

TO ANY ORGANIZATION DESIRING TO MAKE APPLICATION  
FOR INDEPENDENT AFFILIATE STATUS  
WITH THE UNITARIAN UNIVERSALIST ASSOCIATION

Attached is a copy of the Rules and By-Laws of the Unitarian Universalist Association specifically pertaining to Independent Affiliate organizations and an application for Independent Affiliate status. Please examine these carefully. If you wish to apply for Independent Affiliate status, please execute and return the application, required attachments, and a check payable to the Unitarian Universalist Association in the amount of **\$100.00**.

Please return these forms and attachments and address any correspondence to:

Committee on Associate Members and Independent Affiliates  
Office of the Executive Vice President  
Unitarian Universalist Association  
25 Beacon Street  
Boston, MA 02108

**NOTE:** In order for the foregoing organization to be considered for independent affiliate status with the Unitarian Universalist Association, this application should be received by the Committee on Associate Members and Independent Affiliate Organizations, Unitarian Universalist Association, 25 Beacon Street, Boston, MA 02108, **on or before April 30 in order to qualify for the entitled programming slots at the General Assembly of the upcoming year according to Rule 3.8.3 in the UUA Bylaws.**

**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 1 (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.

## INSTRUCTIONS TO APPLICANT

In the following application and attachments, please be sure that the legal name of the organization is accurately set forth.

Do not include the word "The" unless it is part of the legal name.

Do not abbreviate the word "incorporated" or any other part of the name unless the abbreviation is part of the legal name.

Do not include the location of the organization as part of the name unless it is in fact part of the name.

If the organization is incorporated, give the state or other jurisdiction of incorporation and if it is known, the year of incorporation.

A vote of the organization authorizing the filing of this application is required. The vote must be certified by the clerk or secretary of the organization. A form of vote and an alternative form of vote are provided herewith. If the vote is a vote of the members of the organization, use the form labeled "CERTIFICATE OF VOTE." If the vote is a vote of the governing board or a committee of the organization, use the form labeled "ALTERNATIVE FORM OF CERTIFICATE VOTE."

~~If the Applicant is a church or other religious organization, please attach:~~

~~\_\_\_\_\_ (a) the name of the denomination or sect in which the Applicant has membership and if there is a minister his/her name, address and the name of each religious denomination or sect in which he is currently ordained or otherwise recognized; and~~

~~\_\_\_\_\_ (b) an attested copy of a letter or other instrument showing that each such denomination or sect has been notified of the application.~~

~~\_\_\_\_\_ (Note: Unitarian Universalist Association will not always require that other denominations or sects approve an application for independent affiliate status but reserves the right to do so.)~~

If any request or question is inapplicable to your organization, please provide an explanation as to why such request is inapplicable.

Applicants are reminded of the following provision of Rule 3.8.2 of the UUA Bylaws:

**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.

Independent Affiliate status is granted on a year-to-year basis, with period of independent affiliate status to coincide with the UUA fiscal year, which runs from **July 1 to June 30**.

**APPLICATION FOR INDEPENDENT AFFILIATE STATUS IN THE  
UNITARIAN UNIVERSALIST ASSOCIATION**

Pursuant to the vote, a copy of which appears below,

\_\_\_\_\_  
(exact legal name of organization)

located in

\_\_\_\_\_  
believing that its purposes and programs are in sympathy with the principles of the Unitarian Universalist Association, hereby applies for independent affiliate status in the Unitarian Universalist Association, and agrees to abide by rules of the Association relating to independent affiliate organizations which shall from time to time be in effect, and submits with this application an initial contribution of one hundred dollars (\$100.00).  
\_\_\_\_\_

\_\_\_\_\_  
(exact legal name of organization)

\_\_\_\_\_  
(Authorized Officer)

\_\_\_\_\_  
(date)

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**CERTIFICATE OF VOTE**

Date:\_\_\_\_\_

I, \_\_\_\_\_(secretary/clerk) of the above named organization,  
hereby certify that at a meeting of the members duly called and held on \_\_\_\_\_, at  
which a quorum was present, it was

VOTED:      That this organization apply for independent affiliate status in the  
Unitarian Universalist Association and that

Name:\_\_\_\_\_

its \_\_\_\_\_  
(a principal officer)

is hereby authorized to execute and present an application for such  
status.

\_\_\_\_\_  
(secretary/clerk)

## ALTERNATE FORM OF CERTIFICATE OF VOTE

Date: \_\_\_\_\_

I, \_\_\_\_\_, (secretary/clerk) of the above  
named organization certify that at a meeting of the \_\_\_\_\_  
\_\_\_\_\_ (exact name of governing board or committee) duly  
called and held on \_\_\_\_\_ at which a  
quorum was present, it was

VOTED: That this organization apply for independent affiliate status in the  
Unitarian Universalist Association and that

\_\_\_\_\_ (name)

its \_\_\_\_\_  
(a principal officer)

is hereby authorized to execute and present an application for  
such status

\_\_\_\_\_  
(secretary/clerk)

I further certify that under the (Constitution/Bylaws/Charter Documents) of this organization the  
governing board thereof referred to above is authorized in the name and behalf of this organization to  
take the kind of action described above.

\_\_\_\_\_  
(secretary/clerk)

**APPLICATION FOR INDEPENDENT AFFILIATE STATUS IN THE  
UNITARIAN UNIVERSALIST ASSOCIATION**

Name of Organization: \_\_\_\_\_

Principal mailing address of organization:

\_\_\_\_\_  
\_\_\_\_\_

Name, address, and telephone number of persons to be contacted by the UUA in respect to this report:

1. ~~Approximate~~ number of members or member groups as of date of this report? \_\_\_\_\_

2. Please attach list of:

- a. principal officers with personal mail address;
- b. trustees or directors of the organization.

4. Please list the dates during the twelve months preceding the date of this application the governing board of this organization met:

**5. Please attach the following to this application:**

- a. Attested copies of your organization's charter, constitution, or articles of incorporation, its bylaws and any official statement of purposes or objectives. The attested copy of the articles of incorporation should be obtained from the Secretary of State's office. The attestation affixed to the bylaws should be signed by the Secretary or Clerk of the organization, as she or he is the official with custody of such records. If your organization is not incorporated, an attestation signed by the Secretary or Clerk of the organization should be affixed your organization's constitution or other charter documents.

A form of attestation to be used with the bylaws, any official statement of purpose or objectives, and the charter documents of unincorporated organizations is attached here to.

- b. A Statement of Use as described by rule 3.8.1. (j):  
~~"a statement outlining the intended use of independent affiliate status, if granted, and the goals and objectives of the organization that will be served by such use."~~  
"a statement outlining how its purpose, mission and structure models interdependence through engagement, coordination or collaboration of effort and resources"
- c. A Statement of Benefit as described by rule 3.8.1. (k):  
~~"a statement outlining what advantage it is believed there would be to the Association and to the furtherance of the principles of the Association outlined in Bylaw Section C 2.2."~~

" a statement outlining how the organization supports the transformation of institutions and our world to be aligned with those values expressed in our Principles "

- d. A financial statement of this organization showing income and expenses for the latest fiscal year preceding the date of this application and showing assets, liabilities, and net worth as of the end of such fiscal year.
  - e. A copy of any yearly report of the governing board and principal officers of this organization which was sent to its members during the twelve months preceding the date of this application.
  - f. Evidence of the organization's tax exempt status under U.S. Internal Revenue Code Section 501(c) (3) or under similar laws of another county. If the applicant does not enjoy tax exempt status please state the reasons why.
6. Please attach to this application (if applicable):
- a. A copy of each and every 501 (c) 3, real estate tax, and sales tax exemption application filed during the year.
  - b. A copy of all newspaper and magazine advertisements advertising the organization's program.
  - c. A copy of all brochures or other descriptive material promoting the program of the organization.
  - d. A copy of any contract form by which the organization contracts with subscribers to its program
  - e. A copy of the prospectuses and brochures issued in conjunction with the fund raising of the organization or the issuance of bonds by it.
  - f. A sample of each type of stationery used by the organization in corresponding with third parties.
- ~~7. Please attach letters of recommendation to the Committee on Associate Members and Independent Affiliates from the following persons:~~
- ~~\* District President of the district in which the organization resides;~~
  - ~~\* District Executive of the district in which the organization resides;~~
  - ~~\* one UUA fellowshipped minister from the district.~~
8. Please put the UUA on the regular mailing list of this organization. Mail should be sent to: Committee on Associate Members and Independent Affiliate Organizations, Unitarian Universalist Association, 25 Beacon Street, Boston, MA 02108
9. Please attach a contribution of not less than \$100 for the fiscal year **July 1 through June 30**

## STATEMENT OF ATTESTING PERSON

On behalf of the undersigned organization, I understand that associate membership or independent affiliate status is granted by the UUA for one year periods only, and that when associate membership or independent affiliate status expires or is terminated, the undersigned organization shall **immediately** cease to claim, represent or imply in any manner that it is an associate member or independent affiliate organization (as the case may be) or in any other manner affiliated with the UUA.

I further acknowledge that for so long as the undersigned organization is an associate member or independent affiliate of the UUA, it may represent only that it is an associate member or independent affiliate, as the case may be, of the UUA, and shall under no circumstances represent that it is sponsored by or an agency, chapter, arm or branch of, or otherwise affiliated or connected with, the UUA. I further acknowledge that the undersigned organization shall have no authority to and shall not enter into any contract or agreement on behalf of the UUA or that purports to bind the UUA in any manner.

I further attest that I am a duly authorized officer of the undersigned organization and am duly authorized to execute and deliver this application or report, as the case may be, and to make the acknowledgements and representations contained herein on behalf of the organization, and that all statements made herein and in the attachments hereto are true and correct as of the date of this application or report, as the case may be.

Signature:\_\_\_\_\_

Name:\_\_\_\_\_

Name of Organization

\_\_\_\_\_

Official Position in Organization:

\_\_\_\_\_

Date:\_\_\_\_\_

## ATTESTATION

The undersigned, Clerk or Secretary of \_\_\_\_\_ (the "Organization")  
certifies and attests to the following:

1. that the document appended hereto is a true, correct, and complete copy of the Charter/Constitution/Bylaws of the Organization;
2. that said Charter/Constitution/Bylaws was/were duly adopted by the Organization; and
3. that said Charter/Constitution/Bylaws has/have not been amended, modified, or rescinded as of the date hereof.

\_\_\_\_\_  
Clerk/Secretary

Date: \_\_\_\_\_