

Fund for New Unitarian Universalist Communities Governing Document

September 2023

Name and Purpose

With the goal of investing in widening the circle of Unitarian Universalism expanding the capacity of our faith to offer spiritual community, the Unitarian Universalist Association (“UUA”) has created the Fund for New Unitarian Universalist Communities (the “Fund”). The Fund’s purpose is to support new spiritual communities which are covenanted with UU values and identity and dedicated to serving those who have been marginalized historically within our faith; this includes a broad understanding of networked virtual and physical communities and spaces (“communities”). It also supports the leaders who develop and guide these communities (“innovators”). This is in alignment with the recommendations from the 2020 Widening the Circle report from the UUA Commission on Institutional Change, which identified investment in new ways of serving the margins as a key aspect of reparations. The Fund shall be established as an account within the UU Common Endowment Fund (UUCEF).



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The Fund will be used for programs that provide grants and support for UU innovators and communities in order to carry out its purpose. Its programs and expenditures will be established and directed by a New UU Communities Fund Panel (“the Panel”) appointed by the UUA President. The UUA President will also appoint a Responsible Officer as a member of the UUA staff, who will be the convener of the Panel.

The Responsible Officer will propose structures for the Panel’s operation and guidelines for the Fund’s programs, to be approved by the Panel. Program guidelines must include an equitable and transparent process for individuals and communities can apply or receive support; a clear statement of intended goals, impacts and outcomes; and be grounded in deep relationship with the communities the programs seek to serve.

The Fund was established with the proceeds of a surplus sharing agreement with Beacon Press. Additional gifts to the Fund are welcome, and may be solicited by the UUA through coordination between the Responsible Officer and Stewardship and Development staff.

Guidelines for Granting and Distribution

The Panel or its successor shall have discretion to use the funds for its programs that provide for support to UU Innovators and communities. Examples of what these programs could include (but are not limited to):

- Access to expert mentors
- Cultivation of communities of mutual support
- Networking and coaching opportunities with leaders in the field;
- Support for developing and testing prototypes

- Infrastructure and networking to broaden the UUA's spiritual innovation ecosystem.
- Direct investment in new communities or models of community that have the potential to spread and grow.

In addition to programs it creates, the Panel may make additional grants, distributions or funding agreements to or with individuals, groups or partners that advance the goal of the Fund.

Fund Management Guidelines

The Fund will be classified as a UUA Board-restricted fund. Some money contained in the Fund may be subject to additional restrictions (such as geographic restrictions) to honor donor intent. The UUA's Finance Department is responsible for tracking additional restrictions on all money contained within the Fund to ensure that the UUA meets its legal and ethical obligations.

The Fund is a spendable fund (not an endowment). It is intended to exist in perpetuity, or as long as needed to carry out its purpose, but will have the goal of fully utilizing its resources within a 5-7 year rolling window, when practicable. The Panel will annually approve a five-year spending plan based on projected expenses and income, and may make distributions in line with that plan.

The Panel will operate under the direction of the UUA President or their designee, and have full authority to determine the expenditures of the Fund in line with this policy and who would qualify to receive grants or funding. The Responsible Officer must also ensure the Fund is complying with donor restrictions.

The UUA's administrative leadership may from time to time update this governing document as needed to align with the purposes of the Fund, or to clarify administrative aspects of the document.

If in the judgment of the UUA's administrative leadership, it is deemed impossible or impracticable to carry out the above-stated purposes, the Board shall determine a purpose as near as possible to the Fund's original intent.

Reporting

An annual report about the Fund expenditures and programs, will be produced by the appointed Responsible Officer in collaboration with Stewardship and Development.

