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MISSION OF THE CHURCH AND ENDS STATEMENTS

Given our long and distinguished history in Portland, we covenant together:

- To create a welcoming community of diverse individuals;
- To promote love, reason and freedom in religion;
- To foster lifelong spiritual growth; and
- To act for social justice.

The mission of First Unitarian Church of Portland, Oregon 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. Accordingly, First Unitarian Church:

- Is a welcoming and loving community that provides a safe haven where a diverse people of various ages and cultures may gather to build nurturing relationships.
- Offers lifespan religious education consistent with Unitarian Universalist values, and provides a forum for exploring diverse points of view.
- Provides worship that is inspiring and affirming, as well as a variety of experiences that invite congregants to deepen their spiritual lives.
- Uses transparent democratic processes that maintain shared governance and ensure that all voices are heard and respected, and that clearly define the roles and responsibilities of congregants, the Board, staff, and ministers.
- Cultivates and nurtures leaders who serve and inspire the church community.
- Is a sustainable church community in which congregants, Board, staff and ministers share stewardship of both our tangible and our human resources.
- Takes a leadership role in the larger Unitarian Universalist movement, maintaining connections with other Unitarian Universalist congregations and institutions as well as the local interfaith community.
- Witnesses as a voice of conscience in our community and beyond, collaborating with other justice-seeking institutions, encouraging congregants to join others in building a more equitable, sustainable, and peaceful future for all.

Executive Team Report

– Rev. Bill Sinkford, Senior Minister

This year has been marked by continued high energy in all the areas of our ministry. Sunday attendance continues strong, participation in the Learning Community and Adult Education increased over last year, more new members joined than in recent years, we’ve added a new Women’s Choir and additional vocal ensembles, and our liberal religious voice remains prominent in the public square. The dedicated staff and committed volunteers that make our life together so rich have been hard at work. Considerable energy has also been devoted to planning for the financial sustainability of First Church, discussed in some detail later in this report.

The times continue to be challenging both economically and spiritually. We continue to respond in a robust way, grounded in our Unitarian Universalist faith and values.

This report begins with a review of developments and progress on the five major priorities identified in the ministerial search that resulted in my call, now almost two years ago.
Greater Spiritual Depth
This goal continues to be central to our life as a religious community. The use of monthly spiritual themes is well established at this point. This year our themes have ranged from “God” and “prayer” to “evil” and “redemption.”

Sunday worship attendance has sustained the significantly higher level of last year. The addition of the 11:15 Chapel service has made more seating available in the sanctuary for the on-going stream of visitors and seekers. The Chapel service, which has averaged 72 in attendance, is beginning to develop its own character: more intimate, somewhat less formal, with a greater range of music. It has been a year of learning how to do that service well. Our hope is to continue that service next year, strengthened by our learnings. Final evaluation will be in the context of our budgeting process which is in process as I write. In addition to requiring substantial additional volunteer time and energy, there are significant financial costs as well, especially in the music area.

Mid-month, mid-week evening services have also been led by our intern minister, Amy Beltaine. While attendance at these services has generally been modest, those who have attended report that they have been meaningful.

The addition of lay “worship assistants” has increased our worship leadership capacity in both the Chapel and the Sanctuary. Despite some unevenness, feedback has been strongly positive from both the congregation and the worship assistants.

In January, we hosted “Seminary for a Day,” an opportunity for congregants from all area UU churches to “go deeper.” The day was sponsored by Starr King School for the Ministry and featured Rev. John Buehrens as major presenter. The day received unanimous praise from the almost 200 in attendance. Conversations are underway to repeat this event next fall, featuring faculty from Meadville/Lombard Theological School, our other UU seminary.

Our spiritual connections to the larger Unitarian Universalist community were deepened by visits from Bruce Knotts, Executive Director of the UU United Nations Office and Rev. Bill Schulz, President of the Unitarian Universalist Service Committee.

As we look toward the next year, a new look at how we do and support small group ministry will be on our agenda.

Public Witness
Through much of the fall, Occupy Portland and the Occupy movement generally focused the energy and engagement of our community. Under Rev. Kate Lore’s leadership, First Church was a primary support for this grass roots movement. It is hard to overestimate the importance of our voice. To give just one recent example, the protest over the re-instatement of the police officer who shot Aron Campbell two years ago, was led by the Albina Ministerial Alliance, as it should
have been. But of all the other clergy in Portland, there were three in attendance, two of them from First Church.

The social justice report below covers the many other justice activities of the church.

**Intergenerational Engagement**
This continues to be a work in progress. Having social hours in both Fuller Hall and the Buchan Reception area has helped reduce the sense of being “two congregations” and the “family” chalice lighting is a symbol of our commitment that has become an expected part of our worship life. But we continue to be in learning mode. The intentionally intergenerational service on the Sunday following Thanksgiving was very well received. Other attempts have been uneven. Our plans for next year include 3 fully multi-generational services, but we are also including several services when special programming for children will be offered. The challenge this year has been to bring intentionality to our planning. We hope to do better in the coming church year.

**Diversity**
Three additional groups of congregants experienced the Beloved Conversations curriculum last fall and winter, bringing the total to four. The staff and board have also engaged this process. The results of our work to date have been reviewed with the Board of Trustees. One additional congregant group is planned for next fall. The relatively small (but growing) number of persons of color in the congregation limits our ability to expand this program. We are increasing the number of “all congregation” events to maintain and build broad engagement with this topic. The “Freedom Riders” exhibit is a good example. (See the Social Justice report for additional information and opportunities)

Rev’s Lore and Sinkford will participate in a workshop at the UUA’s General Assembly presenting and promoting the Beloved Conversation process for use by other UU congregations.

**Growth**
The new service in Eliot Chapel has been the primary effort on this objective this year (See comments above).

**Attendance Numbers**
Our Sunday worship and strong education and justice ministries continue to draw people to First Church, but we have not had an adequate way for many people to deepen their involvement. Making your way into this large system can be a challenge. We are looking toward a solution that both increases awareness of the many good opportunities for involvement we now offer as well as offering an on-going program of small group ministry which can become an entry point into deepened relationship.

**Financial Sustainability**
Much ministerial, staff and volunteer leadership energy has been focused on the financial challenges facing us. These include: re-financing the debt on the Buchan Building (required by April, 2013); the loss of Northwest Academy, our long standing weekday tenant in the Buchan
Building (June 2013); shortfall in our Annual Fund Drive versus budget, despite the generous response of the congregation to the final matching effort (with immediate impact on our spending).

There are clearly many “moving parts” in our financial planning. Here is an overview of steps we have taken and upcoming planning/decision points:

**Bring our expenses for this year (FY12) within our income:** Complete
- Reduce pension contributions from 12% to 10% of salaries (Full Year)
- Roll-back 1 ½% Cost of Living increases for salaried staff (Effective 4/1/12)
- Reduce UUA and District Dues to FY 11 level
- Re-configure two staff positions (Full time to ¾ time), eliminate one part time position and one sexton position
- Tightly control discretionary spending
- These changes, which will be on-going, help the development of a balanced budget for FY 13, but they do not cover the expense of the new mortgage on the Buchan Building.

**Develop balanced budget for FY 13:** Complete
- The Board of Trustees approved the budget which is included for your approval.
- Pledge income assumptions are reasonable to conservative; increased revenues from music and Adult Education fees and revenue generating activities are planned; we have also deferred eliminating the Learning Community fees for members. Anticipated interest cost for the re-financing (full year) has been provided.
- Costs have been reduced in a variety of ways: an additional modest but painful salary roll-back for all salaried staff and reconfiguration of additional staff positions to less than full-time. The financial impact of these staff changes is reflected in the “Additional Adjustments” line.

**Securing a new mortgage:**
- Conversations with several banks (both national and local) have begun. With Board (and congregational) approval of the budget, application and negotiation can begin in earnest.
- Several groups of congregants are being asked to make pledges/contributions to reduce the Buchan debt: those who have joined the church since the capital campaign was completed; those who have recently completed their pledges; those who, for a variety of reasons, discontinued their pledge payments.

**New Tenant:**
- Negotiations are underway with two potential additional tenants for space in the Buchan Building for next year (FY 13). Replacing the entire rental income from Northwest Academy ($100,000/yr) for the FY 14 remains uncertain.

As I indicated, there are many “moving parts.”
Although we are working hard to streamline operations, you should know that there will be less staff capacity in the coming year(s). You will also see increased costs for our programming (scholarships will continue to be available) and additional fund-raising activities.

Your staff has demonstrated extraordinary understanding, commitment and patience throughout this process. Each of them will feel the impact these reductions. Please hold deep thanks for their work in your hearts and understanding as we move toward financial stability and sustainability.

**Board of Trustees**  
– Shirlee Geiger, *Moderator*

The Board has worked well together this year, initiating or continuing work on a variety of interesting and exciting projects.

We began our work, at our annual retreat in late summer, taking a “big picture” look at our church to ground us as we formulated our annual goals. In conversation, we realized that the transition set in motion when Marilyn Sewell announced her retirement in 2008 is not yet fully done, and that we needed to treat Bill's second year as our senior minister as a *continuation* of this transition. Given this recognition, we pledged to “articulate clear channels for expression of concerns, ideas, and aspirations” for congregants. In addition, we adopted the following board goals.

This year, we seek to:

- Develop and implement innovative methods to engage and listen to congregants, especially with regard to church goals and changes being introduced during this church year.
- Partner to create and support a new financial plan that ensures long term church infrastructure and sustainability, while communicating needs as well as the concept of generosity as a spiritual practice to our congregation.
- Develop ways to gather data to use as a baseline for future initiatives.
- Work to envision a deliberate, broad-based leadership development system, suitable for a church of our size, in collaboration with the Nominating Committee and E.T.

For the first and third goals, we created an annual survey, which we will pilot this year. Our plan is to offer it in conjunction with the yearly congregational vote in the spring. We will follow up with cafe conversations, in order to get deeper insight into experiences and thoughts of church members and friends. We will use what we find to help inform the process of setting Board and Church goals, in the next annual retreat.

Additionally, our Communications Committee, working Craig Towers and Kathryn Estey, revamped the board presence on the church website, offering more information about Board work and providing new channels of two-way communication.
The board work on leadership development was headed up by Jim Shorr, who has chaired an ad hoc board committee with wide representation from groups around the church. They have met to consider the needs of the church, and to survey ways to meet those needs, with the goal of bringing recommendations to the Board and the Executive Team. Recognizing that well-supported and committed leadership is vital to the well-being of a church our size, this work on leadership development will be on-going. We give thanks for the wonderful preliminary work on this by the Nominating Committee, and for all the participants who said “yes!” to Jim’s request to serve on this committee.

Some of the most challenging work for the board this year centered on our second goal, concerning church finances. Recognizing the need to refinance the outstanding balance for the Buchan building, the board and the executive team considered both (i) which decisions would make the most sense for both the short and long-term, and (ii) how to communicate with the congregation. Our decision was to seek a new loan, with a different institution, in order to take advantage of better interest rates currently available. Additionally, costs for that loan would need to come from the church operating fund, instead of from a separate capital campaign fund, as pledges were either paid in full, or (given the economic downturn) written off as “shrink.”

Reverend Sinkford explained the financial situation in a weekly blog post, made a pulpit announcement two consecutive Sundays, and then Board members made themselves available in coffee hour to talk over the situation with any interested or concerned congregants.

Separately, the Annual Fund Drive raised slightly more money than the previous year – a wonderful result – but less than the fund goal. As a result, immediate changes needed to be made in church operations, to insure that we did not run a deficit for this year, per our policy requirements. And difficult decisions have to be made regarding cutting costs for the next fiscal year, beginning in July. The Board decided to hold an extra meeting to consider the proposed budget, prior to offering it to the congregation for a vote. Our communications committee worked hard on ways to communicate with the congregation about the difficult decisions reflected in the budget.

The church is in wonderful financial shape, given the reality of the worldwide economic downturn, which has affected non-profits along with everyone else. But given the reality of this economic climate, the Board recognizes that our transition to our envisioned spiritual outlook of “abundance”– instead of a mentality of “scarcity”– will take longer than we had hoped.

Each meeting, a member of the Board is appointed as a “process observer.” We end each meeting with a report from that observer. This year, our observers have noted that we generally stay focused on appropriate concerns (given the function of a board in policy governance), that all board members participate in our deliberations, and that our conversations are respectful -- both when we agree and when we disagree. From my point of view, service on the Board at First Unitarian is a source a deep delight and satisfaction. Board members come with different gifts,
different experiences, and shared love of what brings us together – this beautiful, engaged, and transformational spiritual community.

**Adult Programs**
– Katie Radditz, *Director*

Adult Programs offer ways for people to continue to learn, to deepen their spiritual lives, and to gather as community members by participating in classes, retreats, and small group ministry. Our mission is to enhance opportunities for making meaningful connections between congregants and to deepen our spiritual lives.

This has been a strong year for attendance across the board in Adult Programs. Total participation in classes and retreats is up 20% (30% if the participants are included for Seminary for a Day). Last year a total of 990 people compared with 1,240 registrations were processed for classes and retreats. This does not include summer programs since this was the first year.

**Classes**
- Thirty-eight classes were offered this Fall, six more than last Fall. We added in UU for Newcomers and Path to Membership as classes as well as Our Chosen Faith, which raised the number of classes significantly, but not the income since the UU classes are free to all.
- This Winter/Spring we offered 45 classes, 10 more classes than last Spring. A few classes were added at the beginning of April with the goal of bringing in more income to help with the deficit.
- Class offerings this year included 10 core Unitarian Universalism, 16 Religion/Philosophy, 9 Body/Soul/Spirit, 9 Social Justice, 10 classes for developing life skills such as learning Spanish and the Enneagram, 7 on Transitions and End of Life issues, 16 around the Arts.
- Total registration for classes is up 13% from last year. Highest attendance was for classes led by Ministers including Zen and Being, led by Rev. Bob Schaibly and Katie Radditz, Re-Imagining America: Her Story, Our Selves taught by Rev. Preston Moore, and the classes offered both Fall and Spring on Our Chosen Faith by Rev. Bill Sinkford. A few Special classes offered this year by guest teachers filled to capacity: The Lyric Life writing workshop with Kim Stafford, a Quantum Physics class taught by retired Reed professor, David Griffiths, and a class on Being Present in the knowledge of Dying, facilitated by Betsy Toll. Only six classes canceled because of low attendance, about 25% less than average cancellations.

**Retreats**
- Nine Retreats were held this year – 3 per season, excluding summer. These included our regular Shakespeare Retreats in Ashland – one during the Fall, one in the Spring. A Women’s Retreat, Family Retreat, Men’s Retreat, Day of Mindfulness, and Yoga Retreat
were held at three different Retreat Centers. The Mindfulness and Writing Retreat was our first time having a weekend-long Retreat based on meditation and writing.

- The number of participants this year for Retreats was almost even. The Leadership Retreat was offered this year for the Leadership Council as a ministerial program rather than an Adult Programs Retreat. And the Shakespeare Retreat was smaller because of the lack of ticket availability. The Permaculture / Sustainable Community Retreat were postponed till summer. But the Family Retreat was double the size of last year and the Writing/Mindfulness Retreat was also larger than usual.

**Special Events**

- Lectures, readings, and presentations, cosponsored with other community organizations, support our UU mission to be a voice of conscience, to embrace diversity, to deepen our spirituality, and to seek truth and understanding.
- Fall 2011 - In September we had a lecture on Meditation by visiting author and teacher Stuart Perrin. In November there were two events. Poet William O’Daly read translations of Neruda’s poetry after readings of the poems in Spanish. O’Daly then led a Reading in Translation/Writing Workshop on the following Saturday. Also we sponsored Multnomah County Library’s annual International Storytellers Festival which filled the Sanctuary. In December we cosponsored an evening of readings with writers from Fishtrap held in Joseph – Oregon’s premier writers’ organization outside the Portland area - with special guest author Luis Urrea. Several of our first Church members participate in Fishtrap’s summer programs.
- Winter/Spring 2012 – In January we celebrated William Stafford’s birthday with poetry and lectures in cooperation with the Friends of William Stafford. During February, we held a live telecast conversation through SKYPE in the Eliot Chapel with Ram Dass on Living and Aging.
- April and May we will sponsor four special events including Irish Storytelling with Will Hornyak, a presentation by Melanie Joy on Ethical Eating, an evening of readings by author and naturalist Amy Stewart co-sponsored with Tin House and Portland State University, and Amad reading from his memoir on growing up Muslim in England. In June we will celebrate the life work of Adrienne Rich and cosponsor a seminar on End of Life rituals. The annual Pie & Poetry event will wrap up the church year where congregants from the church writing groups will share pieces written this year hosted by the Church Poetry Group.

**Seminary for a Day**

- The last week in January, First Church hosted Seminary for a Day – in cooperation with Starr King School of Ministry. Twelve teachers including keynote speaker John Buehrens and Rev. Bill Sinkford offered a total of 12 classes. Just over 175 participants attended from UU churches around the Northwest.
- Classes included UU history, Process Theology, Poetry and Writing, Listening with Compassion, Drumming, and Social Justice issues.
The National Freedom Riders exhibit was brought by Roosevelt High School students who also exhibited their written responses and University of Portland interviews with local Freedom Riders.

Seminary for a Day was a new Program, very successful, which we hope to stage annually or every two years in some cooperative fashion with other UU organizations.

**The Adult Programs Committee**

The Adult Programs Committee has a goal this year of ensuring participants are given opportunities to make deep connections with others and to find meaningful experiences in classes, retreats, and when visiting the Adult Programs table on Sundays. In order to facilitate this goal, Rev. Sinkford and Lil Hosman led a workshop on creating trust, building community with small group speaking and deep listening, and nurturing spiritual practice with practical application. Katie is checking in with each teacher to see how they might need help or to talk about ways to make these connections in different kinds of classes. The committee members are stewarding and writing in reflection on what has worked well this year and how they have been personally affected. These experiences will be shared on the web.

Along with teaching classes, stewarding classes, raising funds for the scholarship fund, and being a welcoming presence on Sundays for getting involved at church, other highlights of the committee members’ work this year include:

- **The Labyrinth** walk, every first Sunday morning of the month, is increasingly well attended. The Friends of the Labyrinth provide handouts for the monthly sermon theme and help direct those who are new to walking meditation.
- **Publicity** and bulletin boards for classes, retreats, and special events; Web news items; and on-line registration have been a focus for increasing visibility for everyone.
- **Cooking and serving** once a season at the Goose Hollow Shelter as well as gathering food donations from certain classes in order to share the abundance of good food as well as raise awareness of the hunger issues around us.
- **The Booksale** raised $383.61 from the Baker Boyz that goes to Men’s Retreat scholarships and $3,210 from the book and media sales, total $3,593 which came to $100 over last year's total. The proceeds go toward the scholarship fund for classes and retreats. 10% is reserved for the libraries. We had a strong steering committee in Ron Hall and Keith Abernathy with more than 30 volunteers as well as the Adult Programs committee members, Sarah McKenzie and Lynn Sherwood helping all through the year.

**Good Times**

- The Good Times committee has met monthly and worked on restructuring procedures to ensure a welcoming presence on Sundays and during Good Times Activities. Thanksgiving dinners were offered by congregants in 8 homes and served about 20 people. The Committee organized a special coffee hour for Christmas Day to ensure everyone feels they have fellow UU’s and friends with whom to enjoy the holidays.
- Since the Committee and activities function year round, our leadership coincides with the calendar year. Mary Post became chair in January and the committee is adding additional members. We enjoy meeting new members and visitors to First Church and see our mission as both an extension of the Membership Committee and also a social ministry. Many of our participants find that we provide a segway into the larger community
Carolyn Rondthaler spearheaded the creation of a trifold brochure that tells all about the Good Times Committee, available at the Table in Fuller Hall. We continue to encourage folks to coordinate an event of interest to them. This way a variety of activities can be offered.

Our goal for 2012 will be to explore the option of more coordination with other Church committees to offer intergenerational activities and a variety of activities leading to a greater sense of community.

**Good Times Activities Included**

- Recurring Dining Out Events: 10
- Potluck Circle Suppers: average of one supper/month
- TGIF at Portland Brew Pubs – average of 10 people weekly
- Book Group – average of 6-8 people
- Sporting events Trail Blazers, Golf
- Hikes in and around Portland: average 15-20 each hike
- Garden Tours in and around Portland: 2 X 11 participants
- SOLV Beach Cleanup in support of Confluent Congregations
- Concerts in the Park & Picnic suppers: average 5/concert
- Mt. Hood Railroad ride and lunch: 13
- Maryhill Museum: 13
- Oregon Historical Society Museum: 8
- Portland Story Tellers: 8
- Plays, e.g., “A Lesson Before Dying” 4 X average of 10 attendees

Respectfully submitted, Mary Post, Chair

**Beacon Bookstore – submitted by Donna Deacon, chair**

The bookstore expanded this church year by adding a bookstore “Annex” in the Buchan Reception Room in October. It has been open every Sunday after each service, except for a few times when an event occupied the space.

We have 20+ dedicated volunteers, and we use 7 volunteers each Sunday.

**We see the Bookstore mission as four-fold:**

- be a welcoming place for newcomers where they can learn more about our church
- be a service to our congregants by carrying books for their religious and social justice pursuits, along with class books
- provide some revenue for the church
- sell and distribute materials for many other committees and groups in the church.

Sales thus far this fiscal year are just over $20,000: 78% from our main bookstore; 13% from our new Buchan Annex; and 9% from the special event, Seminary for a Day.

We have experienced a decrease in bookstore revenues over the years, due in part by the economy, the trend of online book purchasing and e-books. Yet, I believe we are continuing to succeed in our mission outlined above.
**Channing Library and Blue Sky Library**
Through the work of a few people and wonderful book donations the library volumes have grown two fold. The Blue Sky Library is about two thirds full now with many new children’s books, a Cuba shelf, a larger Buddhism shelf transferred from the Meditation group, a Writing section, and UU and Social Justice books from the Hollingsworth collection.

**The LREDA Conference**
It was a wonderful weekend of camaraderie to share programs and experience with other UUARE and Life Span directors. Sustainability – the environmental as well as the personal and spiritual–was the theme for a writing workshop Katie offered to several participants. It was valuable to coordinate with Cathy and Dana across programs.

**Small Group Ministry**
This year we have three new Women’s Circles which opened up to new members. Lil Hosman led a class based on Evensong to introduce people to the idea of covenant groups. One covenant group started up by the participants in the Meditation classes led by Kris Armetta. Another has been started by a long time UU who is new to the church. A Resilience Circle will be started this Spring. Katie has compiled a list of small groups that meet at church or elsewhere but gather as a result of involvement at church. Contact names will be gathered by the end of the year for each group and shared with the Leadership Development team.

**Summer Programs**
This was the first season of Adult Summer Programs offered at First Unitarian. It served our summer congregation in a new way they have not experienced previously and helped people feel connected all through the year. The mission was achieved to include those who are regulars through all seasons and to welcome new visitors and members of church.

Jeannie Leeper volunteered as coordinator and the Adult Programs committee members supported. The light schedule of six offerings with no formal registration and no fees worked well and was appreciated. Some of the participants and instructors were new and others old friends of Adult Programs. All the facilitators donated their time to lead the classes, but we took a donation to cover our one out of town teacher. Donations were also given to the church for the venue.

**Summer classes offered included:**
Eight weeks of T’ai Chi with Banks Upshaw and Jim Shorr, a Mediation Class with a guest teacher, a Flower Arranging class with Jeannie Leeper, an art class with Karlene Lusby, culminating in a Vegan Picnic with talks on ethical eating by Rev. Bob Schaibly and Steven Storla. Along with the Adult Programs Committee, Katie is now planning to offer summer programs again in 2012 with the help again of Jeannie Leeper and Sarah McKenzie.

**Administration and Finance**
– Kathryn Estey, *Church Administrator*

The mission of the church’s Administration and Finance staff, along with many volunteers who work side by side with us, is to support program staff and congregants in a number of arenas:

- Finance & Stewardship
Zaida Cooper has continued in her key role as Controller. At the end of our FY12 third quarter (3/31/2012), actual fiscal year-to-date operations showed a slight net cash surplus. Operating income is under budget, due mostly to the shortfall in our 2012 annual fund drive. Operating expenses are at budget through March.

<table>
<thead>
<tr>
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<th>ACTUAL OPERATIONS YEAR TO DATE</th>
<th>BUDGET YEAR TO DATE</th>
<th>ANNUAL BUDGET</th>
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</table>
The budget for Fiscal 2013 – which you’ll find on pg.30 of this Annual Report – reflects a conservative estimate of pledge and contributions income, an increase in program income based on the need to increase program fees in the coming year, and incorporates the likely interest expenses tied to our refinancing of the Buchan Building debt. It also incorporates some scaling back of staff and program expenses. (See a fuller explanation of our financial situation in Rev. Sinkford’s Senior Minister’s Report above, pg.3) Projections into the future reflect the loss of rental income from long-time tenant Northwest Academy, which is moving into their own building in September 2013, and a gradual restoring of that income over time.

Pauly, Rogers once again conducted our annual audit, which identified no significant deficiencies. That said, your Executive Team, finance staff and the Board’s Finance Committee are working to improve clarity of our financial reporting systems and to find ways to communicate financial information to the congregation in a more “user-friendly” fashion.

Mary McFarland continued as Development Officer this year. New to our stewardship efforts were the addition of on-line pledging and the formation of a stewardship committee comprised of Warren Bacon, Kathy Couch, Bill Harris, Laura Milne, Jean Omelchuck, Roger Robinson, Randy Russell, and Ron Yoder (chair). Committee members played a key role in our annual fund drive planning and execution, and served as mentors to our largest-ever team of fund drive advocates. Kathy Ludlow and Eric Terrell ably and energetically served as co-chairs of our annual fund drive which – despite falling short of budget – was our most successful drive ever, and raised over $1.393 million including the January challenge grant. The average pledge per household, however, continues hovering around the $1,300 level. By concluding our annual fund drive in early February, we are once again able to focus on the church’s Foundation during the spring. (See the Foundation’s Annual Report on pg. 34 of this document.)

Our House & Grounds team has had a productive year. Holli Nicknair, our Rentals and Community Bridges Manager, has successfully hosted a number of large and small conferences in our Eliot Center/Buchan Building. Word of mouth among high-tech educational groups in particular continues to attract new people and organizations interested in using our beautiful spaces for their events. For example, this year we hosted Puppet Labs, BarCamp, and Open Source Bridge – all technology conferences.

As this report goes to press, we have just said farewell to Facilities Manager Gardner Grice, who left First Unitarian to accept a new position. Gardner ably served the church for twelve years, and we will miss him. We’re pleased to announce that Jason Chapman, Lead Sexton for the past year and a half, has stepped into the Facilities Manager role. Major projects completed by our facilities team this year include the installation of handicap-accessible doors into our Sanctuary and Eliot Chapel buildings, replacement of the Fuller Hall windows with glass brick, and the upgrade of our audiovisual equipment to enable a successful transition to a third Sunday service in the Eliot Chapel. The team also dealt with a “mini flood,” resulting from an overflowing
drainpipe on our Sanctuary building during a torrential downpour; damage extended from the roof to Fuller Hall.

Key volunteers in our landscaping and grounds maintenance work are Kathy Ludlow and Marti Yoder, who themselves coordinate a host of additional volunteers in keeping our grounds looking beautiful.

Our front office continues to be managed by Jinine Ramirez Cortez, who is our Front Office Administrative Associate and Administrative Assistant to Senior Minister Bill Sinkford. Jinine manages the day-to-day administrative details, coordinates church committees and church sponsored events, supports Board of Trustees, supervises our front desk volunteers, and serves as our Senior Minister’s administrative assistant.

Three new front desk volunteers – Karen Anderson, Allen Julian, and Sarah McKenzie – have joined our team. These three are in addition to the five that have been long-time volunteers, Judy Davis, Joanne Doty, Joanne Hagensick, Lil Hosman, and Julie Wheeler. The volunteers have been taking on a variety of substantial administrative tasks to assist staff members. The volunteer support role has significantly helped alleviate staff workload during this difficult and lean economic time. We are grateful to them for the vital support they provide.

Membership
– Craig Towers, Membership Coordinator

Membership Committee
This hard working and vibrant group of congregant volunteers meets during the year to develop and oversee programs and activities which impact hundreds of visitors and newcomers annually. Each committee member belongs to one of the following teams: Outreach (phone), Welcome, Education, Enrollment and Hospitality. Adjunct Committee members include Newcomer Table hosts, Welcome Desk Hosts, Coffee Hosts and Tour Guides. Membership programs involve the volunteer efforts of over 60 congregants, and offer critically important connections with seekers, month after month, throughout the church year.

2011/2012 Membership Committee
Dave Esch, Chair
Steve Nelson, Vice-chair
Kenard Burchette
Sharon Dawson
Jay Jackson
Holly Tse
Rick Reynolds

Martin Sommer
Bob Webb
Karin Webb
Jasmin Whalen-Vu
Mark Woodlief
Evie Zaic

Mission:
To welcome newcomers to First Unitarian Church; to shepherd them through the membership process; to teach them about the church; to help them make their initial connections within the congregation; and to assist them in sustaining their relationship to the church.

Goals:
As a team, the Membership Committee, in conjunction with Membership Volunteer Hosts, and Membership Staff work to:

- Identify and welcome first-time visitors, newcomers and seekers;
- Help newcomers better understand Unitarian/Universalism and First Church, Portland;
- Help newcomers and new members understand that generosity is a fundamental spiritual practice;
- Answer newcomer questions, and/or provide relevant information about the church;
- Encourage all congregants to deepen their connections to the church via the wide variety of adult program opportunities and small group ministries that are offered;
- Appropriately enroll those who are prepared to become members;
- Recognize and celebrate these new members.

To accomplish these goals, Membership provides the following programs staffed by volunteers:

- **Host Hospitality Training** — Membership Committee offers “hospitality training” to all information table host volunteers, ushers and greeters. This informative evening emphasizes the important role that each “front line” volunteer plays on Sunday morning, particularly in establishing a positive “first impression” for visitors and newcomers.

- **Newcomer Table** — staffed with friendly and informed volunteer hosts. At the table, visitors may complete our guest questionnaire, subscribe to *Front Steps* or e-news, receive a nametag, and pick up informative literature, etc. Table operates every Sunday throughout the year during each social hour. Photos of recent new members are displayed on the nearby bulletin board.

- **Narthex Welcome Desk** — before and after each Sunday service, year-round. Desk volunteers help visitors by answering immediate questions, distributing literature, inviting them to coffee hour, encouraging them to complete our guest questionnaire, making a visitor nametag, etc.

- **Eliot Chapel Welcome Desk** — before and after the Eliot Chapel Sunday service, year-round. Desk volunteers help visitors by answering immediate questions, distributing literature, inviting them to coffee hour, etc.

- **Coffee Hosts** — after each service. These friendly individuals are ready to greet first-time visitors in the Narthex, and ease their transition into the coffee hour scene in Fuller Hall or in the Buchan Reception area.
Membership staff and volunteers also facilitate the following educational classes:

- **Introduction to Unitarian Universalism for Newcomers** — Facilitated by one of our ministerial staff, Intro to UU offers newcomers an opportunity to gain a basic understanding of our faith and history, ask questions, and take a tour of the church campus. The class is offered every other month throughout the program year.

- **Path to Membership** — A class designed for potential new members. The curriculum features a segment facilitated by one of our ministerial team regarding spirituality, covenant and how they relate to church membership. Representatives from the Board of Trustees and other lay leaders share information about generosity, pledging and church finances, as well as how committed members are the foundation of this church. All potential members are encouraged to take this class prior to “signing the Membership Book” on Enrollment Sunday. The class has been very well attended, and a majority of class attendees have elected to join the church at the conclusion of the class.

- **UU Core Curriculum** — expands and deepens the newcomer’s initial educational experience. Varieties of classes are offered throughout the program year, and are coordinated through the Adult Programs department.

Other events/activities coordinated by Membership staff and volunteers include:

- **Enrollment Ceremony** — the first Sunday, each month. Active participants may become full voting members by signing the Membership Book and making an annual financial pledge that is “generous within her or his means”, as established in the church by-laws.

- **New Member Recognition Sundays/Reception** — A ceremony of welcome held during worship service, normally in October and April, followed by a reception. This year, the service was held only once, on Sunday, April 10, and 89 new members were eligible to participate.

- **New Member Holiday Potluck** — This was the third year for this successful event, designed primarily for newer members to meet other newer members and to socialize. Our guest speaker was intern minister Cathy Rion, who spoke about her call to UU ministry, and also played the cello for us!

- **Church Campus Tours** — Walking orientations for newcomers hosted by volunteer docents, offered Sundays from late spring through early fall, and during each Intro to UU class.

- **New Member Follow Up** — Four months after enrollment, each new member is contacted to determine her or his success in deepening connections through church programs. Guidance is offered to those who need or seek it.

- **Exit Interview** — The committee has developed a phone questionnaire that it uses from time to time to interview congregants who are no longer active in First Church (based on “inactive” information pulled from the data base), in an effort to learn more about why individuals leave our community.

Membership has welcomed 106 new members since May 2011, compared with 89 new members in the previous year.
## MEMBERSHIP ENROLLMENT—First Unitarian Church, Portland

May, 2011—April, 2012

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<tr>
<th>Linda Arata</th>
<th>Barbara Hansen</th>
<th>Dorthea Petersen</th>
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<tr>
<td>Jennifer Arnold</td>
<td>Jack Hansen</td>
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<td>Rebecca Galloway</td>
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<td>Dan Zimmerman</td>
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Music and Arts Program
—Mark Slegers, Minister of Music

Mission:
In fellowship, the Music and Arts Program nurtures artistic excellence and spiritual growth, rooted within UU values, for all who wish to blossom through artistic expression. May all hands, all voices, all ages flourish.

Notes from Mark Slegers
The added 11:15 a.m. Eliot Chapel Service has been an exciting addition to our church and the work of your music department. Each Monday the Music Staff meets for 90 minutes to organize the week of musical preparation. I am proud of each staff person for their dedication and can-do attitude. We are enjoying this process.

There is a different kind of music presented in the Chapel Service. We have found that choirs and ensembles to be most effective there, but styles include Jazz and show tunes as well. John Boelling, Assistant Director of Music, oversees Chapel music and has done an excellent job of planning, recruiting groups and rehearsing them. He has been both effective in working with individuals and ensembles and imaginative in his musical programming.

I am proud and humbled to work with the fine singing musicians in the Chalice, Unitarian, and Chamber Choirs. I enjoy our work together, our spiritual and community building times and especially as we present our music as spiritual food on Sunday mornings for all of you.

I have asked the music staff to present goals and outcomes of their work this year. Now you can hear directly from them:

Keyboard Music — Joe O’Donnell
Goals:
- Supported the music staff's provision of music for three Sunday services through the creation and maintenance of a shared online planning document.
- Expanded my organ music repertoire to integrate the Wicks organ in the chapel into worship programming.

Keyboard Music — Signe Lusk
Goals:
- Meeting the new challenge of the third service and all the scheduling issues i.e. who’s on first, who’s on second.
• I made sure that I was in clear communication with Joe and the Directors as to what the “dance” looked like. We also tried to make it as uncomplicated as possible for the keyboardists this year.
• The added element of monthly topics presents a new challenge, requiring additional research and selection time.

Children’s Music — Mona Warner

Goals:
• **K-2nd graders**: To give children the opportunity to learn to sing in a group while having fun and contributing to the spirit of our community.
• **Sophia Singers**: Each Sunday children come together to learn songs, practice matching pitch and rhythms. They sing at the Christmas program, in the spring program and at various 11:15 Chapel services.
• **3-5/6 graders**: To provide the experience of singing together in unison and two- or three-part harmonies while learning good singing habits. Each Monday children (3rd-6th graders) learn songs that include harmonies, reading music, and vocal techniques. They sing at Christmas, in Spring, and the 11:15 Chapel service.

UU Women’s Choir — John Boelling

Goals:
• Foster a friendly and supportive music-making environment for all who attend weekly rehearsals. This includes helping those with less experience learn good singing and choral skills while keeping those with more experience engaged and challenged.
• After-choir snack time to help build community and a Saturday morning retreat each term with an emphasis on fun, skill-building, and fellowship.
• Provide solo opportunities for both experienced and less-experienced singers.
• Support and enhance 3rd-service worship and sermon theme with diverse repertoire while striving for musical excellence: such as music of Bob Dylan and Carol King, musical theater, gospel songs by Ysaye Barnwell, folk music from India, Brazil, and France, classics by Mendelssohn and Bach.

Handbell Program — Ellie Hodder

Goals:
• To build a community that fosters connections between ringers of all ages
• To learn musical skills in a supportive fun atmosphere
• To grow in confidence, foster teamwork and poise by working and performing together
• To achieve as a team to bring music to life for our faith community in ways that touch and inspire

Achievement of these goals includes:
• An increase numbers of youth and adult ringers; outreach to church members and friends, young and old
• Participation by all ensembles in worship services in both the Sanctuary and Chapel
Hosting of Pacific NW Youth Handbell Festival with youth other faith communities

Religious Education for Children
– Cathy Cartwright, Director

Registration and Other Numbers:
- 495 – 390 infants/children and 105 youth registered to date (April 2012).
- 72 staff/volunteers support CRE/YRE – 10 paid staff and 2 volunteer in Childcare;
- 46 CRE teachers and 12 YRE teachers/advisors; 4 weekday volunteers
- Registration held steady from last year, with a slight decrease in youth registration.

Programs
Programs for Children are curricula driven and, though we take into consideration the monthly congregational themes, it is not always possible to incorporate them into developed sessions. Instead, we bring themes into the “sharing circles” that are a part of the tradition in each class, or into Children’s Chapel. The curricula come from a number of resources; some from the Unitarian Universalist Association (UUA), others have been developed by professional religious educators.

This year we offered Our Whole Lives (OWL) for 11- and 12-year-olds. If numbers are the quantifier, then this was a huge success. 28 children were involved, which required 2 separate classes. Offered between the services, it allowed children to attend their regular class and participate in OWL as well. One of the goals of the program is to promote child/parent communication. While the children were meeting, parents gathered to hear more specifics about the session, to raise any questions, and to share concerns. Evaluations following the program reflected appreciation from both the children and the parents.

Multi-Cultural Appreciation
This year’s program for 6th graders, Keepers of the Earth, uses stories from specific Native American traditions to bring a focus to environmental issues. Coincidentally, there were two teachers in the class who are part Native American and very proud of their family roots. We had guest speakers and much more to ground the class in direct experience.

Social Justice
- This year our families were noticeably involved with Social Justice programs through the Family Shelter. Our 6th graders made lunch (using locally grown products) and the younger classes made Christmas cards.
- During the end-of-year picnic, all our families brought in items for “hospitality bags”. They then handed these out to folks who do not have a home. It was appreciated that we have projects that was “hands-on” instead of being in the abstract.
I seem to report each year that our Mitten Tree is a very successful program. It grows and grows, allowing us to distribute items to more organizations each year. It is my goal to have as many families as possible involved, from setting up the trees, to decorating, to sorting items, to delivery. I even have families remove the trees to be recycled instead of relying on sexton staff. This year 12 families helped with our Mitten Trees.

These are just a few examples.

Community Building
- I continue to add small group social events every year. Our New Family Potlucks were appreciated and a great way for new folks to get to know each other. I had one family who has been attending for a long time tells me the socials are very important to them. “It’s one of the ways we can slow down and really connect with other families.” We also had a Teacher Potluck as a social event (not training). It is through small group experiences that we strengthen our connection.
- The Learning Community retreat (April at Menucha Conference Center) has become a highlight. Folks are attracted to teach in large part because they are seeking small-group community. This retreat is a celebration of that and is an extraordinary example of multi-generational work. Youth (16- to 18-years) are included. We play together, eat together, worship together and plan together.

Professional
This year I have served as interim president of the district chapter the Liberal Religious Educators Association. The president needed step back due to illness, so I was responsible for organizing Renaissance Module training on administration. 16 religious educators and volunteers attended the training in Seattle WA, which I also co-lead. I was also invited to do an “assessment” of a religious education committee and program on the east coast. This was the first time I was invited to do a consultation and I thoroughly enjoyed it.

The Religious Education Committee
Mission:
The First Unitarian Church Religious Education Committee assists DREs, provides teacher support, develops procedures, plans events, and acts as Sunday ambassadors. We serve our Learning Community and value education, character development, spiritual growth, community and social justice. The committee meets monthly.

Patricia Collins, chair        Maggie Quintana
Catherine Carroll             Pat Storey
Linda Dolejs                  Chris Tanner (recently resigned)
Bill Cunninghame              Lee Spiker
Bill Karon-Flores

This year the RE Committee raised fund through the sale of small chalices to sponsor a student through the Partner Church program. We raised over $460, enabling us to support a student for 4
years. We are expecting to receive information about the specific student so we can communicate on a regular basis.

This committee has been reading chapters from *Uprooting Racism* by Paul Kivel. We also follow up each meeting with a review, asking ourselves how the meeting was conducted and if we considered anti-racism/anti-oppression in all we do.

**Religious Education for Youth**  
—Dana Regan, *Director*

**Registration** (see Religious Education for Children, above)  
Registration for Youth Programs decreased from 117 last year to 105 this year. Attendance was at 58% in the 11:15 service classes. There are no youth program classes at the 9:15 service.

**Programs**  
The goal of First Unitarian Church’s youth program is to involve all youth in the total life of the church. The balanced program includes the major components of a strong youth program: learning, worship, and social action, ministry within the congregation, leadership and fellowship. All youth classes were well attended.

- **7th Grade** – focused on the Abrahamic Religions: Judaism, Christianity and Islam.
- **8th/9th Grade** – focused on the spiritual exploration in Coming of Age.
- **Young Religious Unitarian Universalists (YRUU)** – the program in these grades is not based on curriculum but rather on the interests of the youth. Programs have included many discussions about religion, current events, speakers from within the church as well as outside and planning the Annual Youth Service.
- **Campus Ministry** – The campus ministry program is up and running at Reed College and Portland State University. Students from both colleges will host a luncheon for our graduating seniors in April talking to them about continuing their involvement with Unitarian Universalism during their college years. Our own young adult group will join the campus young adults for this luncheon.

**Multi-cultural appreciation**  
All youth programs areas have a multi-cultural approach to them from Day of the Dead to LGBTQQQ awareness to learning about various diverse subjects in YRUU. Campus students are quite involved with Interfaith movements.

**Social Justice**  
All youth have participated in social justice or social action this year. 7th graders volunteered with Friends of Trees this year. 8th/9th graders have worked at completing various community service projects including creating welcome baskets for 13 Salmon families and helping with Rabbi Michel Lerner’s visit.

YRUU prepared and delivered a complete Thanksgiving meal to 7 new immigrant families this past fall. In April they invited a School Board member to speak about one of their concerns: Saving Outdoor School.

**Community Building and Fellowship**
As is our custom, all classes participated in Creative Combustion for the month of September to learn how to get along and work together. Sociologists are becoming more and more aware that we must actually teach our students how to be civil and experience what trust feels like. We must value each other’s worth and dignity in a meaningful way.

There were many opportunities for play and fellowship this past year with overnights and pizza making and white elephant gift giving.

**Social Justice Programs**
—Rev. Kate Lore, Social Justice Minister

This year has been an important one in the life of our Social Justice Program, as I have taken much more of a teacher/trainer role with the social justice leaders. We started our year in retreat at Menucha in which I presented our leaders with a special program on Post-Modern Organizing and Process Theology. Drawing heavily upon Otto Scharmer’s Book, “Theory U: Leading from the Future as it Emerges,” we discussed how this historically significant time in our society requires: 1) a new depth of relationship with each other; 2) a greater use of technology and social media; and 3) an even greater comfort with creative chaos. Our monthly Social Justice Council meetings have changed format to continue this teaching. The Council members have, in turn, asked for continued teaching along with increased leadership development opportunities.

This year has been the fullest one I have experienced in my 14 years at First Unitarian Church. The following is a very quick overview of some of the bigger accomplishments:

1. **Occupy Portland:** We welcomed and supported Occupy Portland activities when the Occupy Wall Street movement emerged on October 6, 2011. Since then we have helped this thriving group of activists—which include many church members and leaders—in many ways:
   - Temporarily housing the Occupy Portland media center;
   - Provided information and referral for homeless Occupiers;
   - Organized a Pink Martini Concert that drew over 4,000 to widen the circle of support and understanding of the Occupy Wall Street Movement. It included speeches by Congressmen Peter DeFazio and Earl Blumenhaur, and religious leaders from the Christian, Jewish, Muslim and Unitarian Universalist traditions. Bill Sinkford represented us very well!
   - Securing a new office, meeting spaces and renter’s insurance over at St. Francis of Assisi Catholic Church;
   - Hosting a wide variety of community forums on topics of interest to our church (e.g., The Race & Class Dynamics of the Occupy Wall Street Movement)
   - Hosted Thanksgiving Meal with World Cafe conversations;
   - Provided a safe place for a few group therapy sessions for the people who suffered trauma;
   - Offer training sessions non-violent civil disobedience; and
   - Established a strict behavior and language covenant for any activity that takes place at our church. This covenant has, in turn, been adopted by most off-site Occupy events as well;
2. **13 Salmon Family Center:** We prepared our facility and met Fire Marshall requirements in order to open 24-hours a day overflow shelter for homeless families during the Winter Months. We also held a Theology Class on why and how we are called to help others.

3. **Gifts for Change:** We broke away from Alternative Gift Markets, International at a time when they were beginning to fail and formed our own program.

4. **Emergency Assistance for Members:** Member Needs skyrocketed this year so we continued the Thursday support group and make good use of our Emergency Fund for Members.

5. **Police Accountability:** The Federal Dept. of Justice is currently doing an audit on the Portland Police Bureau because they identified a pattern of civil rights abuses towards mentally ill persons and people of color. We maintain our close relationship with the Albina Ministerial Alliance Coalition on Justice & Police Accountability and helped organize 3 public “Speak Out” events to provide a means for the Dept of Justice employees to hear public testimony.

6. **Beloved Conversations:** We ran four classes Beloved Conversations throughout the 2011 year. In addition, we organized several cultural events, including:
   - Three plays by black playwrights and one Blues Festival) for church members.
   - One “Love Has No Borders” Dinner with migrant families;
   - One trip to the Portland Waterfront Blues Festival
   - Hosting the Freedom Riders Exhibit from Roosevelt High.
   - One Migrant Worker Tour.

7. **Community Lectures:** We hosted a wide array of community lectures and events that provided information, inspiration and mobilization around economic and environmental justice.

**Sermons 2011-2012**

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<tr>
<th>Date</th>
<th>Title</th>
<th>Speaker</th>
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<tr>
<td>1-May</td>
<td>Let It Begin with Me</td>
<td>Rev. William Sinkford</td>
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<td>8-May</td>
<td>Family Values</td>
<td>Rev. William Sinkford</td>
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<td>15-May</td>
<td>Crossing Borders</td>
<td>Rev. William Sinkford</td>
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<td>29-May</td>
<td>Perfect Equilibrium</td>
<td>Rev. Galen Guengerich</td>
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<td>5-June</td>
<td>Embodied Brilliance</td>
<td>Cathy Rion, Intern Minister</td>
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<td>12-Jun</td>
<td>Becoming Part of History</td>
<td>Rev. Bill Sinkford</td>
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<td>26-Jun</td>
<td>Finding an Invincible Summer...Within</td>
<td>Rev. Marcia Schekel</td>
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<td>3-Jul</td>
<td>Rebel Buddha’s Road to Freedom</td>
<td>Rev. Kate Lore</td>
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<td>10-Jul</td>
<td>Lines in the Sand</td>
<td>Cathy Rion, Intern Minister</td>
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<td>On the Pilgrim’s Path</td>
<td>Rev. Tom Disrud</td>
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<td>24-Jul</td>
<td>Ministry on the Margins</td>
<td>Rev. Joseph Santos-Lyons</td>
</tr>
<tr>
<td>31-Jul</td>
<td>In Nature We Are Nourished</td>
<td>Cathy Rion, Intern Minister</td>
</tr>
<tr>
<td>Date</td>
<td>Title</td>
<td>Speaker</td>
</tr>
<tr>
<td>------------</td>
<td>--------------------------------------------------------------</td>
<td>------------------------------------------</td>
</tr>
<tr>
<td>7-Aug 2011</td>
<td>Islam and the Holy Days of Ramadan</td>
<td>Rev. Kate Lore</td>
</tr>
<tr>
<td>21-Aug 2011</td>
<td>Who Lays Claim to Your Heart</td>
<td>Cathy Rion, Intern Minister</td>
</tr>
<tr>
<td>4-Sep 2011</td>
<td>Rebuilding the American Dream</td>
<td>Rev. Kate Lore</td>
</tr>
<tr>
<td>11-Sep 2011</td>
<td>Paradise Found</td>
<td>Rev. William Sinkford</td>
</tr>
<tr>
<td>18-Sep 2011</td>
<td>A Work in Progress</td>
<td>Rev. William Sinkford</td>
</tr>
<tr>
<td>25-Sep 2011</td>
<td>little birds who are the secrets of living</td>
<td>Rev. Tom Disrud</td>
</tr>
<tr>
<td>2-Oct 2011</td>
<td>The Tight Places</td>
<td>Rev. William Sinkford</td>
</tr>
<tr>
<td>9-Oct 2011</td>
<td>The Dance</td>
<td>Amy Beltaine, Intern Minister</td>
</tr>
<tr>
<td>16-Oct 2011</td>
<td>A Larger Love</td>
<td>Rev. Victoria Safford</td>
</tr>
<tr>
<td>23-Oct 2011</td>
<td>Freedom and Other Vices</td>
<td>Rev. William Sinkford</td>
</tr>
<tr>
<td>30-Oct 2011</td>
<td>But Not Forgotten</td>
<td>Rev. William Sinkford</td>
</tr>
<tr>
<td>13-Nov 2011</td>
<td>The Devil Made Me Do It</td>
<td>Rev. William Sinkford</td>
</tr>
<tr>
<td>20-Nov 2011</td>
<td>We are Saying Thank You</td>
<td>Rev. Tom Disrud</td>
</tr>
<tr>
<td>27-Nov 2011</td>
<td>Be Not Afraid</td>
<td>Rev. Kate Lore</td>
</tr>
<tr>
<td>4-Dec 2011</td>
<td>Will You Pray With Me?</td>
<td>Rev. William Sinkford</td>
</tr>
<tr>
<td>18-Dec 2011</td>
<td>Praying With Our Feet</td>
<td>Rev. William Sinkford</td>
</tr>
<tr>
<td>25-Dec 2011</td>
<td>Each New Day Your Heart May Pray</td>
<td>Amy Beltaine, Intern Minister</td>
</tr>
<tr>
<td>1-Jan 2012</td>
<td>New Wine in Old Skins</td>
<td>Rev. William Sinkford</td>
</tr>
<tr>
<td>8-Jan 2012</td>
<td>In the Beginning</td>
<td>Rev. William Sinkford</td>
</tr>
<tr>
<td>15-Jan 2012</td>
<td>A Faith To Change the World</td>
<td>Bruce Knots</td>
</tr>
<tr>
<td>22-Jan 2012</td>
<td>Awakening the Soul</td>
<td>Rev. Kate Lore</td>
</tr>
<tr>
<td>29-Jan 2012</td>
<td>Outside the Box</td>
<td>Rev. William Sinkford</td>
</tr>
<tr>
<td>5-Feb 2012</td>
<td>The Call of Love</td>
<td>Rev. William Sinkford</td>
</tr>
<tr>
<td>12-Feb 2012</td>
<td>And the Greatest of These is Love</td>
<td>Rev. Kate Lore</td>
</tr>
<tr>
<td>19-Feb 2012</td>
<td>Love Lifts Us Up</td>
<td>Rev. William Sinkford</td>
</tr>
<tr>
<td>26-Feb 2012</td>
<td>Love Letter to Occupy Portland</td>
<td>Rev. Rosemary Bray McNatt, Guest Minister</td>
</tr>
<tr>
<td>3-Mar 2012</td>
<td>Bring Many Names</td>
<td>Amy Beltaine, Intern Minister</td>
</tr>
<tr>
<td>11-Mar 2012</td>
<td>YRUU Annual Service, Homilies</td>
<td>YRUU</td>
</tr>
<tr>
<td>18-Mar 2012</td>
<td>On Earth As It Is In Heaven</td>
<td>Rev. William Sinkford</td>
</tr>
<tr>
<td>25-Mar 2012</td>
<td>The 8th Deadly Sin</td>
<td>Rev. William Schulz, Guest Minister</td>
</tr>
<tr>
<td>1-Apr 2012</td>
<td>Jubilee</td>
<td>Rev. William Sinkford</td>
</tr>
<tr>
<td>8-Apr 2012</td>
<td>Finding Hope In A Good Friday World</td>
<td>Rev. William Sinkford</td>
</tr>
</tbody>
</table>
Child Dedications – May 2011-April 2012
Alison Nicole Archer
Madeleine Poppy Eraut
Evie Moon Faciana-Smith
Maisie Blue Faciana-Smith
Nelli Sky Faciana-Smith
Evelyn Louise Hulleman
Piper Rose Kittersong
Emma Jean Leitner
Kai Richard Charles Morris
Rhionne Catherine Thacker Morris
Tierney Miriam Aileen Morris
Zuri Rose Perin
Nina Yulan Syna
Frankie Azul Taylor
Autumn Elena Trujillo
Chloe Yvonne Trujillo
Colton Wai-Ching Tse
Cormac Robert Ky Vu
Hazel Christine Webber

Passages – 2011-2012
Virginia Beatty
Marian Lenore Farina Bolstad
Florence Rawson Cohen
Frances Diack
Janis Elliot
Lee Fawcett
Barbara Glancy
Vincent Rose Michael Hamilton-Ivanov
Evadne Ammen Hilands
Joan Hollingsworth
Bonnie Hubbard
Barry McCauley
Autry Powell
Jean Scott
Deborah Lantz Steiner
David Stewart
Claire Elaine Zahm


2011-2012 Church Statistics

Members certified to the Unitarian Universalist Association: 1,022
Pledging Households: 995
RE Enrollment: 495
Average weekly Attendance/Adults (excl. summer months): 888

MINISTERS
Rev. Bill Sinkford, Senior Minister
Rev. Thomas Disrud, Associate Minister
Rev. Kate Lore, Social Justice Minister
Mark Slegers, Minister of Music
Amy Beltaine, Intern Minister
Rev. Alan G. Deale, Minister Emeritus
Rev. Dr. Marilyn Sewell, Minister Emerita

CHURCH OFFICE AND PROGRAM STAFF
John Boelling, Assistant Music Director
Nicole Bowmer, Associate Director, Religious Education for Children & Youth
Cathy Cartwright, Credentialed Director of Religious Education for Children
Jason Chapman, Facilities Manager (recently transitioned from Lead Sexton)
Zaida Cooper, Controller
Kathryn Estey, Church Administrator
Gardner Grice, Facilities Manager (recently resigned)
Helena Hessle, Adult Programs Assistant
Ellie Hodder, Director of Handbell Choirs
Amanda Keppeler, Raiser’s Edge Clerk
Dawn Korthals, Accounting Clerk
Signe Lusk, Pianist
Mary McFarland, Development Officer
Holli Nicknair, Rentals/Community Bridges Manager
Joseph O’Donnell, Organist
Katie Radditz, Director of Adult Programs
Jinine Ramirez Cortez, Front Office Administrative Associate
Dana Regan, Credentialed Director of Religious Education for Youth
Craig Towers, Membership Coordinator & Publications Editor
Mona Warner, Children’s Music Director
Jenifer Wills, Assistant Facilities Coordinator


### FY 2013 Proposed Budget Details

#### Income Assumptions:
- FY 2013 pledge income is budgeted at only a modest increase over FY 2012 ACTUAL results; this is a lower number than what was BUDGETED for FY 2012.
- Non-pledge contributions budgeted to reflect FY 2012 actual results.
- Fund 49 accounts are consolidated, bringing "old" funds into budget as operating income where appropriate.
- Increased adult program fees by 10%; reduced adult programs paid facilitators
- Increased choir participation fees by 50%
- Added a 5th Music & Worship service

#### Other assumptions & items reflected in this budget:
- Calculated shrinkage on pledge payments at 4.5% to reflect current experience.
- Incorporated interest on Line of Credit, which will continue to be used as our cash-on-hand cycles normally throughout the year.
- Incorporation estimated interest on Buchan Building refinancing (full year)
- Denominational dues reduced; calculated at FY11 level

#### Notes Regarding FY 2013 Proposed Budget
- Payroll assumptions:
  - Salaried (but not hourly) employees to receive across-the-board pay roll-backs.
  - Some staff positions reconfigured to work fewer hours.
  - Half-time office assistant added.
  - Medical, dental & life/disability costs assumed to increase by an estimated 7%.
  - Pension contributions for qualifying employees paid at the 10% level.

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>REVENUE</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Non-pledge Contributions Revenue</td>
<td>178,870</td>
<td>168,816</td>
<td>189,282</td>
<td>194,960</td>
<td>200,809</td>
</tr>
<tr>
<td>Pledge Revenue</td>
<td>1,434,344</td>
<td>1,418,190</td>
<td>1,474,220</td>
<td>1,516,526</td>
<td>1,560,102</td>
</tr>
<tr>
<td>Pledges + Contributions</td>
<td>1,613,214</td>
<td>1,587,006</td>
<td>1,663,502</td>
<td>1,711,487</td>
<td>1,760,911</td>
</tr>
<tr>
<td>Transfer in from Safety Reserve</td>
<td>83,000</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td><strong>PROGRAM</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Program Revenue</td>
<td>235,379</td>
<td>264,995</td>
<td>269,349</td>
<td>277,430</td>
<td>285,753</td>
</tr>
<tr>
<td><strong>RENT</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Rent Revenue</td>
<td>216,699</td>
<td>228,361</td>
<td>188,765</td>
<td>198,765</td>
<td>213,765</td>
</tr>
<tr>
<td><strong>TOTAL REVENUE</strong></td>
<td><strong>2,148,292</strong></td>
<td><strong>2,080,362</strong></td>
<td><strong>2,121,616</strong></td>
<td><strong>2,187,681</strong></td>
<td><strong>2,260,429</strong></td>
</tr>
<tr>
<td><strong>COSTS</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Personnel</td>
<td>1,407,664</td>
<td>1,318,808</td>
<td>1,345,184</td>
<td>1,395,992</td>
<td>1,453,091</td>
</tr>
<tr>
<td>Occupancy</td>
<td>245,999</td>
<td>276,717</td>
<td>285,019</td>
<td>293,569</td>
<td>302,376</td>
</tr>
<tr>
<td>Programs</td>
<td>394,088</td>
<td>(65,291)</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td><strong>TOTAL Cost of Programs</strong></td>
<td><strong>448,649</strong></td>
<td><strong>328,797</strong></td>
<td><strong>335,373</strong></td>
<td><strong>342,080</strong></td>
<td><strong>348,922</strong></td>
</tr>
<tr>
<td>Depreciation Expense</td>
<td>1,500</td>
<td>58,540</td>
<td>58,540</td>
<td>58,540</td>
<td>58,540</td>
</tr>
<tr>
<td>Sabbatical Reserve</td>
<td>3,000</td>
<td>7,500</td>
<td>7,500</td>
<td>7,500</td>
<td>7,500</td>
</tr>
<tr>
<td>Major Repairs Reserve</td>
<td>12,000</td>
<td>90,000</td>
<td>90,000</td>
<td>90,000</td>
<td>90,000</td>
</tr>
<tr>
<td>Equipment Reserve</td>
<td>5,000</td>
<td>97,500</td>
<td>97,500</td>
<td>97,500</td>
<td>97,500</td>
</tr>
<tr>
<td>Contingency Reserve</td>
<td>37,040</td>
<td>58,540</td>
<td>58,540</td>
<td>58,540</td>
<td>58,540</td>
</tr>
<tr>
<td>Reserves &amp; Depreciation</td>
<td>45,980</td>
<td>(58,540)</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td><strong>TOTAL NET EXCESS REVENUE (COSTS)</strong></td>
<td><strong>(0)</strong></td>
<td><strong>(0)</strong></td>
<td><strong>(0)</strong></td>
<td><strong>(0)</strong></td>
<td><strong>(0)</strong></td>
</tr>
</tbody>
</table>

~ Assumptions Beyond FY 2013 ~
- Children’s/Youth RE fees for pledging families eliminated in FY 2014.
- Denominational dues brought up to full Fair Share in FY 2016.
# First Unitarian Church
## Funds Budget
### July 1, 2012 - June 30, 2013

<table>
<thead>
<tr>
<th>Total Budget</th>
<th>General Capital (Main)</th>
<th>Eliot Chapel</th>
<th>Commemoration</th>
<th>Chesney Intern</th>
<th>Hessler Deale</th>
<th>Steiner Fund</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Estimated Beginning Balance July 1, 2012</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>$387,003</td>
<td>$311,835</td>
<td>-</td>
<td>-</td>
<td>$11,597</td>
<td>$35,764</td>
<td>$27,807</td>
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</tbody>
</table>

**Receipts**

<table>
<thead>
<tr>
<th></th>
<th>Buchan Bldg.</th>
<th>Eliot Chapel</th>
<th>Commemoration</th>
<th>Chesney Intern</th>
<th>Hessler Deale</th>
<th>Steiner Fund</th>
</tr>
</thead>
<tbody>
<tr>
<td>Interest/Appreciation</td>
<td>$1,348</td>
<td>$40</td>
<td>-</td>
<td>-</td>
<td>$284</td>
<td>$1,024</td>
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<tr>
<td>Contributions</td>
<td>$94,000</td>
<td>$84,000</td>
<td>$10,000</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Transfer from Operating Capital Reserve</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total Receipts</strong></td>
<td>$95,348</td>
<td>$84,040</td>
<td>-</td>
<td>-</td>
<td>$10,000</td>
<td>$284</td>
</tr>
</tbody>
</table>

**Disbursements**

<table>
<thead>
<tr>
<th></th>
<th>Buchan Bldg.</th>
<th>Eliot Chapel</th>
<th>Commemoration</th>
<th>Chesney Intern</th>
<th>Hessler Deale</th>
<th>Steiner Fund</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facilities Upgrade</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Loan Payments</td>
<td>$237,000</td>
<td>$237,000</td>
<td></td>
<td></td>
<td>$10,000</td>
<td></td>
</tr>
<tr>
<td>Transfer to Operation</td>
<td>$10,000</td>
<td>-</td>
<td>-</td>
<td></td>
<td>$3,000</td>
<td>$3,000</td>
</tr>
<tr>
<td>Intern Subsidy</td>
<td>$6,000</td>
<td>-</td>
<td>-</td>
<td>$3,000</td>
<td>$3,000</td>
<td>-</td>
</tr>
<tr>
<td>Ordinations</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td></td>
<td>$1,000</td>
<td>$1,000</td>
</tr>
<tr>
<td>Grants and Stipends</td>
<td>$1,000</td>
<td>-</td>
<td>-</td>
<td></td>
<td>-</td>
<td>-</td>
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<tr>
<td><strong>Total Disbursements</strong></td>
<td>$254,000</td>
<td>$237,000</td>
<td>-</td>
<td>-</td>
<td>$10,000</td>
<td>$3,000</td>
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</table>

**Surplus (Deficit)**

<table>
<thead>
<tr>
<th></th>
<th>Buchan Bldg.</th>
<th>Eliot Chapel</th>
<th>Commemoration</th>
<th>Chesney Intern</th>
<th>Hessler Deale</th>
<th>Steiner Fund</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>(158,652)</strong></td>
<td><strong>(152,960)</strong></td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>$(2,716)$</td>
<td>$(2,976)$</td>
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</table>

**Estimated Ending Balances June 30, 2013**

<table>
<thead>
<tr>
<th></th>
<th>Buchan Bldg.</th>
<th>Eliot Chapel</th>
<th>Commemoration</th>
<th>Chesney Intern</th>
<th>Hessler Deale</th>
<th>Steiner Fund</th>
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</thead>
<tbody>
<tr>
<td>$228,351</td>
<td>$158,875</td>
<td>-</td>
<td>-</td>
<td>$11,597</td>
<td>$33,048</td>
<td>$24,831</td>
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</tbody>
</table>
FACT SHEET - First Unitarian Church of Portland – Results as of 3rd Quarter FY 2012

Average Sunday Attendance

Annual Fund Pledging

Children and Youth RE Registration

Operating Revenue History 2007-2011

2011-2012 Operating Income through 3/31/12

Op. Income vs. Prior Year and Budget through 3/31/12

Operating Expense History 2007-2011

2011-2012 Operating Expenses through 3/31/12

Op. Expense vs. Prior Year and Budget through 3/31/12
Ensuring the Future of Our Liberal Faith
First Unitarian Church of Portland Foundation
—Martha Richards, President

The Foundation remains in good health.

In the past year, we have selected a new investment manager. Trillium Asset Management had the best record of socially responsible investing among all the choices reviewed by the Board of Stewards. They are active investors – often moving beyond buying and selling to encourage companies to adopt socially responsible labor or management practices. If you would like to learn more about Trillium Asset Management you may want to check out http://trilliuminvest.com/news-views/.

This spring we hope you will join us to honor the founding board stewards at a special reception at the church. These far-sighted individuals understood the importance of growing an endowment for the church, and we remain indebted to them for their care and patience in taking this important step nearly ten years ago. Please help us honor Larry Frager, Beverly Fogle, Sylvia Gates, Barbara Miller as well as Church Trustees on the founding board – Don Watne and Lee Fawcett. We miss the advice of founding Steward Ned Hayes, who passed away two years ago. Arnie Pickar and Joyce Blumklotz joined these initial founding members as part of the ad hoc team which met for five years planning the incorporation of the Foundation. We are particularly grateful to Sylvia and Barbara for their dedication and many years of service initiating and serving the Foundation. Other stewards in the first ten years of the Foundation include Jonathan Ater, Pierre Provost, Paul Pitkin, Cindy Cumfer, Chris Tanner and Camille Wright.

We wish to offer special recognition to Founding Steward, Bev Fogle. In addition to preparing and planning for the Foundation, she then served as President of the Foundation for nearly all ten years of her term. Bev had previously served as a trustee and a former Moderator of the Church during the 1990’s. It will be hard to imagine the Foundation Steward meetings without her. She has brought together her years in business as an estate planner, her love and historical knowledge of the church, and her experienced, articulate leadership to this important job. We are very grateful for her long tenure and sage advice. Thank you, Bev, for all of your hard work!

Beth Hiller has been nominated by the Foundation board to serve as a steward. A member since 1967, Beth worked with the intern committees of the church under both Reverend Alan Deale and Rev. Dr. Marilyn Sewell. She has served on the worship committee, the Salmon Street committee, the finance committee and, most recently, as an officer of the Alliance. Her history with the church and its community will be a welcome addition to our board.

As you recall, Stewards are elected by the congregation (one each year) to serve five year terms. Current stewards include: Linda Aso, Bev Fogle, Martha Richards, Ruth Robinson, and Evans Van Buren. These five are joined by two Stewards appointed by the church Board of Trustees. Our Trustee Stewards this past year have been Pat Malone and Jim Shorr. Pat was instrumental in helping us select our investment manager and has been our treasurer for several years. Jim has been the author of the Foundation’s articles for the e-newsletter, and has added his considerable years of investment expertise to our meetings. We remain grateful to them for their willingness to be active members of the Foundation in addition to their roles as Board Trustees.

As we look to the coming year, we hope you will make the decision to join other Legacy Society members by including the church foundation in your estate plan. The resources you provide the foundation support the long-term financial health of the church. Steady growth in estate giving will enable the church and it members to weather the economic turmoil and meet the needs of the broader community beyond our walls. This is a vision we share with our church leadership and ministers. Please join us in making a planned gift to strengthen the Foundation for the future.