

VISION 2020

A Strategic Plan

for

ST. JAMES LUTHERAN CHURCH

PORTLAND, OREGON

“Looking to 2020 and beyond”

Adopted by Church Council

May 19, 2015

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Introduction

Strategic planning at St. James was launched eighteen months ago when the Church Council selected a Core Planning Team. Commissioned at Sunday morning worship on October 20, 2013, we – the CPT - have since then met more than twenty-five times, at last count, for over 100 hours. We have worked diligently to engage our fellow members and congregational leaders in crafting a road map for the future of St. James looking toward the year 2020 and beyond. Our members include Pastor Dennis Andersen, Warren Cook, Leon Gogl, Greg Gonzalez, LaVon Holden Willard Kniep, Sylvia Lee, Janet Nelson, and Ann Tohlen.

Our work has included a needs assessment conducted with the Church Council; interviews with the pastors of our neighbor churches; a deep analysis of who we at St. James are; and the use of demographic data and tools to understand the changes taking place in our neighborhood, city and region. Multiple “Open Space” sessions and focused coffee hour discussions, held on Sunday mornings, have been valuable tools for gaining input and feedback from St. James members as our work has progressed. We asked the congregation to complete a survey to provide guidance for our work and 62 members obliged. The St. James newsletter has included monthly updates on our progress and we have provided the Church Council with regular reports and opportunities for input.

The results of our inquiry are summarized in the supporting materials (included in this report’s second section) and reflected in the mission, vision, values, and strategic initiatives that are at the heart of Vision 2020. This plan lays out ten strategic goals that we believe will enable us to continue and expand our ministries in downtown Portland as we move into the third decade of this century. We believe that we have the talented and dedicated leadership, both professional and lay, that will be necessary to achieve these goals. With this leadership we believe that St. James will realize and expand its potential by involving ever more of our members in participating in and supporting our ministries.

The congregation of St. James – as we know it today and as we plan for its tomorrows – is a product of nearly 125 years of history in which it has been confessing Jesus Christ as Lord and Savior and preaching the Gospel, as recorded in Holy Scripture and affirmed in the ecumenical creeds and Lutheran confessions, of the power of God to create and sustain the Church for God’s mission in the world. The Vision 2020 plan is based on our belief that we have all been loved and called by God into this community of believers, a community that embraces a Lutheran tradition of worship centered in Word and Sacrament and a rich liturgical and musical expression that lifts up the grace of the loving God.

It is against this backdrop, then, that we offer the statements of Mission and Vision, and the Core Values that make St. James a unique community, all of which are reflected in the strategic goals and initiatives that are at the core of Vision 2020. These strategic goals, and

corresponding initiatives, reflect both our desire to lay the foundation for future generations to continue doing ministry in this place – just as prior generations laid the foundation for us – and our commitment to living the values we embrace at St James.

Worship and prayer are at the core of who we are at St James. We are blessed to have excellent worship and music leadership and we embrace a richness in liturgical, musical and creative expression. The strategic initiatives proposed in this plan are intended to bring excellence to all aspects of life at St James.

ST. JAMES LUTHERAN CHURCH

Mission

In the central city, St. James welcomes all and celebrates God's grace and inclusive love with the gifts of Word, music, classic Lutheran liturgy, hospitality and service.

Vision 2020

We strive to be a vibrant active congregation inspired by God's unconditional love for all people through Jesus Christ. There is a place for you here: to gather in worship uplifted by music and the arts, striving for justice and peace; empowered by the Holy Spirit and reaching out in loving service to the community and the world.

Our Core Values

Worship and the Arts:

Embracing our liturgical and musical heritage, music and art are integral parts of our worship and our life in the St. James community ∞ Valuing creative expression that reflects both beauty and hope in the grace of the loving God ∞ Delighting in a faith that is ever new, infused with a message for the needs and concerns of our contemporary world.

Inclusiveness, fellowship and hospitality:

Embracing the message of God's love for all people at all times in all places ∞ Welcoming all regardless of age, race, ability, circumstance, background, gender, gender identity or sexual orientation ∞ Showing hospitality, treating each person with dignity and love and being in fellowship with one another and all who enter here.

Stewardship as a response to God's love:

Living our lives in response to God's love, including our families, our homes, our financial resources, our bodies, and our environment ∞ Caring for our central city properties ∞ Giving generously to ministries that change lives every day.

God's creation and our place in it:

Affirming all of creation is good ∞ Taking responsibility for caring for the earth and all that is in it ∞ Living lives that reflect our care for the world.

Justice and compassion:

Living our faith in the world ∞ Advocating for justice and seeking good for all ∞ Responding to human needs through loving service ∞ Respecting the dignity of every human being ∞ Seeing and serving Christ in all persons ∞ Integrating social, economic and environmental justice into our lives.

VISION 2020: Strategic Goals

Laying the Groundwork for Future Generations

These four strategic goals address physical and structural needs of the church buildings, energize our governance structure, develop new leaders, stabilize funding and ensure adequate staff, which together will lay the groundwork for a new generation to do ministry in and from this place. We believe these initiatives can be substantially realized within five years.

Governance: Re-energize and streamline decision making by completing the revision of the St. James constitution, developing bylaws to define and revitalize the committee structure, and training and mentoring a new generation of leaders.

Finance: Ensure financial stability to support our ministries, maintain transparency, and provide regular, accurate and complete financial information to the Council and Congregation.

Property and Facilities: Ensure the sustainability, accessibility, and safety of the St. James properties to enable continued ministry in the central city.

Staffing: Develop and carry out short and long term staffing plans that will enable St. James to carry out its ministries

Living Our Values

The following strategic goals focus on ministries and activities for carrying out our mission. They reflect our commitment to living out our values in and with the community of St. James and in our day to day lives. These are timeless values, embraced from generation to generation.

Stewardship: Develop a spirit of generosity and abundance; grow member commitment to stewardship and foster stewardship in support of the growth and ministries of St James; broaden member understanding of stewardship as central to our faith.

Christian Education: Establish a consistent and intentional program of Christian education for all ages that focuses on biblical and theological literacy, liturgical fluency, spiritual practices, and living out our values.

Social Ministry: Coordinate and support on-going social ministries at St. James, assess unmet needs in our community that may be addressed by our social ministries, and explore how social ministries may be strengthened through joint programs with other downtown churches. Provide opportunities for all age levels to engage in service to others.

Outreach: Communicate our identity throughout our community, strengthen our connections with PSU students and staff, seek ways to collaborate with neighbor churches in joint ministries, and provide hospitality to all who engage with St James and its members.

Reconciling in Christ: Lift up the identity of St. James as a Reconciling in Christ congregation embracing inclusiveness and welcoming of all.

Caring for Creation: Develop Care for Creation as an integral part of the programs and activities of St. James.

STRATEGIC INITIATIVES

GOVERNANCE

THE GOALS OF THIS INITIATIVE:

- Re-energize and streamline the decision-making structures of St. James.
- Complete a revision of the St. James constitution and bylaws that achieves consistency with ELCA requirements and that makes the rules and structures for governance more easily accessible.
- Establish a committee structure that is effective in pursuing the congregation's mission and that provides clear guidelines for how committees are populated, for their scope of work, for the responsibilities of committee members, and for how each committee is accountable to the Council and the congregation.
- Develop strategies for identifying and preparing members of the congregation to participate in committee work and other leadership roles.

RELATIONSHIP TO MISSION/VISION AND CORE VALUES OF ST. JAMES.

This initiative is a clear reflection of the value we place on inclusiveness and of the importance of effective leadership in attaining our vision of St. James as a vibrant active congregation. With successful completion, this Initiative will result in opportunities for more members to participate in the governance and business of the congregation.

RELATIONSHIP TO OTHER STRATEGIC INITIATIVES

A streamlined and improved decision-making structure will be key to adoption and implementation of other Initiatives. Because other initiatives will require clarity about decision-making structures, it will be important for this one to have a high priority early on.

ACTIONS AND EVENTS.

Task 1: The Church Council will, upon adoption of the strategic plan, establish a Task Force to carry out this initiative. The members of the Task Force will include the vice president and one other member of the Church Council, two members of the congregation not currently on Council, a member of the Core Planning Team, and the Pastor of the congregation in an advisory role.

Task 2: The charge to the Task Force will be to review current governance documents along with recommendations from Synod in light of the goals of this initiative and to recommend, in time for the 2016 annual meeting of the congregation, revisions to the Constitution including new or revised bylaws that address the following issues, among others:

- a. Clarification of the number and purposes of the Congregational meetings. (*Bylaw C10.01.01*.) CPT recommends a bylaw requirement of three congregational meetings per year with purposes as described in the current bylaws.
- b. Clarification of the process for selecting voting members to the annual Synodical Assembly. (*Constitution C5.04*) CPT recommends election of voting members at the annual meeting of the congregation.
- c. Size, membership, and agenda of the Church Council. (*Constitution, Chapter 12.*) CPT recommends the following:
 - I. That a bylaw addressing size, membership, and agenda be developed under C12.01, and include a provision for orientation and training of council members.
 - II. That members of the Council serve on a standing committee and have responsibility for bringing reports and recommendations to the Council.
 - III. That meetings of the Council be organized by an agenda that includes regular reporting from each standing committee.
- d. The committee structure of the congregation, including identification of standing committees, the scope of their concerns, how they are populated, how they are represented on Church Council, and how they report to Council. (*Constitution C13.06 and C13.07*). CPT recommends the following:
 - I. That bylaws be developed for this section of Chapter 13.
 - II. That the following be included as standing committees with representation on the Council: Worship and Music; Christian Education; Property and Facilities; Social Ministry; Finance; Stewardship; Outreach; and Nominating.
 - III. That a rotation policy for membership on Church Council, standing committees, and advisory boards be included. Such a policy should ensure continuity by creating a balance between new and experienced members.
 - IV. That an outline of goals and scope of concerns be developed for each committee.
 - V. That each of these committees will have a member who is also a member of Church Council, charged with bringing reports and recommendations for the committee to the Council.
 - VI. That the scope of the Nominating Committee be expanded to include a role in populating standing committees. (*Bylaw C13.02*)
 - VII. That the scope of the Executive Committee (*Bylaw C13.01*) be expanded to include serving as the Personnel Committee.

Task 3: The Church Council, following the 2016 annual meeting, will form a subcommittee from within its membership, to undertake the following tasks:

- a. Devise and carry out a plan for populating standing committees for 2016.
- b. Develop an on-going plan for inviting congregational members to serve on committees and in other leadership activities and to provide orientation and training for those contemplating service and leadership roles.

RESPONSIBILITY

The Executive Committee will recommend candidates for membership on the Task Force on Governance to the Council.

The Church Council will establish the Task Force.

The Church Council will receive the work of the Task Force on Governance and forward it to the Congregation with its recommendations for adoption.

The Church Council will take responsibility for populating standing committees.

TIMELINE

The work of the Governance Task Force will be completed within a six month time frame, beginning on July 1 and culminating with recommendations to the congregation at its annual meeting in January 2016.

The Church Council's subcommittee will, of necessity, complete its task of populating 2016 committees by the regularly scheduled February, 2016 meeting of the Church Council.

Completion of the on-going plan for recruitment and training should be completed by the annual meeting of 2017.

FINANCE

THE GOALS OF THIS INITIATIVE:

To ensure financial stability, maintain transparency and provide accurate and complete financial information to the Council and Congregation.

RELATIONSHIP TO MISSION/VISION AND CORE VALUES OF ST. JAMES

Our ability to carry out our mission and to attain our vision of St. James as a vibrant, active congregation will be strengthened by improving our financial outlook. This initiative strongly reflects the value we place on being good stewards of the gifts God has given us.

RELATIONSHIP TO OTHER STRATEGIC INITIATIVES

Success in carrying out this initiative, in concert with the Stewardship Initiative, will be key to the success of many of the other initiatives in this strategic plan. Several of these initiatives will benefit from additional resources and additional staff in their implementation. At the same time, successful completion of the Finance Initiative will be dependent upon our ability to implement changes in governance, education, and stewardship as spelled out in initiatives in those areas.

ACTIVITIES AND EVENTS

This initiative builds on the hard work and diligence of the members of the current Finance Committee. Successful implementation of this Initiative will require activities and events aimed at accomplishing the following four tasks:

Task 1: Adopt interim financial and fiscal policies and procedures until such time as a complete Fiscal Policies and Procedures manual can be completed and adopted.

These interim policies and procedures, to be adopted by the Church Council upon approval of this strategic plan, will require the following:

1. A refined approach by the Treasurer and bookkeeper to providing clear and timely information to the congregation regarding revenues and their relationship to expenses of the operating budget or other designated funds.
2. The Treasurer and Finance Committee to prepare and present for approval by the Church Council and presentation to the congregation (at the annual meeting in

- 2016, and thereafter at the Fall congregational meetings) a clear, multi-year set of financial priorities that includes:
- a. Adequate and reliable financial resources, effectively managed, to support church ministries and required staff and facilities infrastructure.
 - b. A goal of increasing congregational support as a percentage of the budget.
 - c. Continuation of St. James commitment to support the Oregon Synod and the ELCA.
3. The Treasurer, with the support of the bookkeeper, to create a combined Financial Report and Balance Sheet, including all component units (St James General and Special Funds, Bach Cantata, Endowment general and Designated Funds, Foot Clinic, Child Development Center, and St James Apartments) to be reviewed and approved by the Church Council and the Congregation at its annual meeting beginning in 2016. This report should articulate the ways in which financial resources are being utilized to enable St. James to carry out its mission of service.

Task 2: Review and adopt recommendations of the Financial Review Task Force and additional recommendations from the Core Planning Team.

The Executive Committee of the Church Council will bring formal recommendations to the Council concerning adoption of the following proposals along with recommendations for how each is to be completed. The proposals are to:

1. Develop a Fiscal Policies and Procedures manual, which should include the interim policies developed as part of Task 1.
2. Establish monthly and quarterly reporting requirements of all component units to be reviewed by the Finance Committee and the Church Council. Policy documents for all component units should be amended to require at least quarterly reporting to Church Council from Endowment, Special Funds, Housing and Foot Care, and monthly for CDC and St James congregational budget.
3. Develop a Conflict of Interest questionnaire along with procedures for completing the questionnaire by Church Council members and the boards of component units – CDC, St. James Apartments, Endowment - and keeping them on file.
4. Develop and adopt policies for receiving gifts to the congregation, including cash, stocks, bonds, and real property. The policy should include a method for determining if a particular gift of real property should be received and how it might benefit the ministry of St James, as well as a method for tracking proposed uses of donations and dealing with funds that remain dormant/inactive for a term of five years or longer.

5. Use ELCA guidelines, to develop and adopt a document retention policy for all finance related documents.
6. Develop and adopt a review and approval policy for bank records and check registers as recommended by the Financial Review Task Force.
7. Develop and adopt a “whistle blower” policy to ensure financial transparency and accountability throughout the organization.

Task 3: Streamline accounting and reporting of designated funds.

To complete this task, the Finance Committee will review the sources of and documentation for each of the many designated funds currently on the financial books. By the 2016 annual meeting, they will develop and recommend policy to the Church Council for retiring dormant/inactive funds and will explore and recommend ways to make the funds budget relieving if deemed appropriate.

Task 4: Review and revise, if appropriate, investment and dispersal policies for the St. James Endowment.

The Endowment Board will undertake this review and will report their findings and conclusions to the Church Council. The review should include policies related to types of investment, allocation to investment categories, types of activities to be funded by the Endowment, application process for requesting endowment funds, and the formula for deriving the amount of funds available annually for distribution/grants.

RESPONSIBILITY

The Church Council will have responsibility for adopting the interim policies and procedures outlined in Task 1. The Finance Committee, the Treasurer, and the bookkeeper will all play a role in carrying them out.

The Executive Committee will have responsibility for forwarding proposals as described in Task 2 to the Church Council.

The Finance Committee will have responsibility for bringing recommendations concerning designated funds to the Church Council.

The Endowment Board will be responsible for carrying out the review in Task 4 and reporting to the Church Council.

TIMELINE

Work on Task 1 should begin immediately upon adoption of the strategic plan, July 2015, and be completed by the time a successor Finance Committee is in place, February, 2016.

Work on Task 2 should commence no later than February, 2016 with a full range of policies and procedures adopted and codified in a manual by February, 2017.

Work on Task 3 should be undertaken by the Finance Committee that is in place in February, 2016, with recommendations completed by August 2016.

Work on Task 4 may begin immediately upon adoption of the strategic plan, with any new policies or procedures in place at the beginning of the year 2016.

PROPERTY AND FACILITIES

THE GOALS OF THIS INITIATIVE:

The overall goal is to enhance the sustainability, accessibility and safety of the St. James properties (chapel, sanctuary, and office/education wing) in order to continue doing ministry from our location in the central city. Successful completion of this Initiative will result in:

- Facilities with appropriate systems and safety upgrades.
- Facilities that meet safety standards and are functional, accessible, secure, well cared for and provide a place in and from which ministry happens.
- Preservation of historic artifacts and documents.

RELATIONSHIP TO MISSION/VISION AND CORE VALUES OF ST. JAMES.

Successful completion of this Initiative will enable us to continue to carry out our mission in the central city and will be key to attaining our vision of St. James as a vibrant active congregation reaching out in loving service to our community. It is reflective of core values embracing our heritage through worship and the arts and acting as stewards of our central city properties in response to God's love.

RELATIONSHIP TO OTHER STRATEGIC INITIATIVES.

This Initiative is interdependent with several other initiatives, most notably:

- With the Finance Initiative because the necessary work will require funding.
- With the Stewardship Initiative because doing this work is required if we are to be good stewards of our building assets. This work may also require a capital fund campaign.
- Outreach Initiative because the ministries of the church reach out to the community from this location.
- Worship, because furnishings, musical instruments and artwork would be protected.

ACTIONS AND EVENTS.

This Initiative will build on the good work of the various individuals and committees who have been responsible for the care and maintenance of our facilities and will be comprised of the following three components:

Component 1: Develop and carry out plans for near term and long term maintenance.

The first step in carrying out this component of the Initiative will be to establish a Property and Facilities Committee, consistent with the recommendations in the

Governance Initiative. This new committee will combine the membership and functions of the current Property Committee and Architectural Review Committee in order to facilitate clear communication and coherence in planning and carrying out maintenance and infrastructure upgrades.

The Property and Facilities Committee will be charged with developing a Master Facilities Plan that articulates short and long term maintenance activities and that provides for review and reporting on progress. The master plan should, at a minimum, address the following:

- a. A five-year and a ten-year maintenance program, as well as identify standards for ongoing (day-to-day) maintenance.
- b. Identify paid staff and volunteers needed to maintain/continuously update the maintenance plan, as well as carry out the work identified in the plan.
- c. Ensure that facilities comply with fire, safety, ADA and other regulatory requirements.
- d. Assume that current programs and personnel will not be in place over the five-year plan.
- e. A mentoring program for new committee members and volunteers.
- f. Methodology for maintaining maintenance records and files in a central, accessible location.
- g. Good stewardship of our historic building and furnishings.
- h. Regular communication with the congregation about facility needs and challenges.
- i. Method for ensuring that maintenance needs are included in the multi-year financial priorities/plan and the annual budget.

The Property and Facilities Committee shall work with the Finance Committee in the creation of an operating budget that realistically accounts for and includes funding for the costs of maintaining the facilities.

Component 2: Complete seismic review and plan for system upgrades.

Responsibility for carrying out this component of the Initiative will rest with the Task Force already established by the Church Council to study the feasibility of and make recommendations regarding seismic retrofits and needed systems upgrades. In the months ahead, the Task Force will:

- a. Receive the results and recommendations of the engineers' study of the potential vulnerabilities of the St. James buildings in a major seismic event.
- b. With inputs from engineers, architects, and contractors arrive at an estimate of the scope of work needed to upgrade and strengthen the buildings against a major seismic event and to upgrade major building systems.

- c. Develop an estimate of costs both for the entire project and for each of several phases that comprise the project.
- d. Develop potential plans for financing the project which may include a capital campaign, refinancing existing debt on the St. James Apartments, and other approaches that may be deemed appropriate.
- e. Convene congregational meetings to discuss and to get guidance from the congregation on what direction they want to take going forward. Discussion and decision-making should include a full understanding of what St James will look like and how it will function if we proceed with the recommended work and what changes to ministry will be necessitated by a decision not to proceed, as well as cost and financing.
- f. Submit recommendations to the Church Council, and ultimately to the Congregation, regarding whether or not to proceed with the project to undertake seismic upgrades and retrofits and necessary major systems. A recommendation to proceed should include plans for financing, scope and phases of work, timeline, and other elements deemed appropriate and necessary.

Component 3: Historic Preservation – Inventory, preserve and maintain art works and historic documents.

To carry out this component the Church Council will establish an ad hoc committee drawn from the membership of the Property and Facilities Committee, the Worship Committee, the Altar Guild, and other members of the congregation with an interest in historic preservation. This ad hoc committee will be charged with developing and presenting to Church Council a plan for historic preservation which will include at least the following elements:

- a. Develop a plan for conserving stained glass windows, art works, musical instruments, liturgical furnishings, archives and documents.
- b. Update and maintain the inventory of historical documents, art works, musical instruments, liturgical furnishings, archives and documents.
- c. Develop criteria for acceptance of artwork, musical instruments and furnishings
- d. Identify staffing needs, including volunteers and paid staff, needed to carry out this Initiative.
- e. Make a recommendation regarding which standing committees, if any, shall have ongoing responsibility for historic preservation.

RESPONSIBILITY

In regard to Component # 1, the Church Council will have responsibility for establishing the Property and Facilities Committee, as described above, for approving and receiving reports

on the Master Facilities Plan, and for the submission of a congregational budget that includes the costs of facility maintenance.

In regard to Component # 2, the Church Council will receive regular reports on the seismic upgrade project and will be responsible for forwarding a recommendation to the congregation about whether to proceed with the project.

In regard to Component # 3, the Church Council is responsible for establishing and receiving regular reports from an ad hoc committee on historic preservation.

TIMELINE

An interim Property and Facilities Committee will be established in July 2015. They will complete a Facilities Master Plan and maintenance budget for approval by the Church Council prior to the annual meeting in January, 2016.

An on-going Property and Facilities Committee will be populated by the Church Council convened by no later than March, 2016. Their charge will be to refine and carry out the Facilities Master Plan.

The work of the Task Force on seismic upgrades will continue through the months ahead. Target dates should be established for congregational input meetings. Recommendations on whether or not to proceed should be completed by not later than the annual meeting in January, 2016.

The ad hoc committee on historic preservation will be established by the Church Council in February, 2016. The work of the committee should be completed prior to the annual meeting in January 2017.

STAFFING

THE GOALS OF THIS INITIATIVE:

To develop and implement a plan to ensure that by 2020 St. James will have sufficient staff to carry out its mission and ministries, including administrative support for the day-to-day functioning of the congregation and its programs, the staff to provide adequate care and maintenance of our facilities, and programmatic support to enable our professional staff to carry out the ministries to which they were called.

RELATIONSHIP TO MISSION/VISION AND CORE VALUES OF ST. JAMES.

It is difficult to imagine that we can attain our vision of ourselves as a “vibrant active congregation” unless we have adequate staff to support our mission and ministries.

RELATIONSHIP TO OTHER STRATEGIC INITIATIVES

Being able to fully realize this Initiative will require successful Stewardship and Finance Initiatives. Several other initiatives – notably Property and Facilities, Social Ministry, and Outreach – will benefit greatly from our ability to achieve the goals of this Initiative.

ACTIONS AND EVENTS

The Executive Committee, which functions as the congregation’s personnel committee, will be charged with carrying out this Initiative. Among the actions they will take are the following:

1. Carry out (or cause to be carried out) an assessment of how well the following organizational needs of the congregation are being met by current staffing, including:
 - a. Administrative support for the day-to-day functioning of the congregation, including but not limited to:
 - i. Provision of daily hospitality and security (reception).
 - ii. Clerical support to professional staff and volunteers.
 - iii. Bookkeeping.
 - iv. Communications, publications and social media.
 - v. Volunteer recruitment and coordination.
 - b. Staffing for property and facilities support, including:
 - i. Building systems and utilities
 - ii. Routine and long-term maintenance and repair
 - iii. Sexton for preparation and support for events and programs.
 - c. Support for professional staff to enable them to carry out the ministries for which they were called, including:
 - i. Outreach
 - ii. Campus ministry
 - iii. Liturgy and music

2. Prepare a report of the staffing needs assessment for the Church Council which will be presented to the Congregation at the annual meeting in January, 2016.
3. Develop a staffing plan, to be phased in over 3 – 5 years, to meet the organizational needs of the congregation as identified in the report of the staffing needs assessment. This plan should be developed in consultation with the Pastor and Minister of Music, and the Property and Facilities, Stewardship, and Finance committees. It will be submitted to Church Council and reflected in the congregational budget for 2017. It will include:
 - a. A description of staff positions needed to adequately support each of the three areas of organizational need, i.e. administrative, facilities, and programmatic.
 - b. Job descriptions for each staff position.
 - c. The estimated cost of filling each of the identified positions.
 - d. A year by year plan which establishes an order of priority for filling each of the positions and identifies additional financial resources needed each year to meet those priorities.
 - e. An on-going process for assessment that will address, at least annually, the following:
 - i. How well staff members are performing the roles and duties described in the job description of their position.
 - ii. How well staffing patterns are meeting the organizational needs of the congregation.
 - iii.
4. Assume responsibility for oversight of the approved staffing plan and provide regular reports and updates to the Church Council and congregation.

TIMELINE

The Executive Committee will begin the staff needs assessment immediately upon adoption of this Strategic Plan, the results of which will be reported at the annual meeting in January, 2016. The staffing plan will be completed during 2016 and submitted for adoption in January 2017 after which the plan will be phased in over 3 – 5 years.

RESPONSIBILITY

Responsibility for this Initiative will fall most heavily on the Executive Committee and indirectly on the Church Council.

STEWARDSHIP

THE GOALS OF THIS INITIATIVE:

Foster stewardship in support of the growth and ministries of St. James; develop a spirit of generosity and abundance; grow member commitment to stewardship; and broaden member understanding of stewardship as central to our faith.

RELATION TO MISSION/VISION AND CORE VALUES OF ST. JAMES

We claim stewardship as one of our core values at St. James. Stewardship speaks to the corporate and individual responsibility of caring for and sharing God's gifts in support of our church, our community and our world and, in this sense, is at the core of who we are, what we value and how we live.

RELATIONSHIP TO OTHER STRATEGIC INITIATIVES

This Stewardship Initiative must be carried out hand-in-hand with the Finance Initiative, since the successful completion of both will be key to the success of many of the other initiatives in this strategic plan. Several of those initiatives will greatly benefit from additional resources and additional staff in their implementation.

ACTIVITIES AND EVENTS

A Stewardship Committee, defined and formulated as a result of the Governance Initiative, will be charged with carrying out the tasks of this Initiative which build on the work of the 2104 Stewardship Committee. The Stewardship Committee, will of necessity, work closely with the Finance Committee. (The Task Force on Governance may consider combining finance and stewardship within one committee or of making Stewardship a subset of Finance.)

1. The Stewardship Committee, in collaboration with the Finance Committee, will:
 - a. Communicate a clear, multi-year set of financial priorities to the congregation.
 - b. Regularly communicate financial information to the congregation in ways that will increase member awareness about what funds are needed versus what funds are received.
2. The Stewardship Committee will work with other committees, especially the Caring for Creation Committee, Christian Education Committee and the Worship and Music Committee, to plan stewardship-focused activities and events that will take place

throughout the church year, not just as part of a stewardship campaign. These activities and events will:

- a. Encourage pledging as a regular part of our spiritual practice; a commitment leavened with joy and gratitude.
 - b. Provide educational opportunities that focus holistically on stewardship as a way of Christian life.
 - c. Promote a full concept of stewardship that fosters ownership of the ministries of St. James among its members.
3. The Stewardship Committee will orchestrate activities throughout the year that celebrate gifts of time and talent, as well as financial gifts. Consideration should be given to implementing the following ideas:
- a. Create a spiritual gifts inventory to match the skills and gifts of members to the needs of the church and the community. (Could be something as simple as a questionnaire to determine what members perceive as their gifts and how they would like to be involved at St James or a more complete spiritual gifts program with a volunteer coordinator, which would require either dedicated volunteer or staff time.)
 - b. Document and communicate the need for volunteers in carrying out the ministries of St James.
 - c. Encourage members to generously share their time and talents to sustain a proactive and engaged St James community of faith.
 - d. Provide outreach experiences that will utilize members' time and talents to contribute to God's creation in tangible ways.

RESPONSIBILITY

In the short term, the Church Council and Finance Committee will need to provide leadership in stewardship through the remainder of 2015.

Beginning in March, 2016, a Stewardship Committee, either as part of the Finance Committee or standing on its own, will begin the process of planning and carrying out the activities and events described above. Ultimately, it will be the responsibility of every member of St. James to ensure that this Initiative is successful.

TIMELINE

The work of a reconstituted Stewardship Committee will begin no later than March, 2016 and will be on-going thereafter.

CHRISTIAN EDUCATION

THE GOALS OF THIS INITIATIVE:

Establish a consistent and intentional program of Christian education for all ages that focuses on biblical literacy, liturgical fluency, spiritual practices, and living out our values.

RELATIONSHIP TO MISSION/VISION AND CORE VALUES OF ST. JAMES

A well thought out and robust program of Christian Education will be critical in helping St. James realize its vision of itself as a vibrant, active congregation.

We believe that as a congregation, St. James aspires to include education as one of its core values. This Initiative will help us to realize that aspiration.

RELATIONSHIP TO OTHER STRATEGIC INITIATIVES

There is a direct and obvious relationship between this Education Initiative and the Caring for Creation, Reconciling in Christ, and Social Ministry Initiatives all of which include education components. And education will be a major part of carrying out the Stewardship Initiative.

ACTIONS AND EVENTS

1. The Church Council (upon adoption of the Strategic Plan) will form an interim Education Committee responsible for planning programs in Christian education until a permanent committee is convened, no later than March 1, 2016 to plan a seasonal program for children and adults, and include new member instruction and baptismal preparation.

The interim Education Committee will plan, in consultation with the Pastor and Minister of Music, a program for children and adults that may include:

A seasonal program for children.

Topical offerings for adults through Open Space and the Let the Light Shine series.

Other offerings and opportunities for Christian education that may be deemed appropriate.

2. Following the 2016 annual meeting of the congregation, the reformulated Education committee will be established by Church Council and convened no later than March 1, 2016. In subsequent months, the Education Committee will carry out its charge which will include the following:
 - a. Develop and carry out an assessment of the education needs and desires of the members of St. James.

- b. Develop and carry out an inventory of the talents, interests and resources among the members of St. James who may be helpful in carrying out educational programs.
- c. Develop goals, guidelines, and priorities for programs of Christian education at St. James including but not limited to:
 - Formative experiences for children and young people as they encounter scripture and worship.
 - Programs that contribute to Biblical literacy focused on the intersection of scripture and daily life, including Bible study at a time and place that is more accessible to more congregants.
 - On-going programs to instruct members in all aspects of what it means to be Lutheran and a member of St. James.
 - Instruction for new members and for those preparing for baptism.
 - Diverse adult faith formation opportunities that nourish spirituality: on-going series, Bible studies, book studies, one-time events, etc. Advent and Lenten topics that are offered during the specific season.
- d. Working with the Property and Facilities committee, propose ways to utilize at least some of the space in the CDC wing for educational programming on weekends when it is vacant.
- e. Encourage, and provide resources for, at home spiritual practices.

TIMELINE

Activities related to this Initiative will begin, upon adoption of the strategic plan, with establishing of an interim committee. By no later than March 2016 the permanent Education Committee will convene to carry out the charge described in this Initiative.

RESPONSIBILITY

The Church Council will be responsible for establishing the interim committee and for hearing reports from that committee and the permanent committee that replaces it. In addition to the Education Committee, the Pastor and Minister of Music will also play a role in carrying out this Initiative.

SOCIAL MINISTRY

THE GOALS OF THIS INITIATIVE:

Coordinate and support the ministries of advocacy and service at St. James, assess unmet needs within the congregation and within our community, and explore how social ministries may be augmented through collaboration with other programs of St. James and joint activities with other downtown churches.

RELATIONSHIP TO MISSION/VISION AND CORE VALUES OF ST. JAMES.

There is a place for you here. Social ministry is our mission in action. We share our vision and values of inclusiveness, fellowship, compassion and justice, demonstrating our concern for community through collaborative action.

RELATIONSHIP TO OTHER STRATEGIC INITIATIVES

Like other program based initiatives, the Social Ministry Initiative relies on volunteers and will benefit from increased volunteer support through the Stewardship Initiative and organizational support through the Governance Initiative. Its shared values and goals coordinate with initiatives from the newly established Outreach and Caring for Creation committees, as well as those of Reconciling in Christ and Education.

ACTIONS AND EVENTS

A Social Ministry Committee, defined and formulated as part of the Governance Initiative will be charged with carrying out this Initiative which will build on the efforts of many volunteers engaged in social ministry on a variety of fronts. The reformulated committee will be populated by the Church Council and convened after adoption of the recommendations of the Governance Task Force. The Social Ministry Committee will be charged with carrying out the following tasks:

- Task 1: Review, assess, and compile a description of current and on-going social ministry activities. Share the results of this compilation with the congregation along with information about how members can become involved in social ministry.
- Task 2: Act as coordinating body and clearinghouse for ministries of advocacy and service at St. James.
 - a. Assess unmet needs within the congregation and community and develop a coordinated plan for social ministries along with a structure that best supports its goals and activities. Include mechanisms for on-going assessment of existing projects and for soliciting input on potential ministries from congregational members.

- b. Identify those social ministry needs, programs and activities which can be best served by collaboration with other committees including Outreach, Education, Caring for Creation, and Reconciling in Christ.
- c. Develop a plan for communication, within the committee, with other committees, and with the congregation.

Task 3: In collaboration with the Outreach Committee, contact neighbor downtown churches and schedule exploratory meetings to assess the possibilities of joint social ministry projects in downtown Portland.

TIMELINE

The reformulated Social Ministry committee will be convened no later than March, 2016. The committee will develop its own timeline for carrying out its tasks as outlined above.

RESPONSIBILITY

The Church Council will be responsible for populating the committee upon adoption of recommendations of the Governance Task Force. Members of the Social Ministry committee will be responsible to the Church Council and the congregation for communicating details of all activities and events.

OUTREACH

THE GOALS OF THIS INITIATIVE:

Communicate our identity throughout our community, strengthen our connections with the community at large, with PSU students and staff, and seek ways to collaborate with neighbor churches in joint ministries.

RELATIONSHIP TO MISSION/VISION AND CORE VALUES OF ST. JAMES.

There is a place for you here. Outreach is how you make yourself known, sharing your values, encouraging participation and membership.

RELATIONSHIP TO OTHER STRATEGIC INITIATIVES.

Active Outreach will require staff or volunteers and will therefore interface with Finance, Stewardship and Governance. It will also interface with Education, Social Ministry, Caring for Creation and Reconciling in Christ.

ACTIONS AND EVENTS.

An Outreach Committee will be established as part of the Governance Initiative and will be fully populated and convened after the annual meeting of the congregation in January, 2016.

The charge to the Outreach Committee will be to focus, in the first year of their existence, on the following areas:

1. Communication.
 - a. Undertake an assessment of the effectiveness of St. James communications strategies, for both internal communications and for external outreach. This assessment should include effectiveness of the St. James website, the use of social media, the use of traditional media, and relationships and representation to other groups and organizations.
 - b. Develop and present to the Church Council a communications plan prior to the 2017 annual meeting.
 - c. Provide on-going oversight of the communications plan.
2. Hospitality: Develop and carry out a plan – in support of the congregation’s commitment to inclusiveness, fellowship, and hospitality – that will accomplish the following:
 - a. Invite and welcome members of the community to worship and participate in St. James sponsored activities.

- b. Encourage all members to assume responsibility for hospitality; provide training on how to be hospitable and welcoming.
 - c. Involve a broad cross-section of the congregation as greeters, ushers and coffee hosts.
 - d. Have members available after worship services to answer questions about St James.
 - e. Provide volunteers to assist people with special needs in entering, moving about, and leaving the church building and in being able to fully participate in worship services and other activities.
3. Portland State University. The Outreach Committee will be responsible for establishing a St. James presence on the PSU campus through the following activities:
- a. Provide a representative to sit on the Spirituality Committee at PSU and who will serve as liaison between PSU and St. James. (In the interim period, the Executive Committee may appoint this representative prior to the September, 2015 start of the academic year.)
 - b. Have representation at campus events with information about St. James and programs and opportunities that may be of interest to students and faculty.
 - c. Offer and provide service, e.g. space, meals, transportation, as appropriate to student activities and organizations.
4. Collaboration with neighbor downtown churches. The Committee will proactively seek opportunities to expand collaboration with our neighbors, including but not limited to:
- a. Joint worship opportunities (Advent, Lent, others).
 - b. Joint educational programs, for both children and adults.
 - c. Joint social ministries.
 - d. Joint outreach to the downtown business community.

In subsequent years, the focus of the Outreach Committee will expand to engage the local downtown business community, (particularly the Portland Art Museum and Oregon Historical Society), neighboring apartment/condo residents, families of the St. James Child Development Center, and local musicians and artists.

RESPONSIBILITY

The Church Council is ultimately responsible for populating the Outreach committee necessary to complete this Initiative. Staffing concerns would be reviewed by the Finance Committee and the Church Council. The Outreach members are responsible to the Church Council and the congregation for communicating details of all activities and events.

TIMELINE

Appoint representative to PSU Spirituality Committee prior to the start of the PSU 2015-16 academic year. Outreach Committee is populated and convened no later than March, 2016. The Committee develops a timeline for collaborative efforts with neighbor churches. Begin with a letter of introduction to be completed prior to Christmas, 2016.

RECONCILING IN CHRIST

THE GOAL OF THIS INITIATIVE:

To lift up the identity of St. James as a Reconciling in Christ congregation embracing inclusiveness and welcoming of all and to affirm and progressively live out the congregation's active inclusion of all persons, regardless of sexual orientation or gender identity, in the life and ministry of the congregation.

RELATIONSHIP TO MISSION/VISION AND CORE VALUES OF ST. JAMES.

Relates to "Inclusiveness, fellowship and hospitality"; "Justice and compassion"; "stewardship as a response to God's love"; "Worship, music and the arts"; "Social concerns". This has been an historic, stated initiative of this congregation since 1991.

RELATIONSHIP TO OTHER STRATEGIC INITIATIVES.

This Initiative has a dependent relationship with initiatives related to:

- Outreach and Social Ministries – development of inclusive missional outreach modes to marginalized communities and demonstrating hospitality and full integration of all people and their various gifts into the life of the congregation;
- Worship – while affirming the "classic" modes and approaches of worship patterns, being open to inclusive vocabularies and topical concerns of the LGBT communities;
- Education – Intentional inclusion of programming materials, pastoral care and library resources, as well as appropriate graphic materials relating to our inclusive policies in electronic media, exterior signage and regular worship bulletins.
- Property -- Identify locations for appropriate signage illustrating the RIC status of the congregation.
- Finance – Supply information to Finance Committee for annual support of appropriate programming, subscriptions and publicity.

ACTIONS AND EVENTS

Responsibility for this Initiative will be assigned to the Social Ministries Committee. It is recommended that the Social Ministries Committee identify a subcommittee, which may include members who are not part of the Social Ministries Committee to carry out this part of its charge, which will include the following:

Regular review and analysis of website, Facebook, newsletter and Sunday bulletin for “hospitable” vocabularies.

Organize congregational support for participation in neighborhood and city-wide LGBT-friendly events and political advocacy.

Encourage congregational support and participation in local meetings and events related to the Reconciling In Christ organization.

TIMELINE

This Initiative will be on-going in the life of the congregation.

RESPONSIBILITY

Outreach and Social Ministries Committees in consultation with the above committees and with Church Council.

CARING FOR CREATION

THE GOALS OF THIS INITIATIVE:

Develop Care for Creation as an integral part of the programs and activities of St. James.

Communicate, encourage, and advocate for God's call to Care for Creation within and beyond the congregation of St. James.

- Make "care for creation" an essential part of worship at St. James.
- Incorporate creation care and its relationship to social and economic justice into education opportunities offered by St. James.
- Introduce and maintain practices in all areas, including finance, programs, and building and grounds that support sustainable ecological practices.
- Encourage and support members of the congregations in their efforts to care for creation at home and at work.
- Promote eco-justice and care for creation beyond the walls of the church through hands-on involvement, public education, and advocacy opportunities.

RELATIONSHIP TO MISSION/VISION AND CORE VALUES OF ST. JAMES.

A core value of St. James – God's Creation and our place in it – affirms that all of creation is good, and reflects our commitment to take responsibility for caring for the earth and all that is in it and for living lives that reflect our care for the world.

Creation Care is central to our stated vision of a vibrant, active congregation striving for justice and peace and reaching out in loving service to our community and world.

RELATIONSHIP TO OTHER STRATEGIC INITIATIVES.

Because the Caring for Creation committee has been active for the past year and a half, and because the congregation has affirmed its identify as a Caring for Creation church this Initiative is poised to move ahead immediately. The Caring for Creation Initiative will support the initiatives related to St. James's facilities and will interface with initiatives related to Governance, Stewardship, Finance, Education, Social Ministry, and Outreach. As a practical matter, this Initiative will not require additional staff or significant funding to move forward.

ACTIONS AND EVENTS.

1. By resolution, St. James declared itself to be a Caring for Creation church, at its annual congregational meeting on January 25, 2015.

2. The Caring for Creation Committee has been designated by the Church Council as an on-going committee.
3. Going forward, the Caring for Creation committee will organize itself to act as a resource, coordinating body, and advocate for carrying out this Initiative. These organizing activities will entail the following:
 - a. Identify how membership on and leadership of the committee will be sustained.
 - b. Determine a structure that organizes the committee to best support its goals and activities.
 - c. Develop a communication plan and utilize communication practices to support the exchange of ideas and to maintain communication among members of this committee and with other committees of the congregation.
 - d. Develop a plan and assign responsibility for identifying resources and sharing information from ELCA, Lutherans Restoring Creation, EMO, EcoFaith Recovery, and other sources with other committees and the congregation.
4. The Caring for Creation committee will develop strategies for on-going communication with and support of other standing committees of the congregation:
 - a. With the Worship Committee in making “care for creation” an essential part of worship.
 - I. Encourage incorporation of music selections, prayers, and offering practices that emphasize care for creation.
 - II. Encourage incorporation of care for creation themes in sermons and homilies when appropriate.
 - III. Explore the possibility of occasionally holding worship services with a focus on care for creation.
 - b. With the Education Committee in incorporating creation care into educational opportunities.
 - I. Develop on-going opportunities to learn about the Biblical perspective on creation.
 - II. Support the development/adaptation of Creation information, activities and learning opportunities for use with children and youth.
 - c. With Facilities, Finance and other committees in support of sustainable ecological practices.
 - I. Provide information and resources on greening practices.
 - II. Provide information on “creation conscious” investment strategies.
5. The Caring for Creation committee will develop strategies and programs and identify resources to support members of the congregations in their efforts to care for creation at home and at work.

6. The Caring for Creation Committee will serve as a clearinghouse for information on current issues and for learning and advocacy opportunities and will work with the St. James Outreach Committee in promoting eco-justice and care for creation beyond the walls of the church.

TIMELINE

Because it has been in existence for more than a year and a half, the Caring for Creation Committee has considerable momentum toward the goals of this Initiative. We recommend that in the several months ahead the committee focus on the organizing activities as described above: membership, leadership, structure, communications plan, etc.

We recommend that the committee develop its own time-line for initiating activities in support of the other committees (but encourage them to begin by the Fall of 2015) and for continuation of activities related to supporting members at home and at work and providing information about learning and advocacy opportunities beyond the walls of St. James.

RESPONSIBILITY

It will be the responsibility of the Church Council, as part of the agenda of their regular meetings, to receive reports from the Caring for Creation Committee on their progress toward the goals of this Initiative. In addition, congregational meetings will include Caring for Creation as part of their agendas.

STRENGTHS

CHALLENGES

OPPORTUNITIES

THREATS

THE STRENGTHS OF ST. JAMES

As St. James Lutheran Church plans its future, it has distinct strengths to build on. Among the most obvious of these strengths, are the following:

- St. James is a community of believers in the Lutheran tradition.
 - As a community, we are committed to forms of liturgical worship centered on Word and Sacrament.
 - We welcome all into the community of believers.
 - We embrace an ecumenical approach to serving the spiritual and physical needs of our own members and those of our neighbors. St. James participates in pastoral exchanges, seasonal joint worship services, programs to serve those in need, and shared educational programs.
- St. James is a community of believers who are committed to one another, to the life and vitality of their congregation, and to serving the community outside the walls of their church. The people who make up the congregation of St. James are open, welcoming, accepting, and tolerant. They possess diverse talents and interests which are generously applied to its life and ministry.
- St. James occupies a distinctive building in the heart of Portland. With its fortress-like appearance, this historical edifice is uniquely situated to provide a sanctuary both for its members and for those in the neighborhood who are in need of a place of peace and refuge. The physical plant of St. James exudes daily energy as it is alive with programs and people, young and old, nearly every day.
- St. James is the beneficiary of talented and committed professional and lay leadership.
 - We are served by a gifted Pastor who is committed to a liturgical approach centered on Word and Sacrament, who is an outstanding preacher, and who provides leadership, vision and inspiration to all aspects of the life of the congregation.
 - We benefit from an outstanding music program thanks to the talents, dedication, and creativity of our Minister of Music. Because of her leadership and efforts St. James is known for its musical excellence in its liturgical life and for the unique ministry of Bach Cantatas that reaches many outside our walls.
 - St. James continues to enjoy a succession of committed and engaged lay leaders who give generously of their time and talents to the life and well-being of the congregation.

Opportunities for St. James

As St. James plans for its future, it will look for opportunities to expand its ministries and carry out its mission. Among the potential opportunities to be considered are the following:

- Exploring new ways to communicate to the Portland area community its strengths and identity.
 - A congregation with intellectual and spiritual depth.
 - Its identity as a Reconciling in Christ congregation that welcomes and supports people of all races, cultures, sexual orientations and gender identities.
 - The potential for developing an identity as a Caring for Creation congregation that seeks to incorporate creation care into all aspects of its life and mission.

- Seeking avenues for greater collaboration with our neighboring downtown churches.
 - Identify common concerns and issues which can be addressed together.
 - Find commonality and distinctiveness in our missions and identify potentials for synergy in achieving our missions.

- Establishing a stronger relationship with our neighbor, Portland State University, and look for avenues of ministry to students and faculty there and at other educational institutions in proximity to downtown.
 - Identify and build on existing or previous relationships that have been established with PSU and other institutions.
 - Engage in efforts to identify the spiritual needs of students and faculty that could potentially be met by St. James.
 - Explore the level of commitment that the St. James congregation has to minister to the needs of students and faculty at PSU and other institutions.

- Building more connections with the downtown community and central city that will enhance our ability to carry out our missions in this time and place.
 - Identify the needs for ministry of residents and employees in the downtown community and determine how the concerns, interests, and commitments of St. James can meet those needs.
 - Identify relationships we have with governmental agencies and businesses in the downtown community that can be used to enhance our mission and ministries.

- Seeking additional opportunities to serve the poor and homeless in our immediate community.
 - Develop a profile of who are the homeless and disenfranchised in our immediate neighborhood.
 - Determine how we can better articulate and create an awareness of sustainable ministries for economic justice in our community.

The Challenges facing St. James

As St. James Lutheran Church plans its future, it has distinct challenges. Among the most obvious of these challenges are the following:

- St. James occupies a historic building over 100 years old which requires special consideration and care. If the congregation is to continue to use and preserve the value of this historic facility, meet established city code requirements and maintain safety standards for the congregation's many programs, it will need to address the following issues:
 - Plumbing upgrades, electrical system improvements including lighting and temperature control systems, and kitchen and bathroom modernization.
 - Seismic enhancement.
 - Preservation of historic artifacts including architectural details and the conservation of stained glass windows.
 - ADA handicapped accessibility.
 - Parking and transportation options for commuting parishioners

- St. James, like many religious communities, has an aging membership and recognizes the need to continue to build a more multigenerational congregation. Among the strategies to be considered in accomplishing this are the following:
 - Engaging members of the PSU community and other local educational institutions in congregational activities and programs.
 - Developing and introducing congregational programs to address the needs of central city residents, especially young families.
 - Establishing a presence in local cultural organizations, media and digital social networks.

- St James is currently a small congregation with correspondingly finite financial and staffing resources. It may be overly reliant on dedicated and engaged lay leadership to meet its day-to-day needs. In order to meet the challenges identified in the core planning process it will need to explore options (i.e. funding sources, internships) to support increased staffing for:
 - Outreach.
 - Building maintenance.
 - Support of programs and ministries.

The Threats facing St. James

As St. James Lutheran Church plans for its future, it faces several threats in the external environment. Threats are elements or factors external to the church, the existence of which we do not control but we may need to address as we plan for the future.

Among the most obvious of these threats are the following:

- Occupying an historic building in an earthquake prone area.
- Being located in a city where government is, at best, indifferent to churches, including their contributions to the community and their needs for access on a Sunday morning.
- Being “church” in a secular environment, an environment in which factors that may inhibit or influence our planning include:
 - Public mistrust of institutions, including organized religion.
 - The fact that people have many choices and competing options on Sunday mornings, including communing with nature and outdoor activities, an array of faith-based groups and organized religions, and non-religious community groups.
 - That in the popular culture religion and the word “Christian” are often associated with being intolerant, judgmental, not believable and something to be avoided. Putting it bluntly, religion has a bad reputation in many segments of society, largely because of messages and actions that appear more judgment than grace.
 - A vocabulary used in church that is often unfamiliar and can be threatening to people who have not grown up in the church and for people who did grow up in a church these words may have been used in a manner perceived as unloving or uncaring.
 - City policies, such as events on Sunday mornings, minimal parking for dense dwelling units, and paid parking on Sunday afternoons/evenings, that may have been designed for good urban policy reasons but have had an impact on St James.
 - The view of some that religion is unnecessary, irrelevant, passé, banal, etc.
 - A popular marketplace culture that creates a general impulse leading away from denominational affiliation, with low tolerance for working our problems or issues but focused instead on individual pleasure or satisfaction.
 - A world in turmoil, with religion seemingly at the center of much of the conflict, feeding an anti-religion view.

CONVERSATIONS WITH OUR NEIGHBORS: SUMMARY

Saint James Strategic Planning Core Team

June 10, 2014

During April and May, members of the Core Planning Team leading the strategic planning effort at St. James met with senior pastors at each of four downtown churches. The pastors of the four churches - First Christian Church, First Congregational Church, First United Methodist Church, and St. Stephen's Episcopal Church - were selected for conversation because of their church's proximity to St. James and the downtown blocks of Portland and because of their affinity with St. James historically and through reciprocal fellowship declarations of the national church bodies. Our purpose was to help us understand how St. James is viewed by its neighbors; what they perceive as the trends, challenges, and unmet needs in the community we share; and how, if at all, they see the downtown churches working more closely in ministering to the needs of our community.

Impressions. It is probably not surprising that the nearer the neighbor, the more clear the impressions of St. James are likely to be. Our more distant neighbors shared with us that they had little knowledge or impression of the congregation and its ministries. One said he had no knowledge of our outreach ministries.

It also was not surprising to learn that all four ministers have a very favorable view of St. James based on their interactions and relationship with our Pastor Andersen who is respected for being collegial, hospitable, and a faithful representative of our congregation in the community. We are seen as "high church" Lutherans who dumb down neither liturgy nor message and who host an excellent music program, exemplified by the Bach cantatas, that is offered for the benefit of the entire community. Because we sponsor a preschool and provide low-cost housing through the St. James Apartments, we are seen by our nearest neighbors as committed to serving important needs of our immediate community.

To the extent that they had an impression, our neighbors see our members as hospitable and friendly, if not overly outgoing. Our members were described by one of the pastors as being a mix of wealthy and street people, and anchored by an older guard. To the extent they have interacted with our staff, either in the front office or the CDC, our neighbors describe them as friendly and welcoming. Several mentioned the positive contributions of Christine Doidge during her time at St. James.

Trends. All mentioned continuing or increasing homelessness when asked about trends. Beyond that, there did not seem to be a consensus among these four pastors about major trends they are seeing in downtown Portland and the broader community. But each had very important insights that may be useful to our strategic planning effort as we try to understand what is going on in our community.

One of our neighbors talked about the trend in downtown Portland of being increasingly populated by young professionals and by highly educated relatively wealthy retired

professionals. The trend is not toward young marrieds with young children in our neighborhood. On a variation of this theme, another pointed out the increasing economic bipolarity of our community made up of the quite wealthy on one hand and the quite needy on the other. The trend of economic development where every square foot of green space is being developed raises concerns for quality of life, stewardship of community resources, and equal access to those resources.

One of the pastors observed that while Portland may be the most secular city in America skepticism about the role of religion in society may be fading.

Challenges. There is unanimity among our neighbors that homelessness is the most serious challenge facing downtown Portland. One of the pastors said: “The most serious challenge is to meet the needs of those in our midst who are homeless and suffering from addiction and mental health issues.” Another said: “The homeless situation in downtown Portland is one of the greatest challenges facing the city.”

Other challenges that were cited include parking; preservation of our historic buildings; cultivating a presence within the business community; integrating PSU into the life of the churches or integrating the churches into the life of PSU; and providing ministries that meet the needs of young professionals and retirees along with the students who are mixed in.

Unmet needs. All our neighbors agree that the most serious unmet need in downtown Portland is to provide meaningful and effective programs that will help the homeless get off the street and address attendant problems of mental illness and addiction. They need help in developing life skills that will enable them to sustain productive and satisfying lifestyles.

The need for ministries and programs tailored for the people who live in the neighborhood (young professionals and the retired) was among the other needs identified in the course of our conversations. The immigrant population in Portland, including the undocumented, have many needs that are not being met. Our congregations need to embrace a Biblically-based approach, such as Care for the Earth (FUMC), to addressing issues of sustainability and livability in our community.

Working together. While all of the pastors seemed to think that it would be a good idea to work together on meeting these needs, it was our closest neighbors who expressed the hope for achieving real synergy in social ministries through collaboration. A suggested strategy for doing this was for each of the congregations to use their strengths in coordination with the neighboring congregations to complement one another’s ministries. One of the neighboring pastors talked about each of the congregations finding its niche in downtown and funneling people to the church location where their needs can best be met. The churches need to get together and decide which church will fill which niche, e.g. homeless shelter, feeding, mental health, low income housing, etc. Another pastor said, “What if we co-sponsored a day-center for people in need? One congregation could do the AA program, another Narcotics Anonymous,

and another meals for the homeless. The point is to coordinate, not duplicate, our efforts.” She suggested that it would be a positive step to establish a joint social ministries committee.

In the course of these conversations, we learned that several of our neighbors have very well developed and established programs for serving the needs of the homeless, the hungry, and the needy. So if the downtown churches are to agree to work more closely together there are opportunities to support social ministries already in place. For example, First United Methodist has, for some time, hosted a shelter for homeless families with the participation and support of other downtown churches. And at St. Stephens, where some 80,000 meals were served last year, we learned about an array of at least eight programs they host or sponsor, many in partnership with other agencies. At the very least, it would seem prudent to support and coordinate with these and other existing ministries as we move forward with joint commitments to social ministry.

According to these pastors, opportunities for greater collaboration exist in the areas of worship, education, and communication. The joint midweek Advent and Lenten services were cited as a positive starting point. Because of similar traditions and liturgical practice our Episcopalian neighbors would be especially interested in exploring greater collaboration in worship, perhaps even considering joint midweek services.

In the view of some, education programs at all of our congregations could be greatly strengthened by working together. There was a time when the downtown churches were looked to as the source of education and dialog about the weighty issues of the time. Through greater collaboration, the congregations could provide opportunities for their members, and the larger community, to learn about pressing issues as a basis for acting together. Would it be possible for the neighboring churches to coordinate their Sunday morning activities so that there could be a common hour for education?

While some of our neighbors support paid staff members to facilitate communication internally and with the media and community, none of these pastors felt their congregation had been entirely successful in communicating who they are and what they stand for to the larger community. One pastor suggested that the downtown churches need to come together to develop a strategy for a common approach to building relationships with city agencies. Another suggested that our communication to the media and public would be more effective if we had a joint approach to meeting the needs of those within our neighborhood.

Opportunities and barriers. These pastors agreed that it is definitely possible for downtown congregations to work more closely together. While they were unsure of how St. James would state its mission, there seemed to be agreement that the difference between their church’s mission and that of St. James and the other downtown congregations is so small as to be insignificant. We share the same basic values, but live them out in different ways.

The fact that these pastors all expressed an openness to greater collaboration, provides an opening to do even more together. The pastors meet on a regular basis and have positive

collegial relationships. One of the pastors emphatically expressed a willingness to meet anytime, anyplace to explore increased collaboration among the downtown congregations. Following the example of the relationship among the pastors we will need to build connections among our members. It was suggested that the congregations work toward a point where social ministries and education (two examples) would be carried out by joint committees of the three Park Blocks churches.

A potential barrier to greater collaboration among the churches, cited by several of our neighbors is not having sufficient trust among the clergy and the membership to mount really meaningful efforts at joint ministry. Several suggestions for building trust included a focus on communication. Pastors meeting with lay leaders from neighboring congregations would build trust. Closely related to trust are issues of fear (will we lose what is most important to us?) and ego (who will get credit?) One pastor suggested that if we are really serious about collaboration and avoiding these barriers it would be helpful to have an outside resource person, perhaps from EMO, facilitate trust-building meetings with clergy and lay leaders from the participating congregations.

Outreach to PSU. In each of our conversations we asked about outreach to replace the now defunct Campus Ministry at Portland State University. Every one of these pastors expressed disappointment and dismay that there is not a visible and unified presence of the mainline Protestant churches at PSU. But no one was able to offer a grand strategy to remedy that situation. Each of the congregations has some connection with PSU, uncoordinated efforts that one person called tinkering around the edges. These connections include providing a limited number of internships, hosting a music program, and maintaining various personal connections between the pastor and/or members of the congregation with individual professors, students, and administrators at the university. One pastor characterized the problem: “We (the downtown churches) have not clearly defined who we are and communicated who we are for this audience (of students).”

All seemed to agree that if there is going to be a progressive Protestant ministry on campus it will necessarily involve a collaborative effort and leadership from the downtown churches.

Encouragement for St. James. All of the pastors commended St. James for undertaking this task of planning for the future. As we complete our planning, we are encouraged to continue the good things that St. James is currently doing, e.g. honoring a rich liturgical tradition, offering quality music programs, the Child Development Center, providing affordable housing, etc. We were reminded that unless our members feel heard in this planning process they won't buy into the plan. It was also suggested that St. James can play a leadership role in bringing the downtown churches together for greater collaboration in social ministries and in joint worship and education activities.

St. James Lutheran Church: Who We Are

A Report from the Core Planning Team (CPT)

September, 2014

Founded in 1891, St. James Lutheran Church, in downtown Portland, has been a congregation associated with a number of firsts. St. James was one of the first Lutheran churches in Portland. It was Portland's first English-speaking Lutheran church. More recently, in 1991 St. James, continuing a history of advocacy in social issues, became Oregon's first Reconciling in Christ congregation articulating welcome and inclusion to gay, lesbian, bisexual and transgender persons. Following that tradition of leadership and concern for social issues, St. James today is working toward an emerging identity as a Caring for Creation congregation.

Since its founding, St. James has consistently confessed the Gospel, recorded in Holy Scripture and confessed in the ecumenical creeds and Lutheran confessions as the power of God to create and sustain the Church for God's mission in the world. On its website, St. James currently proclaims its mission to be "to share God's inclusive and eternal love with everyone." Today, St. James continues to worship in a classical Lutheran style, sharing Holy Communion on a weekly basis. Through our inquiry we have found that our members greatly appreciate the current quality of both the preaching and music ministry that are part of the worship experience at St. James.

St. James occupies a sanctuary and chapel that were constructed in the late 19th and early 20th centuries and placed on the National Register of Historic Sites in 1975. While this beautiful, historic structure adds to the appeal and identity of St. James, it also brings substantial challenges and costs. In the years ahead, the congregation will need to address the ongoing need for upgrades to its infrastructure, preservation of historic artifacts, and improvements in accessibility.

OUR MEMBERS

Like many urban congregations in America, St. James has experienced an overall decline in membership since the mid-twentieth century, reflecting a general shift in populations from the urban core to suburban communities. In recent years, St. James has been experiencing a modest reversal to this trend. At the beginning of this study in 2013, St. James counted 111 households and slightly over 200 individuals among its members. In the past two years, St. James received at least 42 new members, an increase of approximately twenty percent. Our research tells us that a sense of welcome and hospitality has been an important attraction for new members and for those continuing as members over a longer period of time.

The majority of our members (71%) live in Portland, with almost a third living in suburban communities. Only one in five members live in the downtown core, meaning that St. James is a destination church for the majority of our members. This pattern continues among our newest members with about one-third living downtown and the rest commuting from more distant neighborhoods or the suburbs.

While we have frequently heard that St. James is an aging congregation, our analysis shows this to be not necessarily so. Average age for our members is 42, and fully half of our members are under the age of 57 – the median age of the congregation. Thirteen percent of our members are under the age of twenty, and 1 in 5 is over 70. Our newest members tend to be somewhat younger, with their median age being approximately 44.

While members of St. James come from many varied backgrounds, circumstances, professions, and interests, we are not very ethnically and racially diverse.

OUR MINISTRIES AND PROGRAMS

For a congregation its size, St. James offers a surprising number of ministries and programs. These reflect the faith, talents, and creativity of its members and staff and flow from their strong desire to communicate the love and blessings they have received from God. At the core are worship and music ministries which include weekly Sunday and midweek Eucharist services, and joint worship services during Advent and Lent with our neighboring churches. The excellence of our music ministries is not only on display during weekly regular worship, but also through the on-going series of Bach Cantata vespers, monthly jazz vespers, and a number of concerts and performances offered or sponsored by St. James.

Our education ministries for children and youth include weekly Sunday school as well as instruction for confirmation offered in collaboration with another Lutheran congregation. For adults we offer opportunities on many Sundays, after service, to explore and learn about topics of interest and concern through Open Space sessions and the Let the Light Shine series. Midweek, after the noon Eucharist service, a small group generally gathers for Bible or book study. In the past, St. James has sponsored a lecture series. At the present time, we do not offer instruction for adults who are interested in the Lutheran tradition and confessions, nor do we have Bible study on Sunday mornings or at another time that is accessible to adults who work or keep busy schedules throughout the week.

One of our most visible commitments to presence and ministry in downtown Portland is through the St. James Apartments which offer affordable housing to those in need. Similarly, our sponsorship of the Child Development Center, the first such facility in downtown, is a service to the community that offers high quality day care and preschool education to families in our neighborhood.

We have a fairly large number of social ministries, which often come out of and reflect the commitments of individual members. Our social ministries include providing volunteers who once a month provide meals and serve as overnight hosts at the Goose Hollow Family Shelter and supplying produce to food banks from our community garden at Fulton Street. The women of St. James, through WELCA, provides funds and services to those in need in our community and elsewhere. In addition, we have other social ministries that are more sporadic and seasonal

such as the Boxcar initiative, alternative Christmas, Community Thanksgiving, and others. We also support and participate in church-wide and ecumenical ministries through support of Lutheran World Relief, the ELCA, and the Oregon Synod. Historically, St. James has been faithful in its contributions to the Synod at one of the highest per capita levels.

As the CPT reviewed the congregations programs and ministries, it became clear to us that current staffing patterns are inadequate. The Congregation will need to grow the number of volunteer participants and leaders, as well as provide adequate staff support, if we are to be open to additional opportunities for ministry in our immediate community and citywide. We do not currently have sufficient staff for basic office work (e.g. preparation of Sunday ministry books, bulletins, etc.), for website and publications, and for janitorial and maintenance activities. Continuing to rely on volunteers in so many of these areas is not a sustainable strategy. In the near term the Church Council and the Congregation will need to come to terms with matching its resources (both money and people) with its expectations for programs and ministries. Or to put it more succinctly, St James needs to consider how to reconcile its ministries and programs with its resources – do we provide the staff resources we need or do we reduce the number of ministries and programs?

OUR FINANCES

Support for the ministries and programs at St. James comes from two sources: from the contributions of its members and from income derived from the operation of the St. James Apartments and the St. James Child Development Center. For the 2014 operating budget, the total amount of income is projected to be \$326,534. Of that total, \$176,231 or 54% is expected to come from member contributions. The remaining 46% (\$147,813) is to come from the apartments and CDC income.

Our analysis of the financial picture at St. James included a study of giving patterns by the members of St. James. We focused on the 2013 budget year in which member contributions totaled \$163,674. The data we used came from the church's bookkeeper and showed annual contributions (without member identity) for each of 111 households with envelopes assigned to them. Contributions by envelope in 2013 totaled \$148,478. Out of 111 households, only 69 made a contribution with their assigned envelope. Forty-two households, representing 38% of the total, did not contribute using their assigned envelope.

Of the \$148,478 in contributions through envelopes, \$103,507 - more than two thirds - came from only 17 households. In other words, 15% of our households were responsible for 70% of the contributions by envelope and 63% of the total of all contributions. About 80% of the total given by envelope, \$118,471, was given to fulfill a pledge. Non-envelope offerings in 2012 totaled \$10,827.

From our study of giving patterns, it seems clear if St. James is to enhance and expand its ministries then we must make every effort to increase the number of households that actually

pledge and contribution and to increase member contributions as a percent of budget income. We believe that a continued emphasis on stewardship, including education about the meaning of responsive giving, will be important to our future.

After member contributions, the remaining 46% of budgeted income is derived from operation of the St. James Apartments and the CDC. The apartment complex, first developed with a combination of public and private monies in the mid-1990's, came into complete congregational ownership in 2011 and is managed by GSL Property Management, with a board of directors as liaison to the congregation; annual income is projected to increase substantially in a little more than a decade, when outstanding mortgage balances are paid off.

The Child Development Center operates a tight annual budget and is subject to fluctuations in enrollment (related to local employment and economic statistics). It occupies roughly 2/3 of the square footage of the church building (excluding the sanctuary): the basement fellowship hall and kitchen, classrooms and assembly room, as well as the entire second floor of the 1956 office wing. The infant care center occupies more than 1/3 of the ground floor space of the St. James Apartments.

The Church Council and congregation have created other financial holdings over a period of years to meet special situation and provide support for designated ministries and for general endowment purposes. These include designated funds which are reported to the Council monthly along with operating monies; special funds, income and expenses from which are reported quarterly and managed by the Endowment Committee and Bill Hamman; and the St. James Endowment Fund, managed by a congregationally elected Endowment Committee. Within the Endowment Fund are a few specially designated funds. Interest income from undesignated general Endowment monies is made available annually for congregational use to support special program needs or extraordinary circumstances unforeseen in the general fund budget.

In our analysis and discussion several issues and questions have emerged related to these financial holdings. The array of designated and special funds seems quite complex. Should there be a process for consolidating and/or sun-setting some of these funds, especially those that seem to have been dormant for a period of time? Is there a way to make the use of these funds, intentionally budget relieving (or enhancing, in the case of expanded ministries)? Related to the St. James endowment, the CPT wondered about the formula - using cash value rather than the market value of the funds - that is being used in current practice to determine annual amounts available for funding. Is this approach consistent with the guidelines in the Endowment's Articles of Incorporation? And here, too, is there a way to make expenditures from the endowment in ways that are budget relieving or enhancing?

HOW WE MAKE DECISIONS

The decision-making process at St. James is governed by and subject to the congregation's adopted Constitution and Bylaws (2012). The final authority for decisions rests with the

congregation as exercised through the Congregational meeting. The constitution delegates to the Congregational Council – often referred to as Church Council – the general oversight of the life and activities of the congregation. The members of the Council are elected by the congregation at the annual meeting.

In current practice, St. James holds only one meeting of the congregation per year, the Annual Congregational Meeting which is held in January as required by the bylaws. At this meeting, the assembly hears reports from committees and officers, adopts a budget for the year, and elects members of the Congregational Council. However, the by-laws provide for the possibility of a second meeting, for the purposes of congregational planning, to be held in the Spring, and a third meeting, for presentation of the budget and proposed programming, be held in the Fall. The CPT believes there would be great merit in following this pattern of congregation meetings. We are hopeful that our recommendations for strategic planning will be ready for presentation at a Congregational Meeting in Spring, 2015.

St. James utilizes a committee structure to gain involvement and input from the congregation as a whole. A limited number of committees are required by the constitution which also delegates to the Council the authority to establish additional committees. Duties of the committees are to be specified in the bylaws or by continuing resolution. The CPT believes the bylaws, and the functioning of the Council and committees, could benefit from an updated and clearer description of the committee structure with an organizational chart depicting the flow of responsibilities and accountability among the committees and to the Council and Congregation.

In current practice, it appears that committees are populated based on individual interests or by invitation from the committee chair, Pastor or other members. It also appears that some committees seldom or never meet and do not report to the Council on a regular basis. We believe the effectiveness of committees would be greatly enhanced if the bylaws provided a description of the goals and duties of each functioning committee. We also believe that the bylaws should provide for committee accountability by requiring regularly scheduled meetings, regular reports to the Congregational Council, and regular communications about committee actions to the congregation as a whole. We recommend that adhoc committees be formed for specific purposes for a specified timeline by action of the Council. We also recommend that the Council undertake a review annually of all committees to determine their applicability to current congregational needs.

St. James Lutheran Church: Where We Are

A Report from the Core Planning Team (CPT)

October, 2014

DOWNTOWN PORTLAND

Where we are is in the Park Blocks of downtown Portland, situated in the center of a major metropolitan area. According to the 2010 census, 1,976,846 persons resided within twenty miles of St. James. That number represents an increase of 302,220 persons or 18% since 2000. Population within the greater Portland area is expected to increase by more than 115,000 persons or 5.8% over the next five years.¹

In our inquiry related to population and demographics we found the downtown area to be of special interest in thinking about the future of St. James. In 2010, 35,373 persons resided within a mile radius of the church. That was an increase of 39% or nearly 10,000 since the year 2000. And the area where St. James is located is expected to continue to experience population growth that will be among the highest in the metro area: within a one-mile radius it is expected to increase by 9.5% or 3,376 additional persons.² That translates into an increase of more than 2,000 additional households in the next five years.

The population within a mile of the church is overwhelmingly white. In 2010, 78.1% of residents identified themselves as white; 5.8% as Hispanic, 3.9% as Black, and 12.2% as Asian or other. Projections do not foresee a great shift in the racial/ethnic makeup in the near future. The average age of residents is 44.1 years, slighter older than St. James's average of 42, and is expected to increase to 46.2 in the next five years.

The average household income of those living within a mile of St. James is \$49,384 with a median of \$32,895. Almost half the households have incomes of less than \$25,000³ while 12.4% of them reported annual income of \$100,000 or more. At the same time, the overall education level of those living in the downtown area is very high. While 93.1% of adults aged 25 and over have graduated from high school, compared to the national average of 85.1%, college graduates account for 56.6% of those over 25 versus 27.8% for the U.S. overall. More than 4,700 individuals, or 13.4%, reported themselves to be currently enrolled in college.

Of those living in downtown, 20,387 report themselves to be employed. Not surprisingly, the majority are employed in white collar jobs. Those who reported they were unemployed numbered 3,261 while 11,606 reported that they were not in the labor force. The vast majority of downtown residents live in rental properties; only 20.6% live in owner occupied properties. Nearly 60% live in structures comprised of 50 or more units. The median value of owner occupied properties was \$427,399. Nearly ten percent of owner occupied properties were worth more than \$1,000,000.

¹ The source for these data is the U.S. Census Bureau as compiled by the Percept Group, Inc.

² The U.S. population is projected to grow by 3.9% in that same time period.

³ The poverty level for a family of 4 in 2010 was \$23,050.

In addition to data from the 2012 U.S. census, we also considered survey and marketing data supplied to us by the Percept Group.⁴ Among the most interesting findings from those sources is that 99% of households in downtown Portland fall within three broad “lifestyle” categories.

Young Singles and Couples is the first of these categories. Households within this segment are mostly without children and made up of younger adults who are in the early stages of their careers. Nearly half the downtown households (49.4%) are within this segment of the population. The Young Singles and Couples lifestyle category has been divided into four subgroups:

University life. This subgroup is made up of young adults, primarily 18 – 24 year olds, who are still pursuing a higher education degree. In downtown Portland, 9.4% of households meet the definition of this subgroup.

Educated new starters, a second subgroup, make up 19.4% of downtown households. These households are made up of individuals who are in the very first stages of their careers. They are only slightly above average in income and are twice the national average for graduate degrees.

Rising multi-ethnic urbanites is the name that has been given to the third subgroup of young singles and couples. These households, 18.8% of those in downtown Portland, feature a high number of 25 – 29 year olds, a high number of single person households, and a high number of adult working women without children. Household incomes within this subgroup are below average, but individual incomes are significantly above.

Rising potential professionals. This fourth subgroup, only 1.4% of the downtown population, is typically made up of two-person households. Both the median income and per capita income are considerably higher than the national average. Employment is predominantly white collar, especially in areas of professional specialties.

Young Singles and Couples, across all subgroups, share a common set of concerns as reported in survey data.⁵ These concerns include:

- Satisfying companionship and fulfilling marriage
- Satisfying job and career
- Life directions
- Social injustice
- Racial and ethnic prejudice
- The environmental crisis
- Care for aging parents
- Neighborhood crime and safety

With the exception of the Rising Professionals, the faith involvement and professed belief in God among Young Singles and Couples is lower than the national average. They generally offer strong financial

⁴ We commissioned a “Ministry Area Profile” tailored for St. James from the Percept Group, an organization specializing in providing churches with demographic information integrated with data about religious attitudes, preferences, and behavior of the American people.

⁵ The Ethos Survey was developed by the Percept Group and administered to a large national sample. Results are extrapolated to the population segments in our study area.

support for charities, but significantly less than average for religious organizations. When asked to identify programs and characteristics they would prefer in a church, the following are among the most frequent responses:

- Cultural programs (art, music, drama)
- Theological discussion groups
- Sports/camping programs
- Spiritual retreats
- Intellectual worship
- Community focused mission
- 12-step programs
- Global missions focus
- Marriage enrichment programs

Struggling Urban Life is the name given to the second largest segment (46.0%) of downtown households. This segment of the population typically has concentrations of individuals in the 18 to 29 years old range, as well as persons 70 and over. It ranks first in the number of single person households and divorcees. Half of these households earn \$15,000 or less, and nearly one-third of the adults do not have a high school diploma. They occupy the oldest and least modern buildings in our community. The primary concerns of this group include:

- Divorce
- Companionship
- Affordable housing
- Neighborhood gangs
- Social injustice
- Adequate food

Within the Struggling Urban Life segment strong faith involvement or a belief in God are below the national average, and a higher percentage than the norm believe the U.S. must open its doors to all people. Asked to identify programs and characteristics they would prefer in a church, these households are more likely to choose:

- Care for the terminally ill
- Cultural programs
- Active programs for the retired
- Music performed by others
- Somber/serious architecture
- Traditional/formal worship

Affluent Families, the third segment of the downtown population, although less than 5%, is made up of a small group of approximately 900 affluent family households in downtown Portland. More than half of this segment is made up of “educated and affluent midlife families.” These households are above average in median age, household income and value of property, college education, married individuals and working female adults. Faith involvement and belief in God among this subgroup is well below average.

A little more than a quarter of the Affluent Families segment is made up of “traditional affluent families,” households representing the wealthiest households in America with median income more than three times the national average. This group ranks highest in home ownership, property value, education levels, and number of adults age 40 to 64. Faith involvement is near the national average, though belief in God and belief that God is actively involved in the world are substantially below the national average.

Approximately ten percent of the Affluent Families fit the definition for the “affluent educated urbanites” subgroup. These households enjoy a per capita income nearly three times the national average and rank first in number of professional specialists, such as doctors and lawyers. Faith involvement, belief in God, and contributions to religious organizations are among the lowest in the nation.

Individuals within the Affluent Families segment share a number of concerns. Among these are the following:

- Companionship
- Affordable housing and social injustice
- Alcohol/drug abuse
- Finding life direction
- Racial/ethnic prejudice
- Time for recreation/leisure
- Long-term financial security
- Good schools

When asked to identify programs and characteristics they would prefer in a church, Affluent Families households are likely to choose:

- Traditional formal worship as well as intellectual worship
- Traditional music
- Marriage enrichment opportunities
- Divorce recovery programs
- Cultural programs
- Adult theological discussion groups
- Spiritual retreats

PORTLAND STATE UNIVERSITY

Where we are is next door to Portland State University, the largest university in Oregon with 29,700 students.⁶ It is a downtown school that is part of Portland’s landscape and culture. The average student age is 28 - 29. Three thousand students live on campus in student housing. Of these, 25% are

⁶ Our source for information about PSU was Gregory King, an advisor in the Student Activities and Leadership Programs office, who met with the CPT on September 6, 2014.

international students. The international population is largely made up of students from Saudi Arabia, China, Brazil, and India. International students make up 7.7% of the general population of PSU.

With only 3,000 students living in student housing, PSU is still primarily a “commuter” campus. While a significant number live in private housing near campus, many students commute from outer Portland and surrounding suburban areas. PSU has been described as a top heavy campus, meaning that the number of students who are underclassmen is much smaller than those who are juniors (17.8%), seniors (33.5%), and grad students (22%).

PSU has experienced significant growth over the past decade while nationwide there has been a 2% drop in college attendance. PSU students have the highest need for financial aid in Oregon. PSU’s mission is to serve the city.

The activities of faith-based groups on campus are coordinated by the Spirituality Committee, which is co-chaired by Greg King. There are two types of faith-based groups on campus. One type is completely student led and funded by the university through student activity fees. The other type is made up of “affiliate groups” that typically have a chapter on campus. The Spirituality Committee meets once each quarter. Its membership is comprised of representatives from the spiritual groups on campus as well as representatives of churches and other spiritual groups from the surrounding community. The meetings of the Spirituality Committee are meant to facilitate communication among the campus groups, administration, and churches and other faith-based groups from the surrounding community. The goal is to help create a support system for students who need or wish to seek spiritual guidance. Students do not want to be proselytized. They often need healing from some past hurt or trauma in a spiritual context. Sometime they are seeking a powerful reconnection to a spiritual life.

In our meeting with Greg King, it became obvious that there are opportunities for St. James to become involved and provide ministry to PSU students. It should be noted that there are currently no progressive mainstream Christian groups active on campus. At the very least, St. James should have a representative on the Spirituality Committee. Until a staff position is created with responsibility for outreach to PSU, the CPT will recommend the establishment of an active Outreach Committee at St. James that will be responsible for providing a representative to the PSU Spirituality Committee on a consistent basis and for coordinating our ministry to the PSU campus.

DOWNTOWN CHURCH NEIGHBORS

Where we are is in proximity to Christian churches in downtown Portland who share our concern for providing ministry and service to our community. During the Spring of 2014, we had conversations with senior pastors at four of these downtown churches: First Christian Church, First Congregational Church, First United Methodist Church, and St. Stephen’s Episcopal Church. These four churches were selected because they are our neighbors and because they are friends with St. James historically and through reciprocal fellowship declarations of the national church bodies. Through these conversation we hoped to gain understanding of not only of how St. James is viewed by its neighbors, but also what they perceive as the trends, challenges, and unmet needs in the community we share⁷; and how, if at all, they see the downtown churches working more closely in ministering to the needs of our community.

⁷ For a summary of these pastors’ impressions of St. James, see the St. James Newsletter of July 2014.

Trends. The one trend that all agreed on was the continuing and increasing homelessness that is visible in our neighborhood. There did not seem to be a consensus beyond that about major trends in downtown Portland and the broader community but a number of very important insights emerged from these conversations that are useful in understanding where we are.

One of those insights is that downtown Portland is being increasingly populated by young professionals and by highly educated relatively wealthy retired professionals. The trend is not toward young marrieds with young children in our neighborhood. On a variation of this theme, there is an increasing economic bi-polarity of our community: made up of the quite wealthy on one hand and the quite needy on the other, an insight that is supported by the census data. The trend of economic development where every square foot of green space is being developed raises concerns for quality of life, stewardship of community resources, and equal access to those resources.

Challenges. There is unanimity among our neighbors that homelessness is the most serious challenge facing downtown Portland as one of them put it: “The most serious challenge is to meet the needs of those in our midst who are homeless and suffering from addiction and mental health issues.” Another said: “The homeless situation in downtown Portland is one of the greatest challenges facing the city.”

Other challenges that were cited include parking; preservation of our historic buildings; cultivating a presence within the business community; integrating PSU into the life of the churches or integrating the churches into the life of PSU; and providing ministries that meet the needs of young professionals and retirees along with the students who are mixed in.

Unmet needs. All our neighbors agree that the most serious unmet need in downtown Portland is the need for meaningful and effective programs that will help the homeless get off the street and address attendant problems of mental illness and addiction. They need help in developing life skills that will enable them to sustain productive and satisfying lifestyles.

The need for ministries and programs tailored for the people who live in the neighborhood (young professionals and the retired) was among the other needs identified in the course of our conversations. The immigrant population in Portland, including the undocumented, have many needs that are not being met. Our congregations need to embrace a Biblically-based approach, such as Care for the Earth (FUMC), in addressing issues of sustainability and livability in our community.

Working together. All of the pastors seemed to think that it would be a good idea to work together. Our closest neighbors expressed the hope for achieving real synergy in social ministries through collaboration. A suggested strategy for doing this was for each of the congregations to use their strengths in coordination with the neighboring congregations to complement one another’s ministries. One of the neighboring pastors talked about each of the congregations finding its niche in downtown and funneling people to the church location where their needs can best be met. The churches need to get together and decide which church will fill which niche, e.g. homeless shelter, feeding, mental health, low income housing, etc. Another pastor said, “What if we co-sponsored a day-center for people in need? One congregation could do the AA program, another Narcotics Anonymous, and another meals for the homeless. The point is to coordinate, not duplicate, our efforts.” She suggested that it would be a positive step to establish a joint social ministries committee.

In the course of these conversations, we learned that several of our neighbors have very well developed and established programs for serving the needs of the homeless, the hungry, and the needy. So if the

downtown churches agree to work more closely together there are opportunities to support social ministries already in place. For example, First United Methodist has, for some time, hosted a shelter for homeless families with the participation and support of other downtown churches including St. James. And at St. Stephens, where some 80,000 meals were served last year, we learned about an array of at least eight programs they host or sponsor, many in partnership with other agencies. At the very least, it would seem prudent to support and coordinate with these and other existing ministries as we move forward with joint commitments to social ministry.

According to these pastors, opportunities for greater collaboration also exist in the areas of worship, education, and communication. The joint midweek Advent and Lenten services were cited as a positive starting point. Because of similar traditions and liturgical practice our Episcopalian neighbors would be especially interested in exploring greater collaboration in worship, perhaps even considering joint midweek services.

In the view of some, education programs at all of our congregations could be greatly strengthened by working together. There was a time when the downtown churches were looked to as the source of education and dialog about the weighty issues of the time. Through greater collaboration, the congregations could provide opportunities for their members, and the larger community, to learn about pressing issues as a basis for acting together. Would it be possible for the neighboring churches to coordinate their Sunday morning activities so that there could be a common hour for education?

Opportunities and barriers. These pastors agreed that it is definitely possible for downtown congregations to work more closely together; the difference between their church's mission and that of St. James and the other downtown congregations is so small as to be insignificant. We share the same basic values, but live them out in different ways.

The fact that these pastors all expressed an openness to greater collaboration, provides an opening to do even more together. The pastors meet on a semi-regular basis and have positive collegial relationships. One of the pastors emphatically expressed a willingness to meet anytime, anyplace to explore increased collaboration among the downtown congregations. As a next step, the congregations will need to undertake activities to build connections among our members. It was suggested that the congregations work toward a point where social ministries and education (two examples) would be carried out by joint committees of the three Park Blocks churches.

A potential barrier to greater collaboration among the churches is not having sufficient trust to mount really meaningful efforts at joint ministry. Several suggestions for building trust included a focus on communication. Pastors meeting with lay leaders from neighboring congregations would build trust. Closely related to trust are issues of fear (will we lose what is most important to us?) and ownership (who will get credit?)

RESULTS OF MEMBER SURVEY

October 19 and 26, 2014

N = 62

		Strongly disagree	Disagree	Don't know/ Neutral	Agree	Strongly agree
1.	I experience St. James as a welcoming and hospitable community.	2	1	1	24	34
2.	I feel there is opportunity for my voice to be heard when important decisions are made at St. James.	1	2	14	28	17
3.	The quality of the preaching and music ministries keeps me coming back to St. James.	2	1	5	12	42
4.	Upgrading the infrastructure of the St. James physical plant should be a high priority in the next several years.	1		10	32	19
5.	St. James has been effective in informing the community that it is a Reconciling in Christ congregation welcoming gay, lesbian, bisexual and transgender persons.	1	4	23	23	11
6.	The current level of education offerings for adults at St. James is adequate to meet the needs of its members.	1	19	21	18	3
7.	St. James should find ways to minister to the needs of students at Portland State University.		4	19	30	9
8.	The existing level of staffing is adequate to support the ministries of St. James.	19	24	15	4	
9.	Contributing financially in support of its ministries is an important part of being a member of St. James.	2		3	29	28
10.	St. James's identity as a Reconciling in Christ congregation is of high importance to me as a member of the congregation.	1	1	8	27	25
11.	I would be happy to see more collaboration in social ministries between St. James and our neighbor congregations.	1		9	37	15
12.	I have a clear understanding of how finances are managed at St. James.		8	19	31	4
13.	The St. James Endowment Fund has been effective in enhancing the ministries of St. James.		1	21	28	12
14.	It is important for St. James to become a Caring for Creation congregation.	1	3	12	28	18
15.	For me, stewardship is about my response to God's blessings, grace and mercy.		1	1	36	24
16.	I think it would be beneficial for St. James to have more than one congregational meeting each year.	2	3	23	24	10