one another and with Rev. Alison and committed to a future together. You rejected attempts at vengeance and sabotage and stood fast to the truth. You kept the good work of this church going even when it was hard and painful. It required sitting in discomfort, staying curious, keeping open hearts and minds and being willing to show up together in ways that were different but healthier. What I want for this community now is for you to *keep* doing hard, transformative work together. I hope the congregation will continue to build on the healing that is happening. I especially encourage the congregation to prioritize the work of the right relations committee and ongoing work around healthy boundaries.

I submit these comments with deep love and gratitude for all this community has given to me and the many ways it has shaped my ministerial formation. It is precisely because I have such love, respect, and hope for this beloved community that I want to see it continue to heal, grow and thrive.

**RE for youth and Adults: *Rev Leah Ongiri***

As Portlandia's landscape changes, it impacts our Learning Community and Religious Education program. Many can recite our statistics: Housing costs and other factors drive families with children and youth further away from downtown and the Metro area. Long accustomed to meteoric population growth, Portland proper has experienced stagnation and even shrinkage in recent years. Since pandemic lockdown, all kinds of institutional life report reduced participation, including less school attendance, volunteering, and religious community involvement for people of all ages. Traffic and safety concerns make weekday evening treks to the church building less appealing. The cultural expectation that Sunday morning is always and only for church continues to fade, meaning more scheduling conflicts.

But take heart! Demographic and cultural changes are not curses. They are curves for us to learn to navigate. We can bemoan reality or—as I believe Unitarian Universalism encourages us—express curiosity about what opportunities this new terrain might afford us. Emerging realities can bless us if we accept the changes, harness their resources, and accompany them forward. Our religious tradition is innovating across the movement, and we have real indicators that our numbers are holding more steady than those of some other denominations.

And we're shifting and deepening here, too. This year we focused on offering children and youth opportunities to interact with each other across ages. We gave elementary aged children a chance to connect monthly about our church themes. Kindergarteners and high schoolers got to work together on art and other projects. This coming year, we'll gather for cross-age activities in Eliot Chapel. I look forward to this since I grew up sitting on its chancel steps for Together Time stories. Now our current young ones will get to experience the beauty and peace of this beloved space.

Families are increasingly isolated, broke, overwhelmed, and scared. We take this seriously as a public health crisis by offering witness and respite—and avoiding the pitfall of “helping” with critique, advice, and the sense that parents are not pulling their weight in the church community. We hired five new childcare providers this year to support parents and caregivers in attending events outside of worship. Souper Sunday meant lunch, enabling families to last longer at church. Our Parenting Circle is a community of compassion, strength, and much humor. It was recently described by a participant as “a breath of fresh air after a stale week.” In RE classes, we are embracing a model that crafts a meaningful experience for students who attend regularly but better welcomes and includes those who come less frequently. Rather than punish those who don't come “enough,” our goal is to reward anyone who attends with a full, fun experience.

While not as directly related to family ministry, programming with Revs. Alison and Danielle for young adults was successful in turns of numbers of participants, their reports of a high meaning experience, and its function as an on ramp for those new to our church. There is deep hunger for more adult RE opportunities.

A major challenge facing a fun, nourished future for lifespan learning is the consistent decrease in RE staffing over recent years. Even in the recent church year, our 30 hour a week program assistant resigned. Especially without information about when, if, or how that position might be filled, we now face a new church year with staffing decreased by almost half but concrete plans to increase programs and activities that rely on more staff

to support lay leaders. There is a limit to what one professional (me, in this case) can accomplish. We will be able to address some of these concerns in part by leaning into our model of shared ministry, with lay folks getting to help lead our efforts. However, it will be important to understand that having an adequate staff structure is the best way to identify, recruit, sustain, appreciate, and integrate volunteer participation.

We close this year already excited about the next! We have a robust RE Committee with brand-new members; a dozen people preparing to lead OWL sexuality education classes; a roster of teachers and subs that include people who've never worked with kids and veterans with decades of RE experience; and an impeccably, beautifully organized supply closet. Blessings abound, indeed.

**Music Program:** *Garret Bond* : [minute 24:52](#) our music program where we are, where we've been, and where we have come from.

What is it like to be in a choir? And the answer is you all kind of experience this every week when we sing our hymns together, we have these moments. We breathe together. We share together, and we sing together. Honestly, this is one of the largest choirs in the city of Portland, and that's really quite fabulous. It holds so much meaning to myself and for the choir behind me.

Here are some statistics about our year that I thought it would be fun to share. The choirs have performed a collective 45 services this year since the beginning of September. In total, 102 pieces of music have been sung up here on this chancel that is just by the Chancel and Radiance Choirs, not including the guest choirs that we've had: Portland Gay Men's Chorus, the Cascade Ensemble, and next week the public debut performance of the Sage Singers. There have been over 90 guests that we've brought into this space that we've shared our Chancel with, shared our service with.

We're all aware of the journey that the music program has taken over the last year. It has shaped all of us. Something that has been really extraordinary to watch is the regrowth and the rebirth this program has experienced. Last June we had about 90 people in across five choirs here. And in September, we had about 20 people across two choirs.

By October, we had grown to about 50, and by November we had peaked 65. Now, as of our newest member in the choirs, we have just over 70 people and about 10 in our handbell Ensemble as well. So we have just passed the 80 person mark. We are regrowing our program, and that brings me joy.

People watch what we do, see the work that we do, see the community that we have together and they think, wow, I want to be a part of that. Some folks have come and some have gone, maybe this wasn't the right choir for them. I find that it's the people in the choir behind me and the congregants in front of me that shape the program that we have.

### **Report from the Board:**

Long standing frictions between staff, boards and congregants largely unresolved were publicly exposed at the beginning of the church year with the departure of DeReau Farrar as music director and the subsequent staff

resignations. The resulting demonstrations by DeReau supporters within the congregation severely impacted our covenantal community. This church year we all grappled with repairing harm and developing a path forward.

**Developing Better Ways to support our covenants:***John Bishop: [minute 44:05](#)*

The governance committee reviews the bylaws and makes sure we're up to date with bylaws and other governance issues. Last fall, it deliberated and decided it would be in the best interest of this congregation to undertake research and evaluation for forming a right relations committee and process. Other UUA congregations across the country have done so. We formed a task force called Right Relations Formation Task Force (RRFTF). I was blessed to have a team of congregants with extensive expertise who did our collective work with tremendous care, thought and deliberations. The right relations formation task force has consisted of Jody Feldman, Kathy Ludlow, Lauren McNeil, and myself. We all come with tremendous relevant experience. Lauren McNeil, a social worker, lawyer, and professional mediator who led the formation of a Right Relations Committee for the Elliott Institute. Jody Feldman has led a number of learning circles and been involved along with Kathy Tortorici with conflict resolution at All Souls Unitarian in DC, Kathy Ludlow was a former moderator.

Starting last fall, we began meeting weekly, initially researching other congregations and fellowships that have formed these committees, looking at what they did. We had to adapt an approach specific to our congregation. With full deliberation we formulated documents to form a committee on right relations, starting a charter, a covenant and a policy and process that was then presented to and approved by the governance committee and then the board. The right relations formation task force has begun the work of finding and recommending to the board five to seven congregants to serve on the Committee on Right Relations. There will be a liaison from the board who's not a voting member as this will be an independent committee that isn't controlled by neither the ET nor the board. It is approved by the board, and it is part of the board's responsibility under our bylaws to have conflict resolution processes. Once the committee is formed an immediate task will be to educate all congregants on how to practice right relations whenever conflicts arise.

Our second task force Human Relations Advisory Task Force was started in January 2024., The executive team saw fit to pull together a human resources advisory committee to the executive team to guide HR policy with the church employees and then develop an updated HR Manual for our current needs and existing laws. I've had the pleasure of working with Julia Spence, Randy Russell and Corbett Gordon in this work. I hold this out as an invitation for all congregants to get involved and volunteer work with other people from the congregation. I've gotten to know these people and work with these people, and found it a deepening way of meeting your fellow congregants and working on things in which you have common expertise. Julia Spence has expertise in her world in doing human relations work. Corbett Gordon, a former attorney doing Labor Relations and employment law. Randy Russell, working in corporate HR. Since January of 2024, we have been meeting roughly once a week, to revise our Personnel Handbook going through it meticulously to make sure it's up to date with current laws and that it fits the church needs. Now, we have a new handbook of guidelines and policies for the unique operations of this church.

Now, we will begin sitting down with the executive team to make sure it meets with their views and work on any revisions. And in addition to that, we have been developing policies with the E.T. ongoing for evaluations and better policies for managing the employment relations within the church through the advice of this committee. This committee will live on and continue to give advice to the to the E.T for future work on how this handbook is put in place and how new policies are put in place.

## Financial State of the Church: *Linda Craig*: Finance Committee

Each year, we look at our budget as a way to discern how well we are achieving our goals. This past year has been challenging but we have adapted and made responses that help us sustain our mission and end policies.

- For the previous year that ended 6/30/2024, the church suffered a loss of \$523,000. Most of this loss is a recurring, non-cash charge to depreciation expense required by Generally Accepted Accounting Principles, but \$191,000 was related to investigations, attorney and settlement fees associated with the former Music Director. We began this year with strong feelings that the church could not continue to suffer such losses, and that we must do better at living within our means.
  - Although, as this is written, the financial reporting is not complete for the year ending 6/30/2025, it looks as though our financial loss will be much smaller, and it will be mostly due to the required noncash depreciation charge.
  - In this content, Treasurer Roger Robinson led an active Finance Committee in monitoring the church's income and expenses and in tackling some long-standing financial problems. The Committee included three Board members, Roger, Bob Bonner and Linda Craig, and six congregants. It was staffed by Kathryn Estey and Erin Tafuri.
  - One of the Committee's goals was to present regular financial updates to the congregation. Quarterly meetings were held to report on financial progress and the budget for the coming year.
  - A big financial accomplishment for the year was enlisting the church in a program run by our bank, Beneficial State Bank, to hold cash reserves in interest-bearing, FDIC-insured accounts. We moved \$1,000,000 to these insured accounts, protecting the assets and increasing annual interest income by about \$30,000.
  - The church set a target of \$1.4 million for the 2025-2026 Annual Fund Drive and reached that target with the help of a generous congregant and the Board who each offered to match \$30,000 in new and increased pledges. Other congregants stepped up and completed the \$60,000 match. Although \$1.4 million is not enough revenue to allow for new initiatives, it is enough revenue to balance the 2025-2026 budget.
  - Work continues to see that the church's income is in line with its needs. To that end, a new Stewardship Committee was established to help to build future revenues.
  - The Finance Committee also rejuvenated a Buildings and Grounds Committee to help staff to plan for future repairs and maintenance. Our buildings and mechanical equipment are aging. HVAC controller replacement and roof repair are major foreseen costs. In June, we learned that our renter Northwest Academy is seeking a dramatic reduction in their lease terms in addition to the earlier loss of lease of the Victorian house on 13th.
  - The Finance Committee set four goals for the year, listed below. The first goal was met in full, and work will continue on the other goals in the coming year under the direction of our new Treasurer, Bob Bonner.
  - Enlist in the program available through our bank to cover more of our cash in higher interest paying accounts that are insured by FDIC.

- Review and clarify the unrestricted and restricted fund balances in Reserves to define how these can be used and who approves the use of them.
- Strengthen Board and congregation knowledge of our financial status and reporting.
- Continue contracting for an outside CPA to perform review services on our year-end financial statements and aim for improving the timeliness of this work.

In the Appendix to this report you can find the *State of the Church* insert in the May Annual Vote packet for our next year's budget (approved by 358 of 371 ballots returned (96.5%)).

Once reviewed by our CPA our annual financial statements are posted on our website (e.g. 2024's at <https://www.firstunitarianportland.org/wp-content/uploads/2025/05/Reviewed-Financial-Statements-FYE-06.30.2024.pdf>.)

On a monthly basis. The financial statements from our bookkeeping firm are part of the board's packet each month, and can be found at <https://www.firstunitarianportland.org/board-meeting-packet/> usually at very end of the packet.

***Note the 2025 Survey average ratings were lowest for “Is transparent in church decision making” and “Takes leadership in larger UU community”***

#### **Denominational Relations Art Ungar: [minute 57:13](#)**

Denomination Relations Art Ungar:

I want to talk to you about our church's covenants with other UU congregations. The first level is the Mt Hood Cluster which includes fifteen nearby congregations, many of whom were started by members of this congregation at first church. This group meets monthly online to share our ideas and offer mutual support.

The second level in terms of scope is the Pacific Western region, which encompasses most of the western US, Alaska, and Hawaii and is relatively new, having been separately Incorporated in 2024. The Region has a professional staff service which supports the congregations in the region with information and services in areas such as ministerial transitions, conflict transformation, lifespan, religious education, and youth ministry.

The national level is the Unitarian Universalist Association, the UUA. This is about 1,000 independent congregations who covenant together to form our denomination. The UUA is supported by the member congregations and by donations from individuals. First Unitarian has not paid its full fair share in some years, although it does make a voluntary annual contribution. Voluntary contributing is similar to membership in the congregation. You can be a member without contributing. But the functioning of the church and the UUA depends upon voluntary donations from its members. The UUA speaks for the Unitarian Universalist denomination. It publishes the magazine UU World, which is sent to every member. It assists in the settlement of

ministers, its curricula for religious education such as OWL (Our whole lives) which are used by this congregation. It organizes social justice activities such as UU the vote, which we have participated in, and Side with Love.

To better meet our declared church goal of “providing leadership to the broader UU community”, the Denomination Relations Committee is being rejuvenated. In June we had 11 (2 in-person and 9 on-line) of our allowed 16 delegates attend the General Assembly, the annual meeting of the UUA. This group has made a report to our congregation including how we can be responsive to the three Actions of Immediate Witness and the three-year Study Action Issue. The Denomination Relations Committee welcomes new members to further develop ways in which we can be leaders in our broader UU communities.

**Our Path Forward:** Leslie Pohl-Kosbau:

As we come to the close of the church year, we are planning to move ahead strategically.

What does that mean? I don't know. We have to look at that. We need congregational help. The Board of Trustees is an integral part of leading and working with the members of this church to identify who we are, and at this time and this place. What are our dreams and how can we achieve them.

This will be the focus of the board starting this summer. We work with Reverend Allison and Reverend Tom to involve congregants getting input and shaping the map of our future in Portland. I welcome you to be doing this and to help us understand a little bit more about the Strategic plan.

**Annual Vote:** David Livermore: As the Secretary of your Board of Trustees, I'm here to announce the results of our election. We had 371 ballots returned. Which represents 52% of the 714 church members this year. I'm going to list them out in different sections, but I'm going to start with the Board of Trustees candidates.

Julia Griffiths, who received 355 yes votes

Roger Robinson, who received 358 yes votes.

Roger Tobin received 357 votes.

Seranna Weller Filz also received 357 votes.

They all received support on 96 % or more of the returned ballots.

So, congratulations to our new member and returning members.

For the nominating committee we have some new candidates and an existing candidate,

Ellen Zacny received 356 votes.

Jo Ann Foot received 353 votes.

Pierre Provost received 358 votes, and

Scott Eliasof received 357 votes.

They all received 95 percent or more of returned ballots, so let's congratulate them.

Our operating budget was approved overwhelmingly by 358, yes, votes. nine no votes. And five abstentions. The Budget passed with over 96 percent of the vote.

Article 2 I revision spoke to the church membership list and how that would be shared or how it would not be shared. It will be now under a little bit more of our control rather than matter of right of any member under State Law.

Article II revision received 347 yes votes, 22 no votes, and two abstentions for a total of 94% approval, so it passed.

Article 4 revision reduced the board size to 9 from 12 .

This amendment about the board size received 359 yes votes. 10 no votes, two abstentions, and passed with 97 percent of the vote.

Last, and certainly not least. We have a foundation board candidate Corbett Gordon for those of you who remembered to flip over your ballot.

Corbett Gordon, who received 340, yes, votes.

#### **Commentary on Vote:**

The overwhelming approval of the Board, Nominating Committee, Budget and Board-proposed revisions to our By-Laws is a measure of how far we have moved forward from the peak of the protests in the summer and fall. The voting membership this year was 9.7% lower than the previous year which was double the average 5% annual reduction in voting members observed over the last 10 years. The returned ballots percentage this year was 52% compared to 57% in 2024. Perhaps both a 5% loss in voter response rate and 5% of the loss in voting members might be attributed to members leaving due to the staff changes.

#### **Congregational Survey 2025: (see Appendix for complete Survey results)**

The Governance Committee of the Board of Trustees performs annual surveys of our congregants to better understand their interests, demographics and assessment of how the church is achieving its stated mission and end policies. In January 2025 after large staff changes and vocal protests from a group of congregants, we sought to very broadly invite response to our congregational survey from a list of 1600 congregants and friends via email. This broad reach was an attempt to reach not only those currently regularly attending in person Sunday Services (as in the 2006 service) and also now on-line, but those who had been associated over the past number of years including those no longer attending following Covid and the disruptions within the congregation in the current year. Over the next 3 months we continued to collect survey responses, with direct appeals in Front Steps and the RE weekly newsletter.

The electronic outreach and on-line questionnaire was supplemented by a paper copy of the survey that one could fill out at church, or be sent one in the mail. The surveys were anonymous until respondents filled in their name or email address. 300 of the 434 responses did so which allowed us to remove 10 duplicate submissions from them (over 3 months some may have forgotten they previously responded). The remaining 124 responses did not give name or emails so may have contained a small number of duplicates.

**Survey Development:** First Unitarian Portland is in preparation for strategic planning in this coming church year, and our survey questions ranged broadly over the many goals and concerns of our religious community. In 2006 First Unitarian developed an instrument with similarly broad goals, so the present survey adopted the questions from that survey. Using the same questions could also allow us to compare results from the present congregation with those from nearly two decades ago.

**Survey Respondents:** Extensive outreach over a three month period resulted in 424 survey participants. They self-identified as female (65% female, 25% male, 3% other, 7% not stated), with an average age of 68.9 yrs (2.4% under 35, 9.5% 36-50, 17.4% 51-65, 70.1% over 65), 80% as members and 20% nonmembers, 60% as married, 11% are single (never married), 14% are divorced, and 15% are widowed.

In theology/philosophy, 55% identify as Unitarian and 37% as Universalist, 21% as agnostic, 23% practice nature-centered spirituality, and 20% identify as spiritual but not religious. Others describe themselves as non-religious humanist (18%), Buddhist (15%), and atheist (13%). The remaining respondents indicated that they are non-Christian theist (9%), Christian (6%), Jewish (3%), or other (11%). Respondents could indicate more than one theological identity.

**Sunday Services Attendance:** Our respondents report attending most Sunday services in person or on-line (59%), once a month (27%), less than once a month or rarely (13%). Self-reported in person attendance is most Sundays (43%), 1-2 times a month (23%), and (34%) attending less than once a month. Our on-line participation frequency is self-reported as 14% participating most Sundays, 24% 1-2 times a month, and 62% less than once a month. Of congregants with a partner, 52% indicate that their partner regularly participates in First U activities. 11% of respondents have children in RE.

**Other Church Activities:** Most commonly our respondents have participated in adult RE (49%), volunteer service (47%), social Justice programs (46%), and social activities (45%) at First U. Sizable groups also participate in children's RE (32%), the Alliance (35%), and small group programs (38%). Many of our congregants also serve as ushers (21%) and participate in the music programs (26%). Other smaller programs can be equally important for congregant engagement and/or providing essential support to the church as an organization (e.g. YRUU 8%, art wall 10%, governance 13%, and lay ministry 10%).

**Church Connections:** Many of our congregants came to First U with strong links to the faith, first coming long ago as a child (5%) or having a history as a UU (38%). Other paths to the church include coming with family and friends (20%), hearing from others (17%), hearing about UU (16%), and hearing from the media (3%). Yet others were introduced to our church through events (4%) and weddings/memorials (2%), among other ways (20%).

Our congregants came seeking community (73%), spiritual growth (55%), Sunday services (52%), intellectual engagement (46%), and social justice work (41%). Others seek out RE for children (27%), social activities (27%), volunteer opportunities (26%), adult classes (25%), and the music program (21%). Some come to our church seeking support in transitions (11%), Easter/Christmas services (7%), and a place to get married (3%). The same programs keep people coming back to church, the most common being community (64%) and Sunday services (62%).

Respondents indicated how they learned about programs at church with the most common means being the Front Steps (92%) and announcements at Sunday services (55%). Some learn about programs from other congregants (44%), from church leadership (22%), and from tables at coffee hour (34%). Church forums and committee meetings are common sources of information (19% for each), and bulletin boards are used the least frequently (9%).

**Church Mission and Goals:** In recent years First U has focused its activities on its mission 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 is to be a beacon of hope for us and for our community, a spiritual center in the heart of the city helping each of us to find our spiritual compass and to build the beloved community. The church has articulated a number of goals to achieve that mission. Our survey asked our respondents to let us know how we were doing in relation to those goals.

In rating how well First U was doing in reaching their goals, respondents showed strongest support for these aspects of church life:

	<b>Strongly Agree</b>	<b>Somewhat Agree</b>
Support was strongest for these goals		
• Worship is inspiring, affirming, and deepening	59%	25%
• Supports all for truth in meaning	54%	24%
• Supports social justice in Portland and beyond	60%	31%

Support was also strong for these areas:

• Is a welcoming and loving community	47%	36%
• Religious education with UU values for all ages	42%	31%
• Cultivates leaders who serve and inspire	35%	34%
• Congregants are generous with time and money	35%	43%

Support was more modest for these ratings:

• Takes leadership in larger UU community	28%	35%
• Is transparent in church decision making	21%	30%

Respondents were also asked to rate how important the current church goals are to them, using a five point scale with 5 = high importance, and 1 = low importance. Average ratings are shown here, from highest to lowest rated importance.

<b>Average</b>	<b>rating</b>
• Enhance our ministries in worship, music, spiritual education for all ages & social justice	4.55
• Develop long term plan for the church and its sustainability to meet future needs	4.29
• Establish strong covenantal relationships among minister, congregation, board & staff	4.22
• Promote an ever-growing culture of generosity and financial sustainability	4.18
• Next steps towards living the 8th Principle for multicultural understanding and connections	4.10

Commentary on Survey Results:

The 424 survey responses provided demographic data on congregants and their evaluation of how well the church was fulfilling its mission and end policies and our current board goals. 8% of the responses were very negative and were from those no longer coming due to the staff changes last summer. This survey included questions in previous annual surveys in order to follow trends over the years, and included demographic

questions not asked since 2006. In 2006 church and RE attendance were at a peak, and that survey was completed during the two services on one Sunday and therefore was limited to those actively participating who gave high average ratings >**4.5 (out 5)** to all the stated aspects of the church mission and end policies. The corresponding 2025 Survey ratings of mission and end policies fulfillment were strongly related to self-reported frequency of church service attendance: **4.33** for 217 attended most Sundays in-person, **4.39** for 34 attending most Sundays on-line, and **4.12** for the 47 attending most Sundays only in combination of on-line and in service. Average ratings **3.38-3.60** from those (59) rarely attending in person and intermittently or rarely online were much lower. Those respondents (35) who have stopped attending due to staff changes at the beginning of the current church year gave extremely low average ratings (**2.35**).

**RESPONSE OF ACTIVE CONGREGANTS:** The 298 “regular attendees” (self reported) reflect our more active congregants and a cohort similar to those responding during service in 2006. This 2025 group rated *Worship is inspiring affirming and deepening* (**4.70**), *Is a welcoming & loving community* (**4.59**), *Supports all in search for truth & meaning* (**4.66**), and *Promotes Social Justice in the Portland community & beyond* (**4.72**) the highest and *Is transparent in church decision making* (**3.88**) and *Takes leadership in the broader UU community* (**4.12**) the lowest.

*Program Participation:* The 2025 Survey responses “What keeps you coming back to this church?” checked most frequently *Community* (**70%**), *Sunday Worship* (**70%**), *Spiritual Growth* (**56%**), *Intellectual Growth* (**46%**) and *Social Justice work* (**45%**). These regular attendees noted participation in the church’s Adult Classes (**49%**), Volunteer Service (**47%**), Social Activities (**45%**), Social Justice work (**43%**), Small Groups (**39%**), Alliance (**33%**), and Hospitality/Ushers (**24%**).

*Demographics:* This group of 298 reflects a large majority of our current actively participating congregants based on both official weekly attendance figures and their self reported attendance. Of note the average age of these respondents was **70.2 yrs** (vs **68.9** for all responses) which is ~**19 yrs** older than the average (**51 yrs**) are of the 2006 in service survey respondents. Unlike 2006 survey with high response rates from parents of children in the RE program, the response rate from parents in our much smaller RE program was disappointingly low. This may reflect a lower level of integration of our current RE parents in the life of the church.

A major concern for the future sustainability of the church and its mission is the pronounced aging of our community and the need to attract young adults and rebuild our RE program.

*Church Goals:* All respondents generally rated the current church goals developed by the board highly. Of the same 300 respondents regularly attending *Enhance our ministries in worship, music, spiritual education for all ages & social justice* (**4.75**), *Developing term plan for church and its sustainability to get future needs* (**4.51**), *Promote an ever-growing culture of generosity and financial sustainability* (**4.51**), *Establish strong covenantal relationships among ministers, congregation, board & staff* (**4.43**) and *Next steps towards living the 8th Principle for multicultural understanding & connections* (**4.25**).

### **Group Reports on our Shared Ministries:**

There are many groups within the church which perform our collective shared ministry in areas of including hospitality, social justice, lay ministry, and small group ministries. In the appendix we have compiled a series of reports submitted by these groups at the request of our Board Moderator.

## **2024-2025 Social Justice Ministry Overview**

The Social Justice Ministry at First Unitarian Portland is a vibrant and active community that keeps Love at the center of our antiracism, anti-oppression, and climate justice work. Our work is guided by our Social Justice Covenant. We have eight Social Justice Action Groups working for immigrant support and defense, climate action, reduction of hunger and homelessness, reproductive freedom and bodily autonomy, racial justice, peace in the Middle East, economic justice, and issues of peace and disarmament. In addition, in the Fall of 2023, we created the Collaboration Team, comprising leaders from our Social Justice Action Groups and the Social Justice Leadership Team, to bring social justice (SJ) groups together to work on shared and intersectional issues, and create more opportunities for SJ groups to focus on education and action on the issues of mutual concern. This is particularly important and time sensitive given the current administration's policies, and the need for rapid response and strategic organizing to protect our immigrant and transgender community members.

The Collaboration Team chose "Democracy" as its theme to carry on from the 2023-2024 church year. Under that banner, social justice leaders made a way for hundreds of congregants to write almost 14,000 letters to voters in Arizona in our UU the Vote letter writing project, share information about November 2024 local, state, and national electoral issues, attend two advocacy day events in Salem (Sacred Organizing Coalition Advocacy Day and Ecumenical Ministries of Oregon Advocacy Day) to lobby state legislators, and this summer work collaboratively to create a social justice Democracy in Action initiative. We have also organized two events for our congregation involving sign-making and participating in non-partisan marches in downtown Portland to support democracy. These initiatives have offered congregants with various levels of social justice engagement to take action.

To address the crisis in migration justice, our Immigrant Justice Action Group (IJAG) and the Advancing Racial Justice Action Groups (ARJAG) collaborated to create an online series of webinars, highlighting local and statewide members of frontline communities and organizations and reaching over 200 congregants, other statewide UUs, and other community members. Currently, a similar collaboration between Community for Earth and IJAG is in the works. The documentary "No Place to Grow Old", capturing the growing crisis of older adults aging into homelessness, followed by a discussion, was attended by 100 people as a result of a collaboration between the 13 Salmon Shower Project, the Committee on Hunger and Homelessness, and We Shine.

The collaboration this year between the Sewell Lecture Team and our Care and Action for Reproductive Dignity (CARD) group highlights another important connection between democracy-building and reproductive freedom. The Sewell Lecture Team partnered with Idaho Pro-Voice Project and Boise UU Fellowship's Reverend Sara LaWall, and the Equal Rights for All ballot measure campaign to present a production of the Abortion Diaries and a panel of Idaho and Oregon abortion and trans health advocates. CARD brought in community organizations to table and embraced the initiative's signature gathering. Through that work, they've involved more congregants in the active work of democracy.

Our 13 Salmon Shower Project was created to serve and be in relationship with our downtown homeless neighbors. Though service and radical hospitality are the primary goals of the Shower Project, we also intend to build compassion, relationships, and capacity to advocate for and with unhoused members of our communities for humane housing policies. Our Shower Project has not only exceeded our vision by adding an

additional day of service each week, but it has also engaged many more congregants in our justice ministry, deepened relationships with downtown businesses, organizations, and unhoused neighbors.

Another initiative is being developed to build more capacity and tools to be a welcoming congregation for Trans individuals and families, equipped to offer fellowship and resources alongside the important spiritual nourishment that our ministers provide. This relationship-building helps grow our beloved community while also creating more capacity for our congregation to be in solidarity for the political fight before us.

In summary, our social justice community is adapting to the current political and social challenges before us. Through our collaborations and projects, we are learning how we can engage more of our congregation on many levels of activism and how the urgent needs of our times can unite us for strategic action, adaptive leadership, and broad engagement in our social justice ministry.

This year-end overview is a collaborative effort of the Social Justice leadership team, comprising Dana Buhl, Director of Social Justice, Mary Ann Barham, Scott Eliasof, and Sue Palmister.

### **Summary Evaluation and Conclusion:**

Each member of the Board and ET performed a review of this report and then joined in developing collectively the following summary evaluation of the shared ministries of First Unitarian Portland in the church year 2024-5.

Some initial summary comments:

*Bob Bonner:* major evaluation **concerns** 1) how well we did in the goal of supporting Rev Alison and ensuring a safe church (too slowly in a very difficult situation) and what have we learned that would allow us to do better. Note the Right Relations Committee is only structured currently to deal with conflicts between congregants - not congregants and staff or board; not staff and staff, not staff and board. This is work for the next year.

2) The congregation through giving and the ET and Board through controlling cost made significant steps toward financial stability, but haven't yet addressed the complex issue of sustainability.

3) The RE program which has been in decline for 18 years was hard hit by Covid and the targeted disruptions during this past year. The congregation has aged dramatically over the last 19 years, adult programming has also been set back by Covid and needs to be rebuilt focusing on the needs of our current congregation and also as a means of attracting and integrating younger adults.

**Positives:** 1) We are in a remarkably better place July 1, 2025 than last July 1, 2024 in so many ways.

Remarkably total weekly attendance Spring 2025 and this year's annual pledge drive have been remarkably stable in this church year compared to last year before staffing controversy and disruptions,

2) the rebuilding of the music ministry which was most dramatically affected last July has been most dramatic, more joyful and integrated with sermons than in the recent past and an example for us all.

3) the transition to 9 board members has been quite successfully and the recruitment of congregant members to Board Committees has strengthened our ability to do the work long deferred.

4) the hospitality team efforts have significantly improved our ability to be a welcoming community.

*Harriet Shaklee:*

Lessons learned from our year of challenges:

- Developed church committee structure to better handle disagreements and personnel issues, with institution of a personnel committee, and enabling the launch of a right relations committee this fall.
- Amended by-laws to protect confidentiality of congregational contact information
- Upcoming training on Boundary Setting

Ongoing progress on congregational size:

- Process to welcome newcomers — welcoming circle, training for ushers, newcomers table in Fuller
- Clear process to join church — intro classes, joining Sunday,
- Extended use of social media to promote our programs.
- Engaging on-line participants.

Appendices:

- 1) In 2022-3 Annual Report there were figures of Attendance (Sunday Service & RE registration), membership/budget over the last 50 years with cycles of growth and decline. I would like to have those and where we are now (Alison mentions this in her comments at the Annual Forum).
- 2) Link to all the annual Survey results removing the personal identifiers (name & email). This is a link that still includes the names and emails, but I can assemble responses to individual questions [https://www.surveymonkey.com/results/SM-zBSzG45MDZKybINcD\\_2FTP7w\\_3D\\_3D/](https://www.surveymonkey.com/results/SM-zBSzG45MDZKybINcD_2FTP7w_3D_3D/)
- 3) The 2 page reports from all the “shared ministry” groups.

## **Annual Report Groups in the Church**

### **Name of group: Advancing Racial Justice Action Group (ARJAG)**

Coordinating Team: Aameena Amdahl-Mason, Sharon Copeland, Jody Feldman, Ethel Gullette, Kathryn Scotten

**Mission:** Our mission is to play a leadership role in the work of resisting and dismantling racism and the policies and practices that flow from it and sustain it, within and beyond our congregation.

**Meetings:** Monthly coordinating team meetings; variable event dates

**Accomplishments this church year:** Eighteen Antiracism Learning Circles (multiweek book/podcast discussion groups) involving approximately 150 participants; in collaboration with IJAG, a series of three Zoom forums on protecting immigrants, involving approximately 250 participants in the first two sessions (the third is May 6); and 39 MailChimp emails (YTD, approximately 400 recipients each) informing people about ARJAG events, church events, and notifications and appeals on behalf of community and advocacy organizations.

**Plans for the near future:** TBD at the summer planning retreat.

### **Name of group : The Alliance**

**Contact people:** Evie Zaic, Harriet Shaklee

**Team:** Evie, Harriet Shaklee, Kathy Ludlow, Wendy Rankin, Eunice Letzing, Mark Robinson, Corbett Gordon, Maryann Roulier, Cynthia Sulaski, Nancy Panitch, Jan Clay, Suzanne Kosanke, Linda Craig, Linda Nelson, Bill Bateman, Marty Anderson, Jill Duren, Marie Jamison, Mary Ella Kuster

We are a group of 198 members this year.

**Mission or purpose:** The Alliance seeks to be an active, visible part of First Unitarian Church that gathers in community and fellowship to promote and celebrate its history and the principles of Unitarian Universalism, engage in service to the church and the wider community, address unmet needs, care for one another and grow in mind and spirit.

**Days and times it meets:** Every First Wednesday of the month for Lunch and programs 3<sup>rd</sup> Wednesday of the month for Leadership team meetings

### **Accomplishments this church year: Allocations given out 2024/25**

#### **Black Student Union Advisors of Portland (BSUAP) – \$1,500**

The BSUAP gives support to Black students and families at schools within Portland Public School District that seek to create affinity groups and student unions. fiscally sponsored by the Jefferson High School PTSA.

#### **Oregon Karen Association (OKA), Portland – \$1,500**

The Karen people are a nationless population that historically resides between the Myanmar and Thai borders.

#### **PDX Saints Love, SE Portland – \$1,500**

PDX Saints Love focuses on addressing social determinants of health in underserved communities, especially those living unsheltered or housing insecure.

#### **Adelante Mujeres, Forest Grove and Hillsboro – \$1,000**

Adelante Mujeres was created in 2002 to do something no other nonprofit was doing in Oregon at that time: to focus on the needs of marginalized immigrant Latine women.

#### **Bienestar, Hillsboro – \$1,000**

Bienestar builds housing, hope, and community for the wellbeing of Latinxs, immigrants, and all families in need.

#### **Southwest Equity Coalition (SWEC), Portland – \$1,000**

SWEC is a community-driven partnership of nearly 40 organizations focused on equitable development in southwest Portland.

#### **The Spencer Higgins Education Fund of the Bird Alliance of Oregon – \$500**

This education fund enables over 100 children to attend free and low-cost camps and programs each year that help to foster a lasting sense of place in the outdoors.

These were selected from among the 17 nominated local non-profit organizations as best meeting our criteria for serving Portland residents, particularly women and children from marginalized communities. Our holiday greens and treasures sales were again successful (thank you to all buyers and volunteers who made that happen). Combining those net proceeds with your individual contributions, the Alliance Allocations Committee had the happy task of giving away all those funds – \$8,000!!

We also gave \$5000 to aid the church in the matching fund campaign and \$1000 to the auction. The Alliance also bakes pies for the auction.

### **2024-2025 Alliance Programs**

September 4 – **Cindy Cumfer**: Thomas Lamb Eliot and the Activist Women of First Unitarian Church

October 2 – **League of Women Voters**, Melanie Billings-Yun and Wynne Furth: Ranked choice voting and Portland’s new governance structure

November 13 (note change of date)- **Danielle Garrett** speaking on her experience with pilgrimage.

December 11 (note change of date) – **Threads from Heart to Heart**, our own **Signe Lusk** at the piano!

January 8 – **Multnomah County Homelessness Response Plan** – Ryan Diebert

February 5 – **Friends of Tryon Creek** – Gabe Sheoships, Executive Director

March 5 – **Reproductive Rights and Women’s Health Care** – Judith Arcana

April 2 – **p:ear – Homeless Youth Art Project** – Antonio Camacho Martinez, Program Director

May 7 – **EcoTrust** – Ronda Rutledge, Executive Director, Citizen of Cherokee Nation

**Program Access:** Alliance programs are offered in a hybrid manner, including both in-person and via Boxcast.

**Plans for the near future:** To continue to be a leader in the church and the wider community through monthly programs and grants given to groups that fall within our guidelines of helping women and BPOC communities.

### **Name of group : Archives**

Name of Group: Archives

Contact person: Leslie Pohl-Kosbau

Team: Leslie, Bill Bateman, Ruth Robinson, Suzanne Kosanke, and Ruth Lewellen-Dix. Sam Muller is on loan from the staff.

Mission or Purpose: To house and index the records, books and photos of the Church from 1866 to the present, for research and safekeeping

Days and times group meets: Mondays 10-12

Accomplishments this Church year: Organized the celebration of the 100<sup>th</sup> Anniversary of the Eliot Chapel building and the architect Parker. Continued to organize the Archives rooms and collections.

Future Plans: Continue to receive material from the Church and members, obtain a flat bed scanner from the Alliance funds, and index material for research.

### **Name of group : Beacon Bookstore**

The Beacon Bookstore is open during Coffee Hour each Sunday. Its mission includes two parts: 1) We sell books that support the mission of the Church through the enrichment of its congregation – babies through elders. Our selection includes books about Unitarian Universalism and lots more, board and picture books for little ones, and some of the best and newest books on topics we discuss; topics to make us think. 2) We are a

welcoming space for visitors and newcomers on Sunday morning. Our volunteers are good at starting conversations and answering questions. Coffee cups are also welcome. 40% of the sale price of books and up to 100% of the sale price on greeting cards goes to the Church's general fund. The Bookstore has been part of First Unitarian for more than 60 years. The volunteer committee members are:

**Contact People:** Albert Starr, Ann Habafy, Cynthia Yee, Doug Lowell, Julia Spence, Kathy Ludlow, Mary Weller, Pam Williams, Peg MacNicol, Susan Pryor

Name of group : **Program Report for Community for Earth:**

**Contact People:** This year's coordinating team: Bryan Brumley, Beth Markhart; Roberta Richards; Laura Rogers, and Cathy Tortorici

**Mission:** Spiritually, intellectually, and consciously embrace our role as humans in the interdependent web of existence of which we are a part and take action to mitigate or remediate climate change.

**Goals:** Promote a rapid and just transition to renewable energy, reduce pollution, and renew ecosystems. We take these actions in an inclusive manner, sensitive to the structural racism, harm to all life forms and greed and entitlement of our culture, and stand ready to make amends and restitution where appropriate.

**Days and Times the Group Meets:**

Monthly organizational meetings – Meetings are held Sundays before church on the second Sunday of the month

4<sup>th</sup> Sunday sessions - Additional sessions for deeper exploration (e.g., guest speaker, discussion, restorative session) are held on the 4<sup>th</sup> week of the month, either before church or as appropriate.

**Accomplishments this Church Year:**

CFE focused our actions on following themes -

**Climate Justice Collaboration** - Connect with local and national climate /faith nonprofit groups to promote climate justice awareness and action throughout our congregation. Promoted the March 2025 Ecumenical Ministries of Oregon Interfaith Earth Summit, Hosted an event with 350PDX Policy Director Cherice Bock to discuss the latest Oregon climate/environmental legislation. Supported an “Evening with Bill McKibben” at the church (30 supporting organizations; 920 event registrations; over 300 in-person attendees, 350 on livestream, and well over 100 at several watch parties around the state)

**Democracy, Legislation, and Policy** - Monitor and advocate for local, state, and federal legislation and policies to mitigate the climate and environmental crisis and promote climate justice. Educate our congregation about opportunities for activism:

Supported Divest Oregon in their work to have the state of Oregon pass legislation to divest from investments in fossil fuel companies. 2) Tracked climate-focused Oregon legislation and worked with other non-profit groups to support critical climate related legislation. 3) Tabled at several “Rumble On The River” public meetings to raise awareness about the dangers of the Critical Energy Infrastructure (CEI) Hub in Northwest Portland

**Electrify Everything!** – Explored ways to educate and support the congregation and community in transitioning away from fossil fuel appliances and vehicles

**Earth Day** – During April 2025, provided weekly stories/information in the *Front Steps* on climate/environmental issues

**Youth Outreach:** Participated in Religious Education (RE) program to make connections between climate change/justice and RE programming - climate moxie and climate revolution game

**Community Building** (connect with nature and each other to foster joy and resilience)]

Weekly CFE after-church tabling during coffee hour

Actively participated in the Social Justice Collaboration Team to connect CFE's work with other social justice groups and support the church's social justice program

Promoted the *Stop the Money Pipeline* "Immigration Justice is Climate Justice" training series to find connections between CFE and Immigrant Justice Action Group

Participated in the "Sharing Our Light" testimonials from the pulpit to speak about CFE's value and work, encourage participation in

CFE, and support the church's social justice work

Sent out regular updates to our larger "google group" about CFE activities

Explored ways to understand and expand CFE's membership

Provided two auction items for the church auction -

2024 - Living Building tour; Electric Vehicle Road Rally

2025 - Plastic Free Potluck; Hike; Handmade bowl/two chalices

#### **Future Plans:**

CFE will continue to focus on the above themes. Actions include -

CEI Hub online presentation - [The CEI Hub is a Ticking Time Bomb. Why is that a statewide danger?](#) May 2025; Speakers - Nikki Mandell, CEI Hub Task Force and Laura Rogers, CFE

Supporting Third Act's "[Sun Day](#)" celebration on September 21, 2025 - Celebrate the dramatic growth of Solar [photovoltaic](#) - PV, which is now the world's cheapest source of energy. This is a national event, supported by Third Act as well as other national climate nonprofit groups

Developing a Climate Communications workshop for presentation to interested congregants

Continuing to work with the RE Program (high school level students) on climate related curriculum/activities

Discussing if/how CFE can become an "Action Hub" to inform our members and our larger "google group" about democracy/climate related actions to participate in

Name of group: **CARD (Care and Action for Reproductive Dignity)**

**Contact people:** Marni Tapscott [marni.create@gmail.com](mailto:marni.create@gmail.com); [marni.tapscott@yahoo.com](mailto:marni.tapscott@yahoo.com) Holly Brewster [hollybrewster@gmail.com](mailto:hollybrewster@gmail.com)

#### **Mission**

Our faith tradition calls us to work for reproductive justice as defined by SisterSong Women of Color Reproductive Justice Collective. We share their conviction that every person should have the right to make decisions for their own body, the right to have or to not have children, and the right to raise their families in safe and sustainable communities.

CARD honors gender diversity and reproductive freedom. We center the needs of women, girls, trans and nonbinary people, those whose bodily autonomy and integrity are under attack by political movements, often under the banner of religious fundamentalism.

**Days and times it meets:** currently the 4<sup>th</sup> Sunday each month at 11:30 am. This may change in the 2025-2026 church year.

**Accomplishments this church year**

Group participants used electoral activism to get out the vote for the 2024 general election and continue to do so through letter-writing, postcard writing, phone and text-banking. Participants worked with UU the Vote and along with the rest of the congregation wrote 14,000 letters to affect a positive result in helping Arizonians approve a constitutional amendment improving access to reproductive healthcare. Participants have used electoral activism in other key elections including two important elections of a liberal Supreme Court Justices in Wisconsin. We also helped collect the initial sponsorship signatures for the Equal Rights for All campaign. The CARD team helped plan and deliver an informative and well-attended Marilyn Sewell Social Justice lecture “A Tale of Two States, Abortion and Reproductive Stories from Idaho and Oregon.” CARD members marketed the event, brought in local groups to table, and staffed the event itself.

In addition we improved our knowledge and built community by

- Viewing together the documentary titled The Janes which chronicled the Chicago team of activists providing abortions before it was legal
- Hosting at one of our monthly meetings Elisa Wells co-founder Plan C a national nonprofit organization that works to transform access to abortion in the US by normalizing the self-directed option of abortion pills by mail.
- Attending together a play about the former governor of Texas Ann Richards.

**Plans for the near future**

Improve knowledge about reproductive justice and history through the new and revised SACReD curriculum and consider sharing this knowledge with other congregants or making it available as a part of our adult RE or OWL curriculum.

Help pass the proposed Equal Rights For All Oregon Constitutional Amendment by collecting signatures at public gatherings like neighborhood festivals and local farmers markets.

Continue to stay informed about attacks on the right to bodily autonomy and access to reproductive healthcare within the United States, and continue to learn where the gaps in access are in Oregon.

When and where possible use electoral activism and education to affect positive change.

**Name of group: First U Gardening Group**

**Contact people:** Laurie Lester ([lesterlaura@gmail.com](mailto:lesterlaura@gmail.com)) and Bob Bonner

**Mission or purpose:** To clean the garden beds, tend and beautify the plantings in the square-block campus of First Unitarian.

**Days and Times it meets:** One to two Saturday mornings per month (depending on scheduled events) from March-December. We do not garden in January and February.

**Accomplishments of the group:** With regular communications and gardening dates we have grown to a mailing list of 20 and a working group of 12-15 gardeners. The church was awarded Backyard Habitat Certification several years ago and this requires that 50% of plantings be native—not easy in an urban setting, and especially our neighborhood, but we persevere! In 2024-2025 we replaced many sickly or damaged plants with donations of native plants from the gardening group or church members, and will continue to do so in the coming year. We are a congenial group and appreciate the gratitude of church staff and congregation members for our efforts!

**Name of group : The First Unitarian Church of Portland Foundation** was founded in 2001 as an independent non-profit 501(c)(3) organization. The Foundation provides the church an annual gift to the operating fund of 4%-5% of the endowment's value and provides other significant financial support when necessary. The investments are in ESG funds (environmental, social, and governance) managed by a professional firm. In recent years the gift to the church has been about \$100,000. In 2018 the Foundation led the fundraising effort to Burn the Mortgage and retire debt from the Buchan building.

The Foundation leads Foundation month promoting leaving a legacy gift to the church. In the past two years almost 30 members have chosen to include the church in their estate plan.

The Foundation consists of a seven-member Board of Stewards, five elected by the Congregation and two appointed annually from the church Board of Trustees.

**Name of group : Good Times**

**Contact people:** Jerry Hauser, Jan Orban, Tony Obst, Pat Obst, Sue Sample, Laura Gadley, Elizabeth Britt, Phil Scot

**Mission or purpose**

*Encourage church members to attend social activities to develop friendships and connections. To support activity groups such as TGIF, Movie Group, Book Club, Bridge Club, Walking Group, Dinner with Friends*

**Days and times it meets** *Good Times working group meets the first Monday of each month*

**Accomplishments this church year.** *Created organizational structure, mailing list, online registration, hosted dinner groups, sponsored church auction items,*

**Plans for the near future.** *organizing the All-Church Picnic in August*

**Name of group: Immigrant Justice Action Group**

**Contact people:** Laurie Lester, Mary Ann Barham , Lynn McClenahan E-mail: [ijag@firstunitarianportland.org](mailto:ijag@firstunitarianportland.org)

**Mission or purpose:** In keeping with our eight principles and as social justice allies, our mission is to support and enhance the rights of refugees, migrants, and immigrants in our community. We provide information and promote understanding and engagement of our fellow UU congregants to these ends. We are a core group of about 12-15 active members with a mailing list of 56.

**Days and Times it meets:** We table regularly during coffee hours and have monthly lunch meetings at an offsite restaurant, generally on the last Monday of the month.

**Accomplishments:**

IJAG members participated in the back-to-school supply drive at Western Farm Workers Association (WFWA) in Hillsboro and supported WFWA's tamale distribution in January, providing more than \$1800 in orders and helping with the purchase of new refrigerators. IJAG members also volunteer with the Immigrant Mutual Aid Coalition (IMAC)

IJAG hosted four evening online forums on immigration. The first in October 2024 discussed Democratic and Republican records on immigration. In February through May 2025, IJAG--in collaboration with the Advancing Racial Justice Group (ARJAG)-- hosted three additional forums focusing on protecting immigrants, with emphasis on the constantly changing situation, legislative advocacy and direct support. An aggregate of several hundred viewers attended these forums.

IJAG also works in collaboration with numerous community organizations and coalitions: Interfaith Movement for Immigrant Justice (IMIRJ), the Sacred Organizing Coalition (SOC), Ecumenical Ministries of Oregon (EMO), and the Oregon for All Coalition.

**Near future:** IJAG plans to follow up on the forums with pertinent activities and action alerts.

**Name of Group:** **Membership Engagement**

**Contact person:** Jen Thomas - Staff

**Team: Membership Engagement Team:** Jan Orban, Marti Yoder, Sue Harvey, Sharon Copeland, Laurie Lester, Robin MacRae, Pat Obst

**Mission or Purpose:** to build a welcoming and inclusive community where all feel engaged and encourage membership and participation in congregational life.

**Days and times group meets:** Mondays at 1:00 p.m. in hybrid meeting (in-person and on Zoom). Group meets 10 months of the year.

**Accomplishments this Church year:** Over the past year, the Membership Engagement Team has made significant strides in fostering a warm and inclusive community. Key accomplishments include:

**Strengthened the Welcome Circle:** We enhanced our welcome initiatives, ensuring that guests and newcomers feel genuinely valued and supported as they enter our congregation.

**Expanded and Supported Membership Service:** The team broadened its efforts to serve members, providing meaningful opportunities for involvement and engagement within the church community.

**Recognition of Members:** We implemented new ways to honor and recognize the contributions of our members, celebrating their dedication and commitment.

**Launched a Calling Activity:** To deepen connections, we began a calling initiative, reaching out to members personally to express appreciation for their association with the church and to foster a sense of belonging. These accomplishments reflect our ongoing commitment to building a connected, appreciative, and engaged congregation.

#### **Goals :**

**Expand Diversity on the Committee:** Actively recruit and include members from a wider range of demographic backgrounds and enhance the variety of gifts, perspectives, and talents within the team.

**Fine-Tune the Calling Activity:** Improve and systematize the calling initiative to more effectively connect with congregation members, ensuring they feel appreciated and engaged.

**Establish a System for Staying in Touch with New Members:** Develop a structured process to maintain ongoing communication and support for new members, helping them integrate fully into congregational life and fostering long-term commitment.

**Expanding Work on the 8th Principle:** Deepen efforts to cultivate a community rooted in love, compassion, and justice by embracing the 8th Principle, which emphasizes anti-racism and inclusivity.



**Name of group :** **First Unitarian Men's Community**

**Contact people:** Richard Turner ([751candyman@gmail.com](mailto:751candyman@gmail.com)), Mark Barham ([markbarham49@gmail.com](mailto:markbarham49@gmail.com)), Michael Krauss ([krauss@lclark.edu](mailto:krauss@lclark.edu)), Bob Bonner ([downhillhiker@gmail.com](mailto:downhillhiker@gmail.com))

**Mission or purpose:** To foster soulful sharing among men; to provide mutual support and deepen friendships; to encourage participation in church and community activities.

**Meeting times and sample activities:**

- Zoom meetings every Saturday morning from 8:45-10:30 for soulful sharing of heartfelt events of your week (typically 15 attendees)
- Group Breakfast every Thursday 7:30am-10am
- Hosting Church Pancake Breakfast 1st Sunday of the month from 8:30-10:15 in Buchan Courtyard (crew typically 5-6 volunteers)
- Sunday evening monthly Potluck from 4-8 PM in member's house
- Monthly book discussion group via Zoom 4<sup>th</sup> Friday 6:30 – 8 PM
- Hosting Church-wide half-day workshops in Buchan Conference
- Volunteering in Church activities such as the Shower Project

**Accomplishments this church year:**

- Hosted monthly Church 1st Sunday Pancake Breakfast with typically 80-100 attendees
- Presented *Transitions in Aging* Workshop Sat. March 8 (Buchan)
- Held retreat at Tyee Mountain Lodge

**Plans for the near Future:**

- Tyee Mountain Lodge Men's Retreat July 6-8
- Regular ongoing events

**Name of group : Peace Action Group (PAG)**

**Contact people** Tess Beistel facilitator 503-257-2042 (H)

We have 10 active members in PAG; visitors and new members are always welcome.

**Mission or purpose** Our mission statement:

We gather to create peace in the world

- by nurturing and empowering each other and ourselves as peace activists
- by creating a diverse community that sustains hope in the unending work of making peace
- by educating and mobilizing our community to work for peace

**Days and times it meets** on the 2nd Saturday of each month from 10am to noon; we meet on alternate months at Church in the Channing Room and on Zoom.

**Accomplishments this church year.** Our four working groups have been kept busy in 2024 on areas of specific focus:

- work on Palestinian human rights issues and coordination with the focus on Gaza espoused through UUJME (Unitarian Universalists for Justice in the Middle East)
- work on gun safety issues in our nation and support of legislation in Oregon for gun safety measures
- work on personal and cultural connections with Ukrainians via frequent online meetings called Cafe Conversations (new participants in these calls are always welcome)

- work on antimilitarism legislation, including work on nuclear arms reduction, protesting the burgeoning defense budget and the myriad of related causes, including legislative outreach work

**Plans for the near future.** We will continue work on these 4 focus areas in 2025.

Name of group: **Social Justice Collaboration Team**

**Contact people:** Dana Buhl: [dbuhl@firstunitarianportland.org](mailto:dbuhl@firstunitarianportland.org), Mary Ann Barham: [mab8150@gmail.com](mailto:mab8150@gmail.com)  
Scott Eliasof: [scotteliasof@yahoo.com](mailto:scotteliasof@yahoo.com)

**Mission or purpose:**

The Social Justice (SJ) Collaboration Team is attended by representatives of each social justice action group, plus the Social Justice Leadership Team, and is designed to address the need for the church's SJ action groups and the broader SJ community to work together to focus and integrate their priority actions/activism and create pathways for the congregation to participate in and support this work. The Collaboration Team hopes to reduce the silos between social justice action groups, identify opportunities to synergistically work together, and build on examples like the Democracy Fair, UU the Vote campaign, the Reproductive Freedom Sunday, and the Family Earth Day fair to create ways for the SJ action groups, congregants of all ages, and members of the community to participate in and support the work of furthering social justice.

**Days and times it meets:**

Meets monthly, mostly by Zoom, first Tuesday of the month 10:00-11:30

**Accomplishments this church year:**

- Leaders from each of the social justice action groups have been offering testimony monthly at the services.
- Approximately 13,000 letters were written to voters in Arizona for the November 2024 election, encouraging people to vote, and expressing our UU values.
- Approximately 250 people attended the Sewell Lecture, "A Tale of Two States: Abortion & Reproductive Stories from Idaho and Oregon"
- First Unitarian submitted over 100 signatures to endorse Equal Rights for All, an Oregon ballot measure campaign that will affirm the right to abortion, contraception and IVF, transgender healthcare, and same-gender marriage in the Oregon Constitution.
- Up to 200 people attended the first two of three forums, "How to Protect Immigrants in Our Communities", co-sponsored by the Advancing Racial Justice and Immigration Justice Action Groups (as of 4-21-25)
- Over 100 people attended a showing of the movie "No Place to Grow Old" co-sponsored by the Committee on Hunger and Homelessness, the Shower Project, and We Shine.
- Approximately 80 congregants marched in the April 5<sup>th</sup> Hands Off Day of Action.
- Several groups of congregants went to Salem for the April 7<sup>th</sup> Sacred Organizing Coalition Advocacy Day and the April 29<sup>th</sup> Ecumenical Ministries of Oregon Advocacy Day

**Plans for the near future:**

The Collaboration Team plans to continue its efforts to integrate and connect SJ action groups at First Unitarian and offer congregants opportunities to support our Social Justice mission. This spring members of the Community for Earth and the Immigrant Justice Action Group will attend a three-part series, "Immigration Justice Must be A Climate Fight, Too" and then meet to discuss options for future collaboration.

Name of group: **Ushers**

Contact person: Reed Drew, Usher Coordinator (971) 212-1620

The following individuals were part of the usher team for some or all of the year:

Mark Barham, Bob Bonner, David Boshears, Anne Castleton, Linda Centurion, Connie Cleaton, Linda Craig, Michael Cunningham, Dev Dion, Susan Douglass, Reed Drew, Shelley Drew, Eloise Eccles, Ronnie-Gail Emden, Barbara Hansen, Sue Harvey, Sarabelle Hitchner, Daniel Karnes  
Doug Killian, Laurie Lester, Robin MacRae, Don Mather, Ed McClaran, Aileen Miller, Joan Morris, Mary Lynn O'Brien, Tony Obst, Nancy Curly Panitch, Carol Parks, Martha Peck Andrews, Steve Planchon, Roger Robinson, Roger Rothrock, Phil Scott, Josh Soske, Steve Thomas, Mabsie Walters, Mary Weller, Joe Worth, Marti Yoder, Ron Yoder

**Mission or purpose:** Ushers provide a welcoming presence and help create a safe worship space for congregants and visitors.

Days and times meet: Sundays and holiday services

Accomplishments this church year: Reed Drew took over as volunteer usher coordinator in July 2024. There are five lead ushers serving and about 35 ushers who were recruited and maintained for the year. In September, training was provided to the team in collaboration with the learning community. A pre-service huddle was added where ushers receive any specific instruction for the day. On a typical Sunday, there are eight ushers on duty.

Plans for the near future: Evacuation training is underway with Ushers being provided with building tours so they are familiar with all exits from the Sanctuary and Fuller Hall where people can be directed in an emergency.

Name of Group: **Welcome Desk**

**Contact person:** Ed McClaran

**Team:** Bob Bonner, Sharon Copeland, Shelley Drew, Julie Grice, Mele Howland, Kirstan Lee, Ed McClaran, Cassandra Mick, and Joseph Sawicki.

**Mission or Purpose:** To greet visitors and newcomers before the Sunday services, assist them in joining our Sunday service and activities, and make sure they feel welcome in our community.

**Days and times group meets:** Sundays before and after the Sunday service.

**Accomplishments this Church year:** Hosted the Welcome Desk each Sunday to greet and welcome visitors and newcomers; assisted them with name tags and signing up for our weekly newsletter; provided them needed directional information; answered their questions; made sure that families with children made connections with the RE program; and hosted the after-service Welcome Circle as required. We provide printed copies of the Sunday order of service and large print music lyrics at our table for all congregants. We also assist all congregants with signing up for a permanent name tag and distribute them.

**Future Plans:** Continue to work with Jen Thomas, Member Engagement Coordinator, to improve our greeting and welcoming processes, and make sure our team is fully staffed and trained.

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Comments on our progress on Mission and Ends policies

By Linda Craig

Mission: 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.

Welcoming community: We strive to be a welcoming community, and we made good progress with year with the addition of Jen Thomas, Member Engagement Coordinator. The welcome desk in the Narthex is well staffed by volunteers who greet and orient newcomers. The Welcoming Circle at the conclusion of most services provides newcomers with warmth and direction. The number of new members has increased as a result.

Promoting love, reason and freedom in religion: Rev. Alison preaches a message of love and freedom in religion. Her words from the pulpit helped this year to offset the anger and disappointment expressed by people in our congregation because of personnel changes, but many people were hurt, and some valued, long-time members left the church. During this year, we have worked to rebuild loving relationships in our congregation, and those who attend church now believe that healing is well underway.

Lifelong spiritual growth: Religious education is offered to children in our congregation, but as discussed elsewhere in this report, numbers of participants have been shrinking in recent years. For adults, anti-racism learning circles provide a great opportunity. Hundreds of people from our congregation and beyond have studied together in the circles. Jody Feldman deserves credit for this work. Our Acting Director of Family Ministries, Leah Ongiri, tells us that more adult programs are being planned for next and future years.

Social Justice: Our program is strong and is the reason many people gravitate to First Unitarian. Active, on-going committees, letter-writing to turn out voters for the fall elections, and the Sewell Lectureship on abortion rights were some of the highlights of this year's SJ work.

Although the Church exhibits strengths in working for our Mission, we fell short on some of our long-term Ends policies. Two come to mind that call for attention in the coming year.

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

The disruption in the church caused by the departure of the former Music Director demonstrated that our decision-making processes are not always transparent and clear, and that opportunities for voices of congregants to be respectfully heard were lacking. Also, responsibility for decision-making lacked clarity because of uncertainty about how to apply policy-based governance as it is practiced in our church. The Board struggled with how to meet this goal with loving hearts, finding that we did not have good procedures in place when we needed them. This goal is receiving attention, however, through Board study of policy-based governance and the adoption of a Right Relations Committee. The Committee should be fully functional in the next fiscal year.

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

The church suffered a substantial financial loss in the fiscal year ended June 30, 2024. This year promises to be better, but it won't be good enough to begin to rebuild reserves that were used in prior years. Right-sizing expenses to be met with sustainable income is a need to be addressed in the coming year.

First Unitarian Church of Portland

PRELIMINARY - Statement of Financial Position as of 05.31.2025 / pg. 1 of 3

Prepared by Susan Matlack Jones & Associates (unaudited)

	5/31/2025	6/30/2024	Change
<b>Assets:</b>			
Petty Cash	500	500	-
BSB Checking 4673	368,734	455,254	(86,520)
BSB Checking 5591	23,931	23,766	165
BSB Checking 5601	18,934	993,754	(974,820)
BSB Checking 5614	104,734	104,011	723
OnPoint	18,210	17,102	1,108
CDARS	905,967	-	905,967
ICS Money Market 601	120,490	-	120,490
Franklin Investments	16,200	15,935	265
Charles Schwab Investments	210,420	197,642	12,778
Federated Investments	9,676	9,460	216
UBS Investments	0	(0)	0
Accounts Receivable	940	7,393	(6,453)
Pledges Receivable - Operating Pledges	550,686	550,686	-
Pledges Receivable Allowance Uncollectable	(60,000)	(60,000)	-
Prepaid Expenses	14,751	19,843	(5,093)
Prepaid Insurance	0	1,355	(1,355)
Prepaid Power Purchase Agreement	18,083	18,083	-
Bookstore Inventory	16,343	16,343	-
Land	613,424	613,424	-
Buildings & Improvements	9,260,889	9,260,889	-
Furniture & Equipment	288,273	288,273	-
Accumulated Depreciation	(5,109,367)	(4,851,907)	(257,460)
Lease Origination Costs	15,000	15,000	-
Accumulated Amortization	(6,396)	(6,396)	-
<b>Total Assets</b>	<b>7,400,422</b>	<b>7,690,408</b>	<b>(289,986)</b>
<b>Liabilities:</b>			
Accounts Payable	7,625	69,352	(61,726)
Credit Card Payable	(41)	10,903	(10,944)
Accrued Wages	1,416	80,701	(79,285)
Accrued Vacation	80,344	80,344	-
Deferred Lease Revenue	330,221	332,085	(1,864)
Oregon Clean Power Note	20,177	20,177	-
<b>Total Liabilities</b>	<b>439,742</b>	<b>593,562</b>	<b>(153,820)</b>
<b>(Cont'd on next page)</b>			

First Unitarian Church of Portland

PRELIMINARY - Statement of Financial Position as of 05.31.2025 / pg. 2 of 3

Prepared by Susan Matlack Jones & Associates (unaudited)

	5/31/2025	6/30/2024	Change
<b>Net Assets:</b>			
Net Assets Without Donor Restrictions:			
Undesignated and Unrestricted Net Assets	6,119,429	6,119,429	(0)
Operating Fund	(296,131)	(0)	(296,131)
Capital Fund*	-	-	-
Annual Operating (Contingency) Reserve*	40,230	-	40,230
Safety Reserve*	140,235	140,235	-
Major Repair & Equipment Reserve*	165,855	165,855	-
Tax Rebate Reserve	-	-	-
Required Loan Reserve	-	-	-
Rental Income Reserve	(1)	399	(400)
Sabbatical Reserve	1,000	1,000	-
Special Projects Reserve	-	-	-
Major Donor Reserve	163,440	163,440	-
<b>Total Net Assets Without Donor Restrictions</b>	<b>6,334,057</b>	<b>6,590,358</b>	<b>(256,301)</b>
Net Assets With Donor Restrictions			
Commemoration Fund	12,212	12,212	-
Chesney-Deale Intern Minister Fund	36,671	36,376	295
Hessler-Deale Women in Ministry Fund	18,862	17,300	1,562
Sewell Lecture Series	203,691	198,124	5,567
Hollingsworth Anniversary Fund	21,312	21,931	(618)
Slegers Music Ministry Fund	30,817	31,804	(988)
Sinkford Scholarship - Inactive	-	-	-
Justice Begins at Home Fund	(0)	(0)	-
Fund 49 - 13 Shower Project	72,274	12,561	59,713
Fund 49 - Adult Programs Scholarships	4,672	4,672	-
Fund 49 - Alliance	3,033	8,926	(5,893)
Fund 49 - Anti-Racism Curriculum	720	720	-
Fund 49 - Auction	107,806	58,901	48,905
Fund 49 - Campus Ministry	1,266	1,266	-
Fund 49 - Congregant Care	19,765	11,644	8,122
Fund 49 - Contingency Minister - Disrud	2,598	3,148	(550)
Fund 49 - Contingency Minister - Miller	2,020	2,020	-
<b>(Cont'd on next page)</b>			

First Unitarian Church of Portland			
PRELIMINARY - Statement of Financial Position as of 05.31.2025 / pg. 3 of 3			
<i>Prepared by Susan Matlack Jones &amp; Associates (unaudited)</i>			
	5/31/2025	6/30/2024	Change
Fund 49 - Executive Team Contingency	1	1	0
Fund 49 - Family Ministries	19,711	18,982	729
Fund 49 - Family Ministries - Coming of Age	3,467	3,467	-
Fund 49 - Family Ministries - YRUU	36,626	34,128	2,498
Fund 49 - Lay Ministry	910	610	300
Fund 49 - Men's Group	2,108	2,003	105
Fund 49 - Mosaic Wall Maintenance	1,421	1,421	-
Fund 49 - Music	15,775	14,720	1,055
Fund 49 - Quilts of Love	1,358	1,619	(261)
Fund 49 - Social Justice	4,127	4,127	-
Fund 49 - UU-UNO	1,477	1,477	-
Fund 49 - Young Adults	1,923	1,423	500
Idaho Interfaith Fund	0	905	(905)
Employee Retention Tax Credit (ERTC)	-	-	-
Signe Lusk Gift Fund	-	-	-
<b>Total Net Assets With Donor Restrictions</b>	<b>626,623</b>	<b>506,488</b>	<b>120,135</b>
<b>Total Net Assets</b>	<b>6,960,680</b>	<b>7,096,846</b>	<b>(136,166)</b>
<b>Total Liabilities and Net Assets</b>	<b>7,400,422</b>	<b>7,690,408</b>	<b>(289,986)</b>

First Unitarian Church of Portland				
PRELIMINARY - Statement of Financial Position - Summary as of 05.31.2025				
<i>Prepared by Susan Matlack Jones &amp; Associates (unaudited)</i>				
		5/31/2025	6/30/2024	Change
<b>Assets:</b>				
	Cash and Cash Equivalents	655,533	1,594,386	(938,853)
	Investments	1,142,264	223,037	919,227
	Receivables	491,626	498,079	(6,453)
	Prepaid Expenses	49,177	55,624	(6,447)
	<b>Total Current Assets</b>	<b>2,338,600</b>	<b>2,371,126</b>	<b>(32,526)</b>
	Fixed Assets	5,061,823	5,319,282	(257,460)
	<b>Total Assets</b>	<b>7,400,422</b>	<b>7,690,408</b>	<b>(289,986)</b>
<b>Liabilities:</b>				
	Accounts Payable	7,585	80,255	(72,670)
	Accrued Wages & Vacation	81,760	161,045	(79,285)
	<b>Total Current Liabilities</b>	<b>89,345</b>	<b>241,300</b>	<b>(151,956)</b>
	Deferred Lease Revenue	330,221	332,085	(1,864)
	Oregon Clean Power Note	20,177	20,177	-
	<b>Total Liabilities</b>	<b>439,742</b>	<b>593,562</b>	<b>(153,820)</b>
<b>Net Assets:</b>				
	<b>Total Net Assets Without Donor Restrictions</b>	<b>6,334,057</b>	<b>6,590,358</b>	<b>(256,301)</b>
	<b>Total Net Assets With Donor Restrictions</b>	<b>626,623</b>	<b>506,488</b>	<b>120,135</b>
	<b>Total Net Assets</b>	<b>6,960,680</b>	<b>7,096,846</b>	<b>(136,166)</b>
	<b>Total Liabilities and Net Assets</b>	<b>7,400,422</b>	<b>7,690,408</b>	<b>(289,986)</b>

First Unitarian Church of Portland

PRELIMINARY - Actual vs. Budget / pg. 1 of 2 / as of 05.31.2025

Prepared by Susan Matlack Jones & Associates (unaudited)

	YTD Actual	Annual Budget	Remaining Budget	% Bdgt Realized Expected: 92%
<b>Revenue:</b>				
Pledge Contributions	1,282,209	1,400,000	117,791	92%
Adjust to Accrual Pledge Contributions	-	-	-	
Non-Pledge Contribution	96,553	75,000	(21,553)	129%
Foundation Gift to the Church	-	100,000	100,000	0%
Plate Contributions	74,530	53,000	(21,530)	141%
Program Contributions (charitable)	11,148	11,000	(148)	101%
Program Income (non-charitable)	6,788	35,000	28,212	19%
Tenants Rental Income	307,616	385,840	78,224	80%
Deferred Lease Income	-	-	-	
Event Rental Income	20,663	25,000	4,337	83%
Merchandise Income	6,993	9,500	2,507	74%
Miscellaneous Income	2,522	-	(2,522)	
Reserve & Fund 49 Income	-	100,000	100,000	0%
<b>Total Revenue</b>	<b>1,809,021</b>	<b>2,194,340</b>	<b>385,319</b>	<b>82%</b>
<b>Expenses:</b>				
Payroll	1,375,548	1,618,529	242,981	85%
HR Expenses	21,079	26,800	5,721	79%
Professional & Contract Services	77,833	106,650	28,817	73%
Professional Expenses	9,641	17,250	7,609	56%
Professional Expenses - Sr. Minister	6,555	8,500	1,945	77%
Professional Expenses - Associate Minister	3,412	6,000	2,589	57%
Professional Expenses - Intern	-	2,000	2,000	0%
Guest Ministers, Musicians, & Speakers	7,830	16,000	8,170	49%
Interest Expense	-	-	-	
Program or Office Expense	15,495	96,051	80,556	16%
Retreat/Workshop/Conference Expenses	26,791	39,610	12,819	68%
Event Expense	9,526	9,000	(526)	106%
Parking	24,904	25,450	546	98%
Utilities	87,435	115,000	27,565	76%
Custodial Supplies	8,870	10,000	1,130	89%
Software/Web/Comp. Program	27,215	37,200	9,985	73%
Computers, Furniture & Equipment	6,997	18,300	11,303	38%
<b>(Cont'd on next page)</b>				

First Unitarian Church of Portland

PRELIMINARY - Actual vs. Budget / pg. 2 of 2 / as of 05.31.2025

Prepared by Susan Matlack Jones & Associates (unaudited)

	YTD Actual	Annual Budget	Remaining Budget	% Bdgt Realized Expected: 92%
Outside Printing & Copying	7,380	14,900	7,520	50%
Postage & Shipping	5,002	5,200	198	96%
Bank Charges & Merchant Fees	14,035	15,500	1,465	91%
Cost of Goods Sold	2,931	2,000	(931)	147%
Licenses & Fees	1,684	7,000	5,316	24%
UUA Dues	35,292	38,500	3,208	92%
Insurance	31,512	27,000	(4,512)	117%
Credit Card Rebates	(468)	-	468	
Donations/Plate Share	32,476	32,200	(276)	101%
Uncollectibles	-	-	-	
Miscellaneous Expenses	510	1,000	490	51%
<b>Total Expenses</b>	<b>1,873,060</b>	<b>2,360,340</b>	<b>487,280</b>	<b>79%</b>
<b>Transfers</b>				
Transfers from Other Sources	11,991	(166,000)	(177,991)	
Transfer to Other Sources	-	-	-	
<b>Total Transfers</b>	<b>11,991</b>	<b>(166,000)</b>	<b>(177,991)</b>	
<b>Change in Net Assets - Operating Fund</b>	<b>(52,048)</b>	<b>-</b>		
<b>GAAP Adjustments</b>				
Depreciation Expense	(257,460)			
Amortization Expense	-			
Interest Income	13,542			
Gain (Loss) on Investments	9,116			
Other Fund Revenue	32,013			
Fund Transfers from Other Sources Offset	17,625			
Other Fund Expense	(277)			
Fund Transfers to Other Sources Offset	(7,650)			
Reserve & Fund 49 Income	172,277			
Reserve & Fund 49 Expenses	(63,304)			
<b>Change in Net Assets GAAP</b>	<b>(136,166)</b>			