

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, 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 will 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. Results are presented in three sections.

- 1) Pages 2-11 present a review of the church year, developed from presentations at the Annual Forum on May 18, 2025. A link to the recording of the Annual Forum is provided. Each presentation provides an evaluation of how well our shared ministries are currently fulfilling our mission and end policies, with attention on projected needs in the years ahead.
- 2) Pages 12-17 summarize the results of the 2025 Congregational Survey in which 424 congregants assessed our fulfillment of the mission and end policies.
- 3) Pages 18-20 cover the Board of Trustees' comments on the progress and challenges of the year.
- 4) In the final section many of the 30 identified church groups within First Unitarian provided descriptions of their activities and accomplishments over the 2024-25 church year. Within our model of shared ministry, these groups are essential to the broad spectrum of programs congregants are engaged in at First Unitarian Portland.

We expect that these analyses will be useful in guiding the church visioning work planned for the upcoming church year. By discussing the current strengths and weaknesses relevant to sustaining our mission and goals, this report can help focus this visioning process and the strategic planning that will follow.

Annual Forum Report on the State of the Church

A recording of the 2025 Annual Forum is available here: [Year-end Congregational Meeting](#)

Opening Comments: *Board Moderator Leslie Pohl-Kosbau*

My goal as Board Moderator this year 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) establish a Right Relations Committee to help with conflict among members, staff, and ministers.

Former Moderator Mindy Clark presented findings to the Board and Congregation on the experience of other churches in reducing the Board size. 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. This task group will be an independent group of skilled people who will hear complaints from congregants and staff, when needed, to resolve disputes.

Over the 2024-5 year 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 a reduction in pledged income over the years. More committees will be formed from congregants to help with maintenance, stewardship, and programming.

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 18th, along with Bylaws changes to protect congregant information and reduce the number of Board members to nine.

State of the Church: *Rev. Alison Miller*

160 years ago, the idea of 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. 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 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.

We also established a 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 first two years navigating these transitional tasks felt especially challenging, but in the middle of this third year, we have shifted into a phase of development and growth. Growth is not just about numbers,

although we did happily welcome over 30 new members this year. Growth is also 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.

Here is just a glimpse of our progress on the priorities that we shared with you last year for 24-25.

We wanted to enhance our website, social media, and online communications while we were broadcasting worship on Boxcast, YouTube, and Facebook. We now regularly share posts about more and more of what we do on Facebook and Instagram. I hope those of you who are on these platforms will like and share our content. 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 among the many ways we address this goal.

We wanted to increase the resources, the time, talent, and treasure that we have to fulfill our mission. Our ranks of volunteers have expanded in many areas of congregational life this year, including Social Justice, Stewardship, Hospitality, Facilities, and more. 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. To our delight a congregant offered a thirty thousand dollar matching challenge. To the executive team's delight and surprise, the board said we'll match you, and asked the congregation to match the combined amount -- and you did. In addition, we just finished 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. 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 this year and on into next year.

We're going to launch "together time" every single week, beginning September 7th, when our children and families join us in the sanctuary at the beginning of every Sunday. The length of time will be shortened so teachers have 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 Leah, Jen and Bill Cunningham will teach it.

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 and the monthly Parents' Circle.

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. 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. This group will be meeting twice a month going forward.

We've aimed to deepen our collaborative Justice work, making denominational connections and interfaith partnerships. One example is 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 joined us last summer, and will return to offer a workshop this fall.

We are relaunching the denominational Affairs committee. The Downtown Clergy Association had fallen away because of the pandemic, but we are now meeting 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 was moving towards a renewed *Mission, Vision, and Strategic Plan* for our shared Ministry. The executive team has been meeting with Josh Reckord, who has experience engaging communities and institutions with strategic planning. We will be weaving together a team to work with the ET and the board to develop a focused understanding of who we are, and what our story is as a congregation.

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.

Reflections on the Past Two Years: Assistant Minister, Rev. Danielle Garret

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 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.

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.

Religious Education 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 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. 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*

What is it like to be in a choir? And the answer is you all 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 would be fun to share. The choirs have performed for 45 services since the beginning of September. In total, 102 pieces of music have been sung 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 the debut performance of the Sage Singers. There have been over 90 guests we've brought into this space that we've shared our Chancel with, shared our services with.

We're all aware of the journey that the music program has taken over the last year. It has shaped all of us. It has been really extraordinary to watch the regrowth and the rebirth this program has experienced. Last June we had about 90 people 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 peaked at 65. Now 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.

Social Justice Ministry: *Dana Buhl*

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.

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*

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), a team of congregants 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 is a social worker, lawyer, and professional mediator who led the formation of a Right Relations Committee for the Elliot

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. 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 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 is an independent committee that isn't controlled by 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, the 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 in volunteer work with other people from the congregation. I've gotten to know these people, and found it a deepening way of meeting your fellow congregants while working on things in which you have common expertise. Julia Spence has expertise in her world in doing human relations work. Corbett Gordon is a former attorney doing Labor Relations and employment law and Randy Russell works in corporate HR. Since January of 2024, we have been meeting to revise our Personnel Handbook 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.

Going forward we will work 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 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 Robinson, 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 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.
 - 1) Enlist in the program available through our bank to cover more of our cash in higher interest paying accounts that are insured by FDIC.
 - 2) 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.
 - 3) Strengthen Board and congregation knowledge of our financial status and reporting.
 - 4) 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.

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>.)

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.

Denominational 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, including 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, and develops 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. This will be the focus of the board starting this summer. We work with Reverend Alison 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, 52% of the 714 church members this year.

All Board of Trustees candidates were elected with 96% or more votes:

Julia Griffiths, Roger Robinson, Roger Tobin, Saranna Weller-Fitz

All Nominating Committee candidates were elected with 95% or more votes:

Ellen Zacny, Jo Ann Foor, Pierre Provost, Scott Eliasof

The 2025-6 operating budget was approved overwhelmingly by 96% of the vote. The Article 2 revision limiting access to the membership rolls passed with 94% approval, and the Article 4 revision reducing the board size to 9 from 12 passed with 97% of the vote.

Finally, Corbett Gordon was elected to the Foundation Board.

Congregational Survey 2025

The Governance Committee of the Board of Trustees performs annual surveys of our congregants to better understand their interests, demographics, and to assess 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 approach was an attempt to reach not only those currently attending in person Sunday Services but also on-line, as well as those mainly involved in some of the other aspects of the church program. Over the next three 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 that one could fill out at church or be sent one in the mail. The surveys were anonymous until the optional final question, when respondents could complete their name or email. Of the 434 respondents, 300 completed identifying information, which allowed us to remove 10 duplicate submissions (over three months some may have forgotten they previously responded). The remaining 124 responses without identifiers 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 two decades ago. All data in these analyses are by self-report of those who responded.

Survey Respondents: Extensive outreach over a three month period resulted in 424 survey participants. They identified by gender (65% female, 25% male, 3% other, 7% not stated), with an average age of 68.9 years (2.4% under 35, 9.5% 36-50, 17.4% 51-65, 70.1% over 65). 80% are members and 20% nonmembers. In marital status, 60% of respondents are married, 11% are single (never married), 14% divorced, and 15% 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 commonly attend Sunday services in person on most Sundays (43%), with a sizeable group at Sunday services 1-2 times a month (23%), and 34% attending less than once a month or on special occasions. Our on-line participants are a sizeable group of our congregation, with 14% participating most Sundays, 24% on-line 1-2 times a month, and 62% tuning in less than once a month or on special occasions. All together, 418 respondents report some Sunday Service attendance in person, while 383 are connecting at least occasionally online. 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. Sizeable groups have also participated in children's RE (32%), the Alliance (35%), and small group programs (38%). Many of our congregants have also served as ushers (21%) and have participated 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, 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.

Participants rated how well First Unitarian was doing in reaching their goals, with these average ratings (on a 5 point scale of agreement/disagreement):

	Average Agreement
Support was strongest for these aspects of church life:	
• Supports social justice in Portland and beyond	4.46
• Worship is inspiring, affirming, and deepening	4.32
• Supports all in search for truth in meaning	4.20
Support was also strong for these areas:	
• Is a welcoming and loving community	4.15
• Congregants are generous with time and money	4.09
• Religious education with UU values for all ages	4.08
• Cultivates leaders who serve and inspire	3.91
Support was lowest in these ratings:	
• Takes leadership in larger UU community	3.81
• Is transparent in church decision making	3.38

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

	Average Rating
Enhance our ministries in worship, music, social justice & spiritual education for all ages	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/connections	4.10

Within our 2025 sample, we can look at ratings of mission and goal fulfillment as a function of attendance regularity. Mean rating across all of the goals questions were 4.33 and 4.39 (out of 5) for those attending most Sundays in person and on-line respectively, and mean ratings of 3.38-3.60 for infrequent attenders in person and on-line.

We would expect people who attend infrequently to have less experience with how the church is performing in relation to its goals. Some members of this group may be attending infrequently because of ambivalence or even disappointment with their experience when they do attend services. We also know that the 2024-25 church year coincided with personnel changes that resulted in ongoing controversy through much of the church year. Indeed, some among the infrequent attenders reported on the survey that they had stopped attending First Unitarian due to staff changes.

Comparing ratings: 2006 versus 2025: A major motivation in adopting the questions from the 2006 survey was to enable a comparison between our current respondents and those who answered the same questions two decades ago. However, there was a major difference in the composition of the samples in the two years. That is, in 2006 respondents completed the survey while sitting in a Sunday service. In contrast, our 2025 sample was recruited from the extensive email list the church maintains for electronic communication, including regular attenders as well as those with minimal contact with the church.

To enable a fair comparison between our present results and the 2006 data, we looked at the ratings of the 254 regular attenders in our sample who reported attending services on most Sundays. Since our email contact list is so diverse, we found this subgroup to be most comparable to the 2006 sample responding in a Sunday service.

The table below shows the mean level of agreement of these 2006 and 2025 groups about whether First Unitarian Church is fulfilling its key goals. The religious education question is omitted since it was not included in the 2006 survey.

	2006	2025
Is a welcoming/loving community	4.48	4.45
Worship inspires, affirms, and deepens	4.80	4.70
Supports all in search for truth & meaning	4.64	4.51
Promotes social justice Portland & beyond	4.77	4.60
Cultivates leaders who serve & inspire	4.47	4.17
Congregants are generous w/time & money	4.43	4.28
Takes leadership in broader UU community	4.64	4.01
Is transparent in church decision making	4.35	3.64

Comparing the ratings between the two groups we see comparably high means for the first four goals listed: welcoming community, inspiring worship, supporting search for truth, and promoting social justice. Rating differences are modest for cultivating leaders and congregant generosity. However, differences between the two groups are sizeable for goals of taking leadership in the broader UU community and transparency in decision making.

In 2006, 19% of returned surveys either checked “don’t know” or gave no response to “Takes leadership in the broader UU community” which was a higher rate of failure to express an opinion than for most end policy ratings. The lower 2025 rating may reflect a growing awareness of our diminished leadership in the broader UU community. At the end of the church year, Art Unger stepped forward to rejuvenate the long dormant Denominational Affairs.

In 2006, “Transparency in church decision making” was the lowest but still quite positively rated end policy. In 2025 the controversy around the departure of the music director and other staff appears to have increased concern for transparency even among our regular attenders. Transparency was rated extremely negatively by many survey respondents who stated they were leaving the church because of it.

Considering national changes over the past two decades in church programs and function, we have an opportunity to consider how our congregants engage with programs at First Unitarian in the 2025 and 2006 samples. The table below compares the two groups on what keeps them coming back and the activities they have participated in over the years.

What keeps you coming back?	Regular attenders 2025	2006 Respondents	What do you participate in?	Regular attenders 2025	2006 Respondents
Spiritual growth	58%	85%	Adult RE classes	50%	39%
Sunday Worship	80%	74%	Small Group	44%	7%
Community	77%	82%	Choir/Music Program participation	25%	24%
Social activities	29%	28%	Children’s RE	27%	38%
Intellectual Engagement	48%	52%	Alliance	42%	21%
Social Justice	47%	30%	Volunteer Service	51%	25%
RE for children	12%	N/A	Social Justice	51%	30%
Music Program participation	17%	N/A	Social Activities	48%	28%
Support in transitions	15%	N/A	Hospitality/Ushers	25%	19%
Adult classes	22%	N/A	Art Wall	9%	N/A
Volunteer Opportunities	33%	N/A	Lay Ministry	13%	N/A
Support in difficult times	31%	N/A	Outreach/media	3%	N/A
			YRUU	7%	N/A
Average age	71.6 years	51.6 years	Governance	15%	N/A
Years attending First U.	18.6 years	7.4 years	Stewardship	13%	N/A

When asked what keeps people coming back to church, most consistent draws are Sunday worship and the church community (74% - 82% for 2006 and 2025 samples). However, the two groups are quite different in interest in spiritual growth at First Unitarian, cited by 85% of the 2006 group vs. 58% in 2025. Considering the centrality of spiritual growth to the church's mission, this is a trend worth further discussion.

We see an increase in interest in social justice activities from 2006 to 2025, from 30% to 47%, while interest is steady in intellectual engagement over the years (52% and 48%). Social activities are less of a draw in both groups (28% and 29%)

Respondents show higher participation rates in the 2025 sample compared to the 2006 group in most of the activities listed, including Adult RE (50% vs. 39%), small group (44% vs. 7%), Alliance (42% vs. 21%) volunteer service (51% vs. 25%), social justice (51% vs. 30%), social activities (48% vs. 28%), and hospitality/ushers (25% vs. 19%). Choir/music program participation is at a constant level over the two samples (25% vs. 24%). The one area of decline is in children's RE (27% vs. 38%). However, note that the 2025 sample has had more than twice as many years to participate in the variety of programs offered at First Unitarian (18.6 vs. 7.4 years), likely contributing to their higher reported participation rates.

Perhaps the most striking finding of our 2025 survey compared to 2006 was the aging of all respondents (average age 68.9 years) and those who are frequent attenders (average age 71.6 yrs) compared to the 51.6 year average age in 2006. In 20 years the congregation appears ~ 20 years older. Many of the differences noted in the two samples may be linked to fact that the respondents are at different stages of life concerns.

Our survey findings show several trends worthy of further consideration as we look back on our 2024-25 church year and to the years ahead. These data can be particularly rich food for thought in our upcoming strategic planning as we develop a vision of our future and plan strategies to move forward.

September 2025

Board review of the year's progress for First Unitarian

Considering the findings in this review of the 2024-25 church year, the Board of Trustees offers these thoughts on our progress on Mission and Ends policies.

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 this 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 some people were hurt, and some 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 to engage on 8th Principle work, including learning about systems of oppression. Hundreds of people from our congregation and beyond have studied together in the circles. Jody Feldman and many volunteers deserve credit for this work. Our Acting Director of Family Ministries, Leah Ongiri, is planning more adult programs for the 2025-6 and future years.

Social justice: Our program is strong and is one reason many people gravitate to First Unitarian. Indeed, social justice programming is the highest rated activity in our survey of congregants. Active letter-writing to turn out voters for the fall elections, the Sewell Lectureship on abortion rights, and on-going committee activities were some of the highlights of this year's SJ work. In the final months of the year First U began participating as a visible group in support of democracy in Portland demonstrations about current trends in the federal government.

Although the Church exhibits strengths in working for our Mission, we fell short on some of our long-term Ends policies. Three 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.

There has been a longstanding concern about transparency in the church, which has manifested at times in a lack of trust in the leadership. Serious disruptions at a church service in June 2024 occurred when the mutual separation agreement and departure of the Music Director was announced. This event occurred despite the lengthy deliberative processes the board and the executive team underwent throughout the prior year and a half to arrive at difficult decisions. Concerns were also expressed about the departure of RE staff. The Board and staff struggled with how to respond to ongoing dissent with loving hearts, finding that we did not have good procedures in place when we needed them.

In July 2024, our regional staff were invited to assist with de-escalation and to help us to understand the need for clear boundaries, covenants, and how to set up our music program with healthier professional and lay leadership structures in the future. Plans are in place for a workshop by our regional UU staff for the First Unitarian congregation and staff on healthy boundaries.

Our governance committee of the board convened a Right Relations Taskforce in October 2024 to come up with recommendations for a structure and process to help our community be better able to navigate conflict and maintain healthy boundaries in the future. We are making progress toward our goals of restoring trust and healthy boundaries with the recent adoption of the recommendations from the Right Relations Task Force on the formation of a Right Relations Committee. The Committee members have been identified and approved allowing the Right Relations Committee to begin its work in September 2025.

In addition, we made progress in ensuring decision-making processes are transparent and clear. Over the course of the 2024 – 2025 year, we held regular forums and meetings to move in that direction. We also identified the need to reflect in the coming year on how we are currently implementing policy governance in order to identify changes that could lead to greater transparency, clarity about responsibility and authority, and inclusion of more voices when possible.

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 ending June 30, 2024. This last year was better, but we remain unable 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.

At the very end of the year we learned that Northwest Academy, our principal renter, is seeking to cut its annual rent in half, and may consider moving their Middle School out of our space in the future. Coordinated planning on building use and rental opportunities needs immediate attention to achieve sustainability.

3) Provides religious education with UU values for all ages.

The average and median ages of our active church membership is now about 70 years compared to 51 years in the 2006 survey. This aging of the congregation needs to be addressed in both short and long-range plans. Covid disrupted an active adult RE program that congregants valued highly. Adult programming needs to be rebuilt to meet the congregants' needs, particularly the needs of our large number of retired congregants. Similarly, Covid and last year's disruptions of the RE program over church personnel contributed to a decline in our children's RE program. The church must develop programs that will attract young parents and their children so that the church can become more multigenerational once again.

Annual Report of Groups in the Church

Advancing Racial Justice Action Group (ARJAG)

Coordinating Team: Ameena 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.

The Alliance

Contact people: Evie Zaic, Harriet Shaklee

Team: Evie Zaic, 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; 3rd 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 Latina 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 programs 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 individual contributions, the Alliance Allocations Committee had the happy task of giving away \$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 - **Danielle Garrett** speaking on her experience with pilgrimage.
- December 11– **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, 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.

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 100th 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 flatbed scanner from the Alliance funds, and index material for research.

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 price on greeting cards goes to the Church's general fund. The Bookstore has been part of First Unitarian for more than 60 years.

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

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: Organizational meetings are held Sundays before church on the second Sunday of the month. Additional sessions for deeper exploration (e.g., guest speaker, discussion, restorative session) are held on the 4th 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 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: 1) 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** – April 2025, provided weekly articles 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 values at 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 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.

CARD (Care and Action for Reproductive Dignity)

Contact people: Marni Tapscott marni.create@gmail.com; marni.tapscott@yahoo.com Holly Brewster 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 4th 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 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 of 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.

First U Gardening Group

Contact people: Laurie Lester (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!

The First Unitarian Church of Portland Foundation

Mission: The Foundation was founded in 2001 as an independent non-profit 501(c)(3) organization. It provides the church an annual gift to the operating fund of 4%-5% of the endowment's value and provides other 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 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.

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

Immigrant Justice Action Group

Contact people: Laurie Lester, Mary Ann Barham , Lynn McClenahan E-mail: 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.

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 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, emphasizing anti-racism and inclusivity.

First Unitarian Men's Community



Contact people: Richard Turner (751candyman@gmail.com), Mark Barham (markbarham49@gmail.com), Michael Krauss (krauss@lclark.edu), Bob Bonner (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 4th 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 Tye Mountain Lodge

Plans for the near Future:

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

Peace Action Group (PAG)

Contact: Tess Beistel facilitator 503-257-2042 (H)

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

Mission or purpose

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: 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.

Social Justice Collaboration Team

Contact people: Dana Buhl: dbuhl@firstunitarianportland.org, Mary Ann Barham: mab8150@gmail.com
Scott Eliasof: 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 5th Hands Off Day of Action.
- Several groups of congregants went to Salem for the April 7th Sacred Organizing Coalition Advocacy Day and the April 29th 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.

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 having building tours so they are familiar with all exits from the Sanctuary and Fuller Hall where people can be directed in an emergency.

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 process, and make sure our team is fully staffed and trained.
