

## MEMORANDUM

TO: Current Independent Affiliates of the Unitarian Universalist Association  
FROM: Nancy Lawrence, Assistant to the Executive Vice President  
RE: Annual Report  
DATE: December 21, 2006

This letter combines the mailing for UUA Directory information and for your annual renewal application and fee. We are currently working on the 2007 UUA Directory. Enclosed is a description of your organization as it appeared in the 2006 UUA Directory

Please note that, according to UUA Rule 3.8.2, each current Independent Affiliates is required to submit its annual report and contribution by **April 30**. The Statement of Attesting Person has also been revised and should be reviewed carefully.

### **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.

Descriptions are limited to 125 words, excluding your organization's name, address, telephone/FAX number and e-mail address. Please remember to include a contact person to help people direct their calls and correspondence. **The use of email is encouraged as an easy way to send in your write up for the directory and the web. This will ensure that the correct information will be used. It is also important to remember that more people will see your listing on our website than in the UUA directory and that at any time during the year you can send in changes as they come about. Please email your listing to [nlawrence@uua.org](mailto:nlawrence@uua.org) and mail in the rest of your application and payment to Nancy Lawrence at the address listed below.**

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

Nancy Lawrence, Assistant to Executive Vice President  
Office of the Executive Vice President  
Unitarian Universalist Association  
25 Beacon Street  
Boston, MA 02108  
[nlawrence@uua.org](mailto:nlawrence@uua.org)

Attached is a copy of the annual report for Independent Affiliates and a copy of the Rules of the Unitarian Universalist Association specially pertaining to Independent Affiliates.

## INSTRUCTIONS TO APPLICANT

In the attached report 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.

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.

According to UUA Rule 3.8.8 Independent Affiliate status is granted on a year-to-year basis. The period of independent affiliate status coincides with the UUA fiscal year, which runs from July 1 to June 30.

**Please attach a check for \$100 payable to the Unitarian Universalist Association for the fiscal year from July 1, 2005 through June 30, 2006.**

**ANNUAL REPORT FOR  
INDEPENDENT AFFILIATE ORGANIZATIONS IN THE  
UNITARIAN UNIVERSALIST ASSOCIATION**

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

Principal mailing address of organization and phone number:

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

Is this address used solely for this organization? Yes No  
If not, is this address a residence, church or other location (please specify)? \_\_\_\_\_

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

**NOTE:** In order for the foregoing organization to be considered for continuation of its independent affiliate status with the Unitarian Universalist Association, this report should be sent to the Office of the Executive Vice President, Unitarian Universalist Association, 25 Beacon Street, Boston, MA 02108, **on or before April 30**, according to Rule 3.8.2.

If this report is received after the deadline, the organization may lose independent affiliate status and be required to complete the entire application process.

1. ~~Approximate~~ Approximate number of members or member groups as of date of this report? \_\_\_\_\_
2. Please attach list of:
  - a. principal officers with ~~personal mail addresses~~ the names and addresses of UU congregations of which they are a member;
  - b. trustees or directors of the organization;
  - c. the terms of office for each officer, trustee or director
3. ~~Please list the dates during the twelve months preceding the date of this application the governing board of this organization met and~~ provide the date, location and agenda of the last annual meeting:
4. **Please attach the following to this application:**
  - a. 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.
  - b. 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.
  - c. If applicable, paperwork stating tax exempt status under U.S. Internal Revenue Code Section 501(c)(3).
5. 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.

6. Since the date of the last report filed by this organization, has there been any:

- a. Change in provisions of its charter, constitution, articles of incorporation, bylaws, or statement of its purposes or objectives?

Yes \_\_\_\_\_ No \_\_\_\_\_

If yes, attach copy of current text of such charter, constitution, articles of incorporation, bylaws or statement of purposes or objectives showing such changes.

- b. Change in tax exempt status under U.S. Internal Revenue Code Section 501(c) (3)?

Yes \_\_\_\_\_ No \_\_\_\_\_

If yes, attach statement indicating the substance of such change.

- ~~c. Change in intended use of associate member status or advantage of independent affiliate status to the Association [Rule 3.8.1. (j)(k)]?~~

~~\_\_\_\_\_ Yes \_\_\_\_\_ No \_\_\_\_\_~~

~~\_\_\_\_\_ If yes, attach statement indicating the substance of such change.~~

7. Is the UUA on the regular mailing list of this organization?

Yes \_\_\_\_\_ No \_\_\_\_\_

If no, please put the UUA on the regular mailing list of this organization. Mail should be sent to: Office of the Executive Vice President, Attention Nancy Lawrence, Unitarian Universalist Association, 25 Beacon Street, Boston, MA 02108

8. Please attach a contribution of not less than \$100 for the fiscal year running July 1, 2005 to June 30, 2006.

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: \_\_\_\_\_