

To: Congregational Leaders,
Independent Affiliate Organizations,
District Leadership,
UUA and District Staff

From: UUA Board of Trustees

Re: Criteria for Affiliate Status with the UUA

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.

Section C-3.8 of the Unitarian Universalist Association (UUA) Bylaws establishes the status of Independent Affiliate Organizations and provides that the UUA Board “shall adopt rules governing the requirements for admission to and retention of affiliated status” with the UUA.

There are currently fifty-two Independent Affiliate Organizations. They all can be said to have “purposes and intentions...in sympathy with the principles of the Association”; however, Independent Affiliate Organizations vary dramatically in terms of membership, focus, scope, resources, and relationship with our congregations.

It is a core value of Unitarian Universalism to value diversity. It is not enough for organizations or groups within our Association to mirror diverse beliefs and perspectives. We must collectively ensure that our institutions, structures and processes encourage and support behaviors and practices, not just beliefs, which are in alignment with our UU values.

To this end, 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.

The new criteria for Independent Affiliate status with the Unitarian Universalist Association will require a purpose, mission and structure that models interdependence through engagement, coordination or collaboration of effort and include a diversity of beliefs, perspectives, and experience.

The affiliate organization will have the goal of transforming institutions and our world to be aligned with those values expressed in our Principles.

While the UUA Board can neither “exercise control over nor assume responsibility for” any independent affiliate, we imagine that some examples of organizations or groups that would meet such criteria might be:

- >An organization which supports groups that connect historically marginalized persons within our faith community, providing a forum for dialogue on linked oppressions, a framework for effective coordination of resources, and a strategic approach to social justice work
- >An organization that encourages dialogue, research and scholarship between and among the different UU theological perspectives and religious groups
- >An organization that helps support, share resources and coordinate efforts for state legislative ministries
- >An organization that provides training resources and sets standards for UU camps and conference centers
- >An organization that supports research, scholarship and maintenance of archives for UU heritage and history

The Administration and the UUA Board will receive and process Independent Affiliate renewal applications for fiscal year July 1, 2006-June 30, 2007 (April 30, 2006 deadline) using current criteria for Independent Affiliate status. It is the intent of the UUA Board that language articulating the above new criteria be passed at the April 2006 Board meeting and that renewal applications for Independent Affiliate status that do not meet the April 30, 2006 deadline be reviewed based on the new criteria. All new applications for Independent Affiliate status will be directed to the Association Working Group of the Board for review in light of the new criteria as of June 2006.

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.

The UUA Board is aware that some groups may refer to their Independent Affiliate status in their charter or use their Independent Affiliate status in their application for legal status within their state. We invite such entities to contact the Board so that we may support their finding alternate and appropriate means of meeting these legal requirements.

It is important that organizations understand that, while the UUA Board may confer and terminate independent affiliate status, it is the General Assembly Planning Committee that has discretion over the allocation of General Assembly resources such as workshop space, advertising in the GA program, and exhibitor fees. For example, effective GA 2007, the Planning Committee has determined that each Independent Affiliate will be allotted one program slot. 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.

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.

Independent Affiliate Status Transition Timeline

February 2006 – Letter sent to Independent Affiliates for renewal of status for fiscal year July 1, 2006-June 30, 2007

- **Communication on transition to new criteria included**

April 30, 2006 – Deadline to submit required paperwork and application for renewal of Independent Affiliate status with the UUA for fiscal year July 1, 2006-June 30, 2007

- Existing requirements/criteria will be used to process these applications
- Those accepted may be eligible for space at GA2007 as determined by GA Planning Committee (see June 2007)
Please review as the GA Planning Committee has changed resource allocation and requirements for GA 2007
- All renewal applications for Independent Affiliate status posted after this date will be reviewed by the UUA Board against new criteria.
- The GA Planning committee is aware of this transition timeline and will determine in the coming year how space resources will be allocated for GA 2008.

April 2006 – UUA Board scheduled to pass language on new criteria for Independent Affiliate Status

- Motion(s) passed at the April 2006 UUA Board meeting will be reflected in minutes and posted on web as is current practice
- The GA Planning committee is aware of this transition timeline and will determine in the coming year how space resources will be allocated for GA 2008.

June 2006 – UUA Board workshop at GA on Independent Affiliate changes and transition

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.