August 12, 2016

From: Executive Team

To: Board of Trustees

Annual Executive Team “Monitoring Report”

We have included an updated version of the June 8, 2016 letter from Bill and Ameena (that accompanied the ballot mailing), as our transmittal memo for this report, to remind us all of the major events that filled our 150th Anniversary Year.

A Year to Remember – Highlights of the 2015-2016 Church Year

The year began with 5,000 Unitarian Universalists arriving to celebrate the beginning of our 150th Anniversary Year. The Portland General Assembly was not, of course, planned as part of our celebration; but it did provide our choirs, our volunteers and our ministers an opportunity to shine. We also kicked off the 6-month exhibit at the Oregon Historical Society in time for UU’s from around the country to see the story of our 150 Years of Activism.

The Anniversary celebrations continued throughout the year with the publication of Toward the Beloved Community, a new history of First Unitarian by our own Cindy Cumfer; an historical worship service using not only our Communion Silver but a Thomas Lamb Eliot sermon; and – coming on May 22 – a Music & Worship Service featuring music from different eras in the church’s life. The year-long celebration concluded with a party on June 12 when we began moving together into our future. The Order of Service that day featured a drawing from a 4-year-old in our Learning Community with a caption that expresses this sentiment: “The past is ours to hold. The future is ours to share.”

January’s Seminary for a Day featured Dr. Susan Ritchie and a focus on the relationship between Unitarian Universalism and Islam, historically and today.

The Sewell Lecture in April brought Tim DeChristopher to First Unitarian for a focus on climate change and the spiritual grounding for activism. The lecture was a real community event, drawing many activist groups and individuals to our sanctuary.

We experimented more deeply with on-line ministry. Virtual attendance on Sunday morning (via live stream) continues to increase, now regularly 8-10% of total attendance. The 8-week Sunday Soul collaboration with Church of the Larger Fellowship helped us learn a great deal about what virtual ministry may come to mean for us. In person attendance at Sunday Soul was modest, but individuals from 25 countries attended one or more of the services.

We received the consultant’s staffing evaluation as the last year ended, putting significant questions on the leadership table as we approach the years ahead.

A number of positive financial results deserve celebration:

- First Unitarian operated in the “black” and within budget for the 5th year in a row.
• Our Annual Fund Drive reached its goal, including sustaining the pledge increases from the Justice Begins at Home campaign. Our average pledge is now more than $1,500 per individual/family.

• After a year of negotiation, the church and our employee union reached agreement on our first union contract. First Unitarian now pays a minimum wage of $15 per hour.

• This year’s Auction raised over $40,000 to purchase and install a much-needed new HVAC system for our Eliot classrooms. The accessibility and welcoming improvements to our building exteriors funded by our previous year’s Auction are currently being completed. The Auction events continue to be a wonderful source of deepening community and friendship.

The Board of Trustees moved forward with the critical task of developing new Five Year Goals for First Unitarian. The Vision Statement adopted at the end of last year is already beginning to shape our discussion and our planning. The Board also took issues of transparency and access to information seriously, continuing the practice of holding Café Conversations to gather input. The Annual Survey gathered responses from 450 congregants this year, an all-time high-- likely thanks to the inclusion of questions relating to the Music Director search.

Our new church history, Toward the Beloved Community, was just named best congregational history by the Unitarian Universalist History and Heritage Society.

And, finally, we celebrated Mark Slegers’ 39 years of service and extraordinary success as Minister of Music as he retired at the end of June. An Acting Director, DeReau Farrar, has been selected to sustain the program next year while an Advisory Search Committee identifies our next permanent Director of Music.

It was a good year, with many positive developments to celebrate and much opportunity calling us forward.

We are grateful for the opportunity to serve.

--
Bill Sinkford
Tom Disrud
Kathryn Estey
**Mission.** 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. To realize this mission, First Unitarian Church:

1) **People who participate in the church community feel safe, experience nurturing relationships and diversity, and are challenged to grow spiritually.**

ET Interpretation: We interpret this element to mean that the church, through its worship life, programs, institutional goals and policies, models radical hospitality to welcome the diversity of people who come through its doors and offer them opportunities to grow spiritually once they are here. It will strive to support people on their life journey through pastoral care and through one-on-one and group interactions. It will strive to build the Beloved Community through a variety of group experiences and will be intentional in its work to be anti-racist and multi-cultural. It will establish policies to insure that the church is a safe place for everyone, and particularly those who are the most vulnerable.

ET Assessment: We believe we are in reasonable compliance with this aspirational Element of our Mission.

Measures/Indicators:

This Element received a rating of 3.98 (5 point scale), comparable to the year before, down slightly from 2014, but well within the margin of error.

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<td></td>
<td>3.98</td>
<td>3.92</td>
<td>4.11</td>
<td>4.18</td>
<td>3.93</td>
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See “Worship” Element for data on attendance.

The number of new members in 2016 was lower than in recent years, but within normal range looking over a 10-year span.

**New Members Annual Enrollment**

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<td>56</td>
<td>84</td>
<td>78</td>
<td>69</td>
<td>67</td>
<td>41</td>
<td>46</td>
<td>70</td>
<td>75</td>
<td>53</td>
<td>78</td>
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Membership Process: For several years we have had two introductory classes, Intro to Unitarian Universalism and Path to Membership, held in alternating months. We observed that people who
signed up for the classes a long time in advance didn’t show up when the class actually came. This coming year we will offer just one class—Path to Engagement—and will hold it about once a month. It will cover much of the same ground the other classes did, but with a little higher level view.

We hope to implement a much clearer path to engagement, focused for new members but available to all. Creating a more accessible and robust approach to welcome visitors and invite them into relationship with First Unitarian is a priority of the Congregational Life initiative and organizational shifts growing out of last spring staff consultation.

Welcome Circles continue to draw visitors following worship. Based on the board’s suggestion, we now hold them directly in front of the pulpit. Finding your way to a side gallery when you are new is a challenge.

Pastoral Support:

Pastoral care is provided to congregants by all First Church ministers and an active team of lay ministers. From January through June, 2016, 20 lay ministers supported 114 congregants for a total of 313 visits, some by phone and email. Note that the number of congregants served is up significantly. Much of that is due to the ride sharing program that has been initiated by lay ministry to help people get to church.

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<tr>
<td># of Congregants Served</td>
<td>114</td>
<td>44</td>
<td>58</td>
<td>38</td>
<td>48</td>
<td>30</td>
<td>48</td>
<td>38</td>
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<tr>
<td># of Meetings/Calls</td>
<td>313</td>
<td>274</td>
<td>289</td>
<td>187</td>
<td>404</td>
<td>337</td>
<td>315</td>
<td>378</td>
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Congregational Diversity:

Demographics from the Congregational Survey reveal an aging congregation: 83% of respondents are 50 or older, 70% over 60. Changes in the age categories used from year to year make exact comparisons difficult, but from 2013 to 2016 the proportion of congregants over 70 grew from 19 to 30%.

The survey results strongly suggest that a focus on age cohort under 50 is called for. For example, we currently offer minimal tailored support for young adults. Our hope is that the Congregational Life Initiative will include new imagination and staff energy for this ministry.
The survey also continues to describe a congregation that is overwhelmingly white, though the percentage of adults who identify as other than white is “drifting” upward, now near 10%. The numerical change is modest but seems real. There are now, consistently, a few more darker faces in the sanctuary on Sunday mornings. We continue to offer programs and trainings on racism, and “Black Lives Matter” continues to be a central element of our internal reflection, public witness and outreach. Our banner has been mentioned with approval by more than one person of color who now regularly attends worship.

“Safety” Policies:

Policies are in place that articulate the vision of First Church as a safe place for a diverse community (Congregational Covenant, Grievance Procedures, Safe Congregation).

2) Participants in lifelong religious education explore diverse points of view and gain a deeper understanding of themselves.

Interpretation: First Church offers opportunities, across the lifespan, for learning and understanding grounded in UU values. We also provide forums for exploring difficult contemporary religious issues.

ET Assessment: We are in compliance with this Element, as written. We continue to believe that this Element should focus more on outcomes than on what we offer.

Measures/Indicators:

In the Congregational Survey, this element received one of the highest ratings (4.18), as it has in the past.

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<tr>
<td>4.18</td>
<td>4.26</td>
<td>4.43</td>
<td>4.54</td>
<td>4.48</td>
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The range of programming offered is reflected in both the Learning Community and Adult Education Program Guides.

Learning Community for Children and Youth

Learning Community Registration ... September-June 2009-2016

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<tr>
<td>Children</td>
<td></td>
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<td>*</td>
<td>390</td>
<td>404</td>
<td>362</td>
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<tr>
<td>Youth</td>
<td></td>
<td></td>
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<td>*</td>
<td>105</td>
<td>120</td>
<td>132</td>
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<tr>
<td>Total</td>
<td>424</td>
<td>465</td>
<td>475</td>
<td>490</td>
<td>495</td>
<td>524</td>
<td>494</td>
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*Beginning in 2012 the Learning Community discontinued the breakout of children and youth, instead measuring total registrations.

Registration in the program for children and youth was down slightly from last year (465 last year vs 424 this year). This would indicate that there has not been a significant effect from changes in fees that were instituted at the beginning of the year. We will be reviewing numbers again in the fall to see what if any impact we see then. Average attendance was 51% of enrollment.

One other note: Last year we had 342 visitors for the year (1 visit= 219, 2 visits= 66, 3 visits= 48, 4 visits= 8). Total Registered from visitors (those not registered last year): 62

Adult Programs Registration Trends:

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<tr>
<td></td>
<td>1,108</td>
<td>1,027</td>
<td>998</td>
<td>1,001</td>
<td>1,315</td>
<td>984</td>
<td>1,157</td>
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In celebration of our 150th year, through 70 classes, 6 retreats, and 9 special events, our focus in Adult Programming has been two fold this year: We looked to our spiritual ancestors and how their teachings broadened the views of First Unitarian to create the liberal church it is today. And the goal of broadening the Beloved Community inspired us to branch out and offer a Shakespeare in Prison Retreat at the Umatilla men’s prison.

3) Original: Provides worship that is inspiring and affirming, as well as a variety of experiences that invite congregants to deepen their spiritual lives.

Revised: Participation in Sunday worship is inspiring and affirming, and deepens the spiritual lives of the participants.

ET Interpretation: First Church offers excellent quality worship that not only nurtures/affirms, but also inspires/challenges congregants to spiritual depth.

ET Assessment: We believe we are in compliance.

Measures/Indicators:

In the Congregational Survey “Provides worship that is inspiring and affirming” received among the highest ratings, (4.28 out of 5.0), comparable to previous year and reduced only slightly from the prior years.

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<tbody>
<tr>
<td>Rating</td>
<td>4.28</td>
<td>4.26</td>
<td>4.39</td>
<td>4.53</td>
<td>4.47</td>
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Sunday worship attendance remains the most important numerical indicator of congregational vitality, although as church-going culture continues to shift it is no longer the sole indicator.

We have reported extensively on the gradual reduction of adult attendance in recent years, especially our last report when a number of possible reasons for the decline were examined.

The gradual reduction in attendance continued last year (-5% overall), despite strong growth in online attendance (+60%). The trend is clear, its meaning less so.

Modest reductions in Sunday worship attendance are being reported by several larger UU churches, though, like First Unitarian, they also report continued strong positive energy.

Our preliminary conclusion is that this reduction reflects, primarily, a changing practice of what “regular” attendance means in our congregants’ lives. This is supported by the RE attendance number at 51% of enrollment. There are, however, several factors that no doubt contribute.

This gradual reduction, coupled with the increased graying of the congregation, demands that we proactively inspect our welcoming practices (See the Welcoming Community Element, #1) and begin testing shifts within and/or additions to our worship offerings as well. This is a complicated topic about which opinions will be both varied and strong. Those who are fed well by our current offerings are well fed.

Attendance will be even more complicated to understand next year as the transition in our music leadership moves forward. Some choir members and some congregants have stayed here because of Mark. Some of those will leave. Others will be drawn to the new energy that DeReau Farrar brings. Some of those will make this their religious home. The balance of leaving and joining as the music program transitions is impossible to predict. This uncertainty will continue to be with us as we welcome a new permanent Director of Music in the 2018 church year.

Sunday Attendance*  

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<tbody>
<tr>
<td>Sanctuary</td>
<td>32,335</td>
<td>-7%</td>
<td>34,728</td>
<td>36,345</td>
<td>37,981</td>
<td>38955</td>
<td>42,129</td>
<td>38,024</td>
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<tr>
<td>Streaming</td>
<td>2,725</td>
<td>60%</td>
<td>1708</td>
<td></td>
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<tr>
<td>Total</td>
<td>35,060</td>
<td>-5%</td>
<td>36,436</td>
<td></td>
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<td></td>
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<tr>
<td>#Sundays</td>
<td>52</td>
<td></td>
<td>52</td>
<td>51</td>
<td>52</td>
<td>52</td>
<td>52</td>
<td>52</td>
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<tr>
<td>Av/Sun</td>
<td>674</td>
<td></td>
<td>701</td>
<td>712</td>
<td>730</td>
<td>749</td>
<td>810</td>
<td>731</td>
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<tr>
<td>Christmas</td>
<td>2,230</td>
<td></td>
<td>2,201</td>
<td>2,035</td>
<td>2,025</td>
<td>1,864</td>
<td>2,163</td>
<td>1,670</td>
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<tr>
<td>Total</td>
<td>37,290</td>
<td>-4%</td>
<td>38,637</td>
<td>38,380</td>
<td>40,006</td>
<td>40,819</td>
<td>44,292</td>
<td>39,694</td>
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*These attendance numbers are for the 12 months of each Fiscal Year (July-June). They differ from the Year-To-Date numbers included in the Finance Committee “Dashboard” which have reflected
our “Program Year (September-June). We are revising the dashboard to include the full 12 month year going forward.

Music Program

Although the ministry of music is not mentioned in the Elements our music program is regularly and appropriately praised. Music is a central part of the worship experience we offer and a central location of ministry at First Unitarian.

Music Program Registration 2011-16

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<tbody>
<tr>
<td>Chamber Choir</td>
<td>49</td>
<td>46</td>
<td>43</td>
<td>40</td>
<td>38</td>
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<tr>
<td>Unitarian Choir</td>
<td>75</td>
<td>85</td>
<td>80</td>
<td>80</td>
<td>80</td>
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<tr>
<td>Chalice Choir</td>
<td>80</td>
<td>82</td>
<td>80</td>
<td>83</td>
<td>75</td>
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<tr>
<td>UU Women’s Choir</td>
<td>22</td>
<td>30</td>
<td>30</td>
<td>29</td>
<td>28</td>
</tr>
<tr>
<td>Bell Choirs</td>
<td>75</td>
<td>72</td>
<td>65</td>
<td>65</td>
<td>60</td>
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<tr>
<td><strong>Totals</strong></td>
<td><strong>301</strong></td>
<td><strong>315</strong></td>
<td><strong>298</strong></td>
<td><strong>297</strong></td>
<td><strong>281</strong></td>
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Mark Slegers successfully retired from his music ministry after 39 years at the church. He was well celebrated and managed the transition with great grace. DeReau Farrar, who will serve as acting music director, is now on the job and getting settled. The Music Transition Committee has posted the job and will begin reviewing applications this fall.

4) Transparent Democratic Process

**Original:** Uses transparent democratic processes to 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.

**Revised:** Employing the principles of policy-based governance and the Unitarian Universalist Association, ensure that all voices are heard and respected.

Revised Interpretation: Responsibilities and authority of ET, Board, Staff and Ministers, within the governance system, are clearly delineated and understood by interested and concerned parties. Efforts to make information available are on-going. Multiple ways to have concerns heard by decision-makers are provided and promoted. ET, ministers and staff all function with robust accountabilities to lay program and support committees in virtually every ministry area.

ET Assessment: The Board is in a period of reconstituting and reestablishing norms, with early positive results. The Board has been proactive in providing information and opportunities for congregant input.
The Board has set a direction towards refining and simplifying our governance structure with much work still to be done. Knowledge about these changes and improvements is not widely known. A relatively small number of congregants care intensely about transparency and congregant involvement in decision-making.

By the standard of the revised language for this Element, we are moving into robust compliance. However, those who desire a rigid transparency and congregant input in all decisions are unlikely to be satisfied.

Measures/Indicators:

The rating for this element was down slightly from the previous year and reduced more than half a full point from 2014. The board is making a concerted effort to be engaged with congregants and to offer chances for input in decision making, particularly around budget issues. We will continue to monitor these numbers, which reflect a work in process.

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<td>3.31</td>
<td>3.42</td>
<td>3.87</td>
<td>3.82</td>
<td>3.58</td>
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5) Ensures the continuity of leadership in the church by developing, supporting, and providing a meaningful experience for a succession of new leaders.

Interpretation: First Church provides a variety of easily accessible pathways for congregants to deepen their spiritual lives through leadership service to the church and supports those who offer leadership in the wider community.

ET Assessment: We believe we are largely in compliance.

The Leadership Development group has continued to meet this year and they are now under the umbrella of the Nominating Committee.

Measures/Indicators:

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<tr>
<td>3.71</td>
<td>3.64</td>
<td>3.92</td>
<td>3.82</td>
<td>3.58</td>
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6) Is a sustainable church community in which congregants, Board, staff and ministers share stewardship of both our tangible and human resources.
E.T. Interpretation: First Church is supported, financially, by congregants at a level that sustains our existing, multi-faceted ministry, and allows the church to build toward a vibrant future. Monitoring of our financial health is shared among Board, ministers, staff, and lay leaders. Annual fund-raising is the responsibility of E.T. and staff with the critical support and collaboration of lay leaders/volunteers.

Measure:

Congregant ratings for this Element of our mission were up slightly from previous year but still down from 2014.

The dip in 2015 was likely due to congregant concerns about financial conditions raised by our support staff’s unionization, with the modest increase in 2016 indicating a gradual return to confidence.

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<tr>
<td>Rating</td>
<td>3.60</td>
<td>3.42</td>
<td>4.05</td>
<td>4.32</td>
<td>4.10</td>
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Annual Fund Drive 2016

Two different messages were sent to congregants regarding our 2016 Annual Fund Drive (AFD):

- To the 361 individuals and families who made pledges earlier in the year to our “Justice Begins at Home” campaign, we asked simply that they maintain their pledge at the new and higher level.

  Of these individuals and families, 153 were able to increase their pledges over their AFD2015+Justice amount, 106 remained steady at their new higher level, and 102 decreased their total pledge.

- Non-Justice pledgers were asked to consider a 10% increase in their 2016 pledge over their 2015 amount.

  Of these individuals and families, there were 108 new or “returning after an absence” pledgers; 211 who increased their pledge; 197 who kept the same pledge; and 90 who decreased their pledge. There were 159 individuals and families who pledged in 2015, but not in 2016, of which 64 had pledged $600 or more in 2015.

We’re very pleased to have reached our budgeted pledge goal of $1.5 million for AFD2016. Even though the total number of pledging units this year was the lowest since 2010, our average pledge increased by $170, resulting in a strong pledge drive. Further analysis of the non-returning pledgers is needed, particularly as it relates to our lowered attendance figures.
In 2012, our data base records do not allow us to accurately distinguish between initial pledges and the 2nd “ask.”

**Key FY 2016 Financial Results**

- We again ended the year “in the black” without needing to dip into our contingency fund to balance the books. The Board and E.T. will confer and decide how to allocate our $46,025 contingency balance and our $40,884 operating surplus at the Board’s September meeting. There are always important initiatives and projects that can’t be scheduled with confidence with funds available through our annual operating budget. A contingency balance and year-end surplus help us make headway on this list of to-do’s.

- No draw-downs from our Major Repairs & Equipment Reserve or the Safety Reserve Fund were needed this year, leaving their respective balances at $159,654 and $140,235.

- We continue to operate within the covenants of the Wells Fargo mortgage, and our positive cash flow prevented the need to use our line of credit for the third year in a row. Our cash flow has become steadier as more congregants make their pledges via some sort of automatic payment. We continue to encourage this in our annual fund drives.

- Another successful Auction was held this spring, netting $41,700. These funds are being used to purchase and install a new HVAC system in our Eliot classrooms, used by our own children and our renters. After more than a year of city permitting and contracting efforts, our projects related to the previous year’s Auction (“Extending Our Welcome”) are finally coming to fruition.

- In the fall of 2015, we instituted a new fee structure for our Religious Education and Music programs. For individuals and families who pledge at a threshold level of at least $600/year, there are no additional fees for participation in either of these programs. For those who do not make a pledge or are pledging less than $600, registration fees will be $450 per person with a $900 per family cap. Scholarships based on need are always available.
It is the hope that this new fee structure better reflects our values — that the entire congregation, through its pledging, supports programming for our children and youth, and for the music which adds such richness to our worship.

There was some confusion and inconsistency in our application of this new structure last year, so a full analysis of the impact of this change won’t be feasible until the conclusion of this year’s fund drive and RE and Music Registrations are in.

**Stewardship Committee**

The Stewardship Committee comes and goes at First Unitarian. Members of the most recent iteration of the committee served ably for several years, and after considerable research they helped establish a much-shortened Annual Fund Drive. AFD2017 will be the third year to use this abbreviated approach.

The committee disbanded at the end of FY2015, as E.T., staff and a key lay leader considered how best to engage our congregants in the church’s fund-raising efforts. The Stewardship Committee won’t be reconstituted in the coming year. Instead, we are inviting past annual fund drive advocates and volunteers to take a more active role, and keeping them involved and informed. An AFD Volunteer Round-Up will be held in mid-September. Volunteers will meet this year’s AFD Co-Chairs Kate Birdsall and Darin Stewart, Bill will speak about our plans for the new church year, and staff will be there to acquaint volunteers with the AFD process and begin matching up interests with tasks at hand.

7) Original: 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.

Revised: The ministers and congregation develop and maintain relationships with other Unitarian Universalist congregations and institutions and the local interfaith community, helping to provide leadership in the larger Unitarian Universalist movement and community.

ET Interpretation: Individual leaders, both ordained and lay, will continue to offer their gifts of leadership to our larger family of faith and the local religious community. That leadership grows out of the vibrancy of our ministry and the caliber of our leaders. Relationships will be maintained with the neighboring congregations, area UU ministers and the interfaith community.

ET Assessment: We believe we are in compliance.

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Measures: Monitoring is to be done by report of involvement by ministers and others in the community, district and national levels. This Element will not longer be included in the congregant survey.
8) 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.

ET Assessment: We believe we are in compliance as indicated by the extensive involvement of congregants in our justice work and the on-going witness of our ministers.

Responses in the Congregational Survey rated “Witnesses as a voice of conscience in our community, collaborating with other justice-seeking institutions, encouraging congregants to promote social justice in the Portland community and beyond”.

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As many as 750 congregants are active in our social justice ministry in some way.

Highlights:

SJ Program Highlights:

- Launched a new series, “Beyond Violence: A Spiritual Journey,” in which all the action groups worked together to bring a central focus to our work while also producing a well-crafted array of films and speakers.
- Offered All-Church Dialog experiences for our congregation on the topics of: 1) Race, 2) Palestine/Israel; 3) Social Media and Online Ministry; and 4) The Syrian Refugee Crisis
- Welcomed Tim DeChristopher as our 2016 Sewell Lecturer. His lecture was followed by a networking potluck and two workshops, thus ensuring that his ideas would find traction in our community.
- Contributed time, talent and presence to our Sunday Soul experiment.
- Organized a Suicide Prevention Presentation for our youth and their parents.
- Organized a powerful Pride Parade experience in the face of the Orlando tragedy.