

Our Association WG



Independent Affiliate Status

(Excerpts from letter sent to Independent Affiliates in February, 2006)

“As part of a comprehensive and ongoing examination of the purposes and mission of our Association, the UUA Board of Trustees has reflected on the purpose, positioning and potential of Independent Affiliate status. This decade long conversation about Independent Affiliates has supported a growing sense of focus and clarity about how relationships with and between congregations and affiliate organizations shape Unitarian Universalism.”

“The UUA Board of Trustees is redefining the criteria for the status of Independent Affiliate. The Board understands that the health and vitality of our congregations form the foundation of our Association and that our congregations are not served by Independent Affiliates operating in isolation or serving as an alternative for congregational life.”

“These new criteria also grow out of a realization that advocacy and interest groups are more effective agents of change when they work strategically and collaboratively. Without this intentional alignment of focus of effort we are a collective of liberal ideologies and theologies without a coherent message. If we do not exercise an ability to prioritize and wisely utilize resources, we do not provide a viable or realistic alternative to other religious and political options.”

“Independent Affiliate status is just one way to be in relationship with our association of congregations. Organizations that do not meet the new criteria may choose to explore new ways of engaging directly with our congregations and districts. Some organizations may wish to partner with other groups to create entities or councils that do meet the new criteria.”

RULES Pertaining to Independent Affiliate Organizations

SECTION C-3.8. Independent Affiliate Organizations.

Rule 3.8.1. Application for Independent Affiliate Status.

Each applicant for independent affiliate status shall submit with its application:

- a an attested copy of its charter, and, unless it is included in the charter, an attested copy of its purposes, objectives, and bylaws;
- b the number of members or member groups in the organization;
- c a list of the principal officers with their personal mail addresses, congregation membership or congregation where settled if the officer is a fellowshipped minister serving a Unitarian Universalist congregation, and the principal mail address of the organization;
- d the contribution contemplated by Rule 3.8.9;
- e a financial statement showing income and expenses for the latest fiscal year

- preceding the date of filing and showing assets, liabilities and net worth as of the end of such fiscal year;
- f the dates upon which its governing board met during the twelve months immediately preceding the date of filing;
 - g any yearly reports of its governing body and its principal officers sent to members during the twelve months immediately preceding the date of filing;
 - h evidence that it enjoys tax exempt status:
 - 1 under Section 501(c)(3) of the U.S. Internal Revenue Code of 1954;
 - 2 as a registered charity as provided for in the Income Tax Act (Canada); or
 - 3 under the laws of the country governing the applicant's tax status;
 - i if the applicant does not enjoy tax exempt status, the reason or reasons it does not;
 - j a statement outlining how its purpose, mission and structure models interdependence through engagement, coordination or collaboration of effort and resources; and
 - k a statement outlining how the organization supports the transformation of institutions and our world to be aligned with those values expressed in our Principles; and
- l any other information which the Board of Trustees of the Association shall require.

Rule 3.8.2. Non-Segregation.

Each independent affiliate organization shall in all aspects of its work refrain from the practice of segregation based on race, ethnicity, gender, disability, affectional or sexual orientation, language, citizenship status, economic status, or national origin. This rule is not intended to preclude independent affiliate organizations designed to benefit groups organized to ensure their fuller participation in the larger society and to fulfill their unique spiritual needs.

Rule 3.8.3. Annual Contribution and Report.

Except in the year when it is admitted to independent affiliate status, each independent affiliate organization shall send the Association on or before April 30 (i) an annual report which shall include the data required by subsections (b), (c), (f), (g) and (h) of Rule 3.8.1 and any other information which the Board of Trustees shall require and (ii) the contribution contemplated by Rule 3.8.9. If an independent affiliate organization fails to comply with the provisions of this Rule, the Board of Trustees shall at its next regular meeting consider a finding of non-compliance and the termination of the independent affiliate status of such organization.

Rule 3.8.4. Report of Changes.

Each independent affiliate organization shall send the Association an attested copy of any changes in its charter, purposes, objectives, or bylaws as soon as any such changes are made and shall notify the Association immediately of any change in its tax exempt status.

Rule 3.8.5. Representation of Independent Affiliate Status.

No organization shall claim or represent in any manner that it is an independent affiliate with the Association until such status is voted by the Board of Trustees; and if and when any organization's independent affiliate status expires or it is terminated, that organization shall immediately cease to claim, represent or imply in any manner that it is affiliated with the Association.

Rule 3.8.6. Mailing List.

Each independent affiliate organization shall place the Association on its regular mailing list.

Rule 3.8.7. Additional Criteria for Admission.

Before granting independent affiliate status, the Board of Trustees shall determine that such affiliation is likely to be of substantial benefit to the Unitarian Universalist movement.

Rule 3.8.8. Yearly Grant of Independent Affiliate Status.

Independent affiliate status for all new or existing independent affiliate organizations shall be granted by the Board of Trustees for a designated one year period or portion thereof.

Rule 3.8.9. Independent Affiliate Contributions.

The contribution required to be submitted with an application for independent affiliate status and with an independent affiliate's annual report is \$100.

The UUA Board is excited about the possibilities presented in this new model. We welcome ideas and imaginings about our work together, grounded in our principles and in a spiritual practice of engagement and relationship.

November 30, 2006 – Deadline set by GA Planning Committee for requests for additional

program slots at GA 2007

February 2007 - Letter sent to Independent Affiliates for renewal of status for fiscal year

July 1, 2007-June 30, 2008 with deadline of April 30, 2007

- New criteria for Independent Affiliate status used in reviewing all applications

June 2007 – GA Planning Committee has determined that each Independent Affiliate will

be allotted one program slot for GA 2007

- Program slots should deal with substantive topic of interest to the movement and congregations rather than serve as recruitment or business meetings.
- Applications to present one or more additional programs may be submitted to the GA Planning Committee by December 1, 2006.

Please contact the GA Office or GA Planning Committee for questions regarding these resources.

Draft Checklist for Reviewing Independent Affiliate Applications

- ___ An attested copy of its charter, and copy of its purposes, objectives, and bylaws;
- ___ Number of members or member groups in the organization;
- ___ List of the principal officers with
 - dates of their term of service
 - personal mail addresses
 - congregational membership or congregation where settled
- ___ Principal mail address of the organization
- ___ Contribution contemplated by Rule 3.8.9;
- ___ Financial statement showing income and expenses for the latest fiscal year preceding the date of filing and showing assets, liabilities and net worth as of the end of such fiscal year;
- ___ Dates upon which its governing board met during the twelve months immediately preceding the date of filing; date/location of Annual Mtg.
- ___ Yearly reports of its governing body and its principal officers sent to members during the twelve months immediately preceding the date of filing;
- ___ Evidence that it enjoys tax exempt status or reason it does not
- ___ Statement outlining how its purpose, mission and structure models interdependence through engagement, coordination or collaboration of effort and resources with other groups or organizations
- ___ Statement outlining how the organization supports the transformation of institutions and our world to be aligned with those values expressed in our Principles:
 - The inherent worth and dignity of every person
 - Justice, equity and compassion in human relations
 - Acceptance of one another and encouragement to spiritual growth in our congregations
 - A free and responsible search for truth and meaning
 - The right of conscience and the use of the democratic process within our congregations and in society at large
 - The goal of world community with peace, liberty and justice for all
 - Respect for the interdependent web of all existence of which we are a part
- ___ The UUA Board of Trustees determines that the organization is likely to be of substantial benefit to the Unitarian Universalist movement.

UUA Bylaws (Section C-2.2) Purposes.

The Unitarian Universalist Association shall devote its resources to and exercise its corporate powers for religious, educational and humanitarian purposes. The primary purpose of the Association is to serve the needs of its member congregations, organize new congregations, extend and strengthen Unitarian Universalist institutions and implement its principals.