



UNITED NATIONS ASSOCIATION  
OF THE UNITED STATES OF AMERICA

# Chapter Handbook

**#USAforUN**

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**UNA★USA**

## **Our Mission**

**We are dedicated to educating, inspiring, and mobilizing Americans to support the principles and vital work of the United Nations and strengthen the UN system. UNA-USA encourages U.S. leadership to work constructively through the United Nations and to achieve the goals of the United Nations Charter. Through our chapters and programs, UNA-USA educates the American public about the invaluable work of the United Nations, raises funds and carries out local activities related to the United Nations, and recruits, engages, and retains members around the country.**

[www.unausa.org/chapters/chapter-resources](http://www.unausa.org/chapters/chapter-resources)

**WELCOME TO UNA-USA!**

Published 2019



**Dear UNA-USA Chapter Leader:  
Thank you very much for your  
dedicated and invaluable service  
as a leader of a UNA-USA chapter.**

Your work as a leader, educator, and advocate is essential as we work together to expand support for U.S. leadership in a more effective United Nations. You bring knowledge of your community, a spirit of service, commitment to the ideals of the United Nations, and volunteer leadership skills to our work. Thank you for these special contributions.

I hope that this handbook and other materials and services provided by the National Office will help you in your work. The handbook details how members can form an officially recognized chapter of UNA-USA and the requirements a chapter must follow to remain in good standing with UNA-USA. Our goal is to help you explain the United Nations system to your friends, neighbors, and leaders in your community. Whether it is through our education or membership programs, or in our advocacy efforts to change U.S. policy at the United Nations, we want to assist you in helping your community understand its stake in international engagement and cooperation.

Your ideas and suggestions are always welcome. We need to learn from your experiences and

hope to create an active forum where chapters can share information and seek each other's counsel. Please contact us directly or through your regional representative on the UNA-USA National Council to share these insights.

I look forward to meeting each of you in person when I visit your area or when you attend our annual Global Engagement and Global Leadership Summits.

May your time as a UNA-USA volunteer be rewarding and fulfilling. Your important contributions of time, experience, and talent are most appreciated, and we greatly enjoy working with you.

All the best,

Chris Whatley  
Executive Director, UNA-USA





**Section I:  
Who We Are**

## Our Story, Mission and Vision

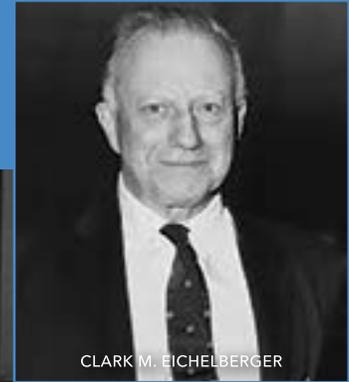
The United Nations Association of the United States of America (UNA-USA) is a grassroots movement of Americans dedicated to supporting US leadership at the United Nations. For over seventy five years, UNA-USA has worked to accomplish this goal through its national network of chapters, youth engagement, advocacy efforts, education programs, and public events. UNA-USA serves many constituencies, including community-based members and activists, affiliated organizations, business leaders, educators, and academic and foreign policy specialists as well as students and young professionals. UNA-USA's chapters, both in communities and on college campuses, are the driving force of UNA-USA's mission and play an indispensable role in safeguarding continued US support for the UN. Today UNA-USA is a program of the United Nations Foundation (UN Foundation), having merged with the foundation in 2010 to amplify UNA-USA's impact, and is also a member of the World Federation of United Nations Associations (WFUNA).



# Timeline

## 1943: UNA-USA Founding

The American Association for the United Nations, UNA-USA's predecessor organization, grew from the League of Nations Association in 1943. A group of prominent citizens, including the first executive director, Clark M. Eichelberger, activated the association to promote acceptance of the Dumbarton Oaks proposals in the late years of World War II. Among the association's early actions was a national tour by several U.S. representatives to spread the word and gain support for American adherence to the Dumbarton proposals, which led to the creation of the United Nations.

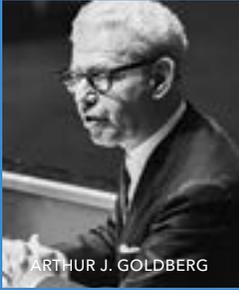


CLARK M. EICHELBERGER

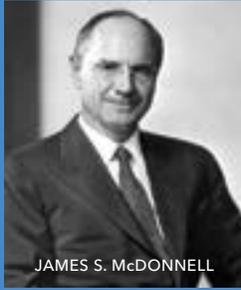


## 1951–1964: Eleanor Roosevelt, Champion for UNA-USA

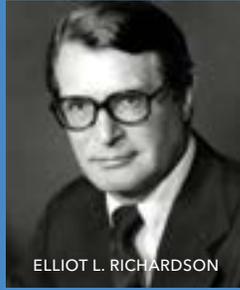
When First Lady Eleanor Roosevelt, a member of the association's board of directors, completed her term as U.S. representative to the UN General Assembly in late 1951, she walked into the association's offices and asked for something to do. Her offer was gratefully accepted, and in return an office was established at the association's headquarters. This was the quiet beginning of a major campaign in which Mrs. Roosevelt carried the message of the American Association for the United Nations across the country through personal appearances, recruitment speeches, and fundraising efforts that continued until her death in November 1962.



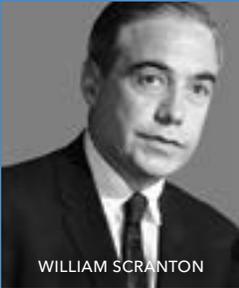
ARTHUR J. GOLDBERG



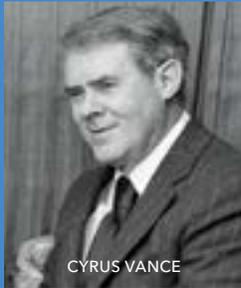
JAMES S. McDONNELL



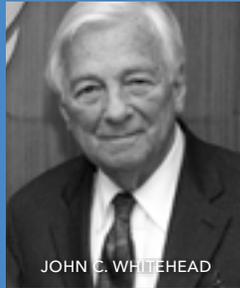
ELLIOT L. RICHARDSON



WILLIAM SCRANTON



CYRUS VANCE



JOHN C. WHITEHEAD

### 1964:

#### **UNA-USA and U.S. Committee for the United Nations**

In 1964, the association merged with the U.S. Committee for the United Nations, a group of 138 national organizations supporting the work of the UN, thereby creating the United Nations Association of the United States of America. Since then, several distinguished Americans have served in positions of leadership at UNA-USA. These include Arthur J. Goldberg, former associate justice of the U.S. Supreme Court and U.S. permanent representative to the United Nations; James S. McDonnell, former chairman of the McDonnell-Douglas Corporation; Elliot L. Richardson, former U.S. attorney general and U.S. representative at the UN Conference on the Law of the Sea; William Scranton, former governor of Pennsylvania and U.S. permanent representative to the United Nations; Cyrus Vance, former secretary of state; and John C. Whitehead, former deputy secretary of state.



TETA BANKS



KATHY CALVIN

### 2010:

#### **UNA-USA and United Nations Foundation**

In 2010, UNA-USA formed a strategic alliance with the United Nations Foundation. Under the new alliance UNA-USA continued as a robust membership program of the foundation. Together, UNA-USA and the UN Foundation pool their talents to increase public education and advocacy for the work of the United Nations.



## Partnerships

UNA-USA works closely with the United Nations Foundation and its sister organization, the Better World Campaign, to strengthen the U.S.-UN relationship. These partnerships continue UNA-USA's long bolstering American support for the United Nations.

### United Nations Foundation

The United Nations Foundation builds and implements public and private partnerships to address the world's most pressing problems and works to broaden support for the UN through advocacy and public outreach. Through campaigns and partnerships, the organization connects people, ideas, and resources to help the UN solve global problems. The campaigns reduce child mortality and improve health outcomes, empower women and girls, create a new energy future, secure peace and human rights, and promote technological innovation. As a chapter leader, you can take advantage of the many campaigns and initiatives of the UN Foundation to enhance your chapter's activities. **Please visit [unfoundation.org](http://unfoundation.org) for more information!**



### Better World Fund

The Better World Fund is the sister organization of the UN Foundation. The Better World Fund was established primarily to conduct domestic advocacy and partnership efforts that encourage a greater understanding of the UN, key UN causes, and the broad purposes of international cooperation through the United Nations. Through its "Better World Campaign," the Better World Fund has worked to strengthen the relationship between the United States and the UN by outreach, communication, and advocacy; to encourage U.S. leadership to enhance the UN's ability to carry out its invaluable international work on behalf of peace, progress, freedom, and justice; and to engage policy makers, the media, and the American public and increase awareness of and support for the UN. UNA-USA, through its community and campus chapters, is able to bring the Better World Fund's education and advocacy initiatives and messages to the public in the communities where they live.

## Key Initiatives



### Advocacy for the United Nations

Each year, UNA-USA chapters across the United States engage their elected officials in meaningful conversations about issues facing the United Nations. UNA-USA engages its diverse constituencies to build a better understanding of and support for the work of the United Nations. UNA-USA provides chapters and their members with a suite of resources, advocacy training, and a platform to voice their support for the United Nations. Chapters advocate throughout the year, but focus on three main engagement points: spring in-district meetings, Advocacy Day in Washington DC each summer, and summer or fall in-district meetings. UNA-USA's core advocacy ask is for the U.S. Congress to fully fund UN Peacekeeping and regular budget dues. Learn more about our key advocacy opportunities on page 39.



### Adopt-A-Future

Adopt-A-Future was launched in 2016 by the United Nations Association of the United States in partnership with USA for UNHCR—the only organization in the United States authorized by UNHCR to raise awareness and funds for the United Nations. It seeks to provide communities across the country with a chance to support quality education for refugee children and the efforts of UNHCR. UNA-USA Chapters who choose to participate in this key initiative raise funds to support education in UNHCR refugee camps.



### #Standup4HumanRights

UNA-USA collaborates closely with the Office of the United Nations High Commissioner for Human Rights (OHCHR) to equip advocates to stand up for human rights in the United States and around the world. In 2017-2018, UNA-USA partnered with OHCHR to celebrate the seventieth anniversary of the Universal Declaration of Human Rights across the United States, resulting in more than 100 events across the country. UNA-USA also works to connect grassroots advocates to the UN human rights system, including the UN Human Rights Council. Please contact the UNA-USA National Office if you are interested in broadening your chapter's engagement with human rights.



### UN Sustainable Development Goals

The Sustainable Development Goals, also known as the SDGs or Global Goals, were historically adopted by all 193 UN member nations in 2015. The seventeen goals are a to-do list for the world to achieve by 2030. The goals strive to end poverty, protect the planet, and ensure prosperity for all. The U.S. held consultations in fifty cities across the nation to get input from elected officials and business, faith-based, and civil society leaders. Online, over 73,000 Americans—including many UNA-USA members—engaged with the United Nations about the world they want to see in 2030. As a result of strong American engagement, the goals reflect longstanding bipartisan foreign policy and development priorities that Republican and Democratic Administrations and Congress have championed, including transparency in governance, improved education, and ending hunger and human trafficking.

The Sustainable Development Goals and the future they represent belong to everyone. We all have a stake in their success, which is why UNA-USA members across the country are taking action for the SDGs in their local communities!

## National Opportunities



### Global Engagement Summit

Each year in February, the Global Engagement Summit brings over 1,500 UN advocates together at the United Nations in New York City to participate in a day of dynamic and informative discussions on the most pressing issues facing the UN. This event unites world leaders with our nation's top grassroots change-makers to send a powerful message to UN leaders: The United States stands with the United Nations!

### Global Leadership Summit

At the Leadership Summit, hosted annually in Washington, DC, in mid-June, UNA-USA members meet with high-ranking U.S. government and UN officials, learn from global experts, gain invaluable tools to bring back home for chapter sustainability, and urge Congress to stand with the United Nations.



### United Nations Day

UNA-USA chapters across the nation hold events during the month of October to celebrate the anniversary of the United Nations (created on October 24, 1945). In addition, UN Day provides each chapter network with an opportunity to engage its local community partners with the vital work of the United Nations.

## Leadership Programs

### U.S. Youth Observer to the United Nations

Created to elevate youth voices in the global policy dialogue, the U.S. Youth Observer to the United Nations is a role appointed annually by the U.S. Department of State and UNA-USA. For a one-year term, an American between the ages of 18 and 25 is selected to engage young people in the United States in the work of the United Nations and international issues. As a correspondent between U.S. missions to the UN and American youth, the Youth Observer travels throughout the United States to discover the issues important to young Americans and participates in international organization meetings and youth conferences.

The most critical role of the Youth Observer is to engage young Americans in the work of the United Nations, empowering them to be active participants in dialogue on international issues and to have a global impact. The Youth Observer travels to high schools and colleges across the nation to build a connection between the UN and young Americans.



### Campus Fellows

The UNA-USA Campus Fellows program provides students with the opportunity to learn about global issues while developing their skills as UNA-USA leaders. We offer the Fellows tools to improve upon their own strengths as they help grow our national network of UN advocates. Campus Fellows provide peer-to-peer leadership and support the growth of campus chapters in their region.

### National Council

The National Council of UNA-USA operates as the elected volunteer leadership of the United Nations Association of the United States of America. It consists of representatives elected by and from the membership of each of eleven regions around the country. The National Council is the democratic voice of the UNA membership during UNA-USA policy and programming decision-making.



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## Section II: Joining Our Movement

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# Membership

## Membership Categories

The UNA-USA membership program consists of multiple membership categories at varying dues levels, as well as a complex management system. It is important that one understands the complete membership program before engaging prospective and current members.

Membership Category	Rate	Description
<b>Lifetime (one-time payment)</b>	\$1,000	Lifetime members do not have an expiration date.
<b>Patron</b>	\$500	One-year regular membership rate plus additional general donation to UNA-USA
<b>Sponsor</b>	\$100	One-year regular membership rate plus additional general donation to UNA-USA
<b>Regular</b>	\$50	Individual membership
<b>Introductory</b>	\$25	Individual who is either joining for the first time or rejoining after several years being away.
<b>Fixed Income</b>	\$25	Individuals who self-identify as being on a fixed income.
<b>Alpha Kappa Alpha (AKA)</b>	\$25	UNA-USA extends a special rate to all members of AKA
<b>Youth</b>	FREE	25 years or younger

## Membership Expiration Cycle

UNA-USA membership expiration dates are organized in quarterly, rather than monthly, cycles. For example, if someone joins on January 31, 2017, his/her membership will expire on March 31, 2018 (rather than January 31, 2018) since s/he was assigned to the Q1 cycle. Because this cycle can sometimes be difficult to understand and explain to members, please refer to the following guide.

Members are placed into one quarterly cycle, depending on when they join or renew.

Join/Renew	Membership Cycle
<b>January/February/March</b>	Q1 End Date: March 31 of the following year
<b>April/May/June</b>	Q2 End Date: June 30 of the following year
<b>July/August/September</b>	Q3 End Date: September 30 of the following year
<b>October/November/December</b>	Q4 End Date: December 31 of the following year

## Membership Terminology

Retaining UNA-USA members is a critical factor for success of UNA-USA. To this end, the National Office runs a comprehensive renewal program, consisting of direct mail and email communications designed to have members renew before their membership expires. Below are the key terms we use to describe the active or inactive status of a member.

**Current Member:** A paid member who has not gone beyond his/her four quarters of membership.

**Expiring Member:** In the last quarter of membership, a member is called an expiring member and receives renewal notices.

**Lapsed Member:** If an expiring member does not renew his/her membership after the fourth quarter, the member is considered lapsed for the next quarter.

**Dropped Member:** Following the lapsed cycle, if a member does not renew, s/he is dropped from membership.

## UNA Headquarters Renewal Membership Campaign

Timeline	Communication Type
<b>1 Month Prior to Quarterly Expiration</b>	Two renewal notices sent: one via direct mail, another via email.
<b>Month of Quarterly Expiration</b>	Three renewal notices sent: two via email, one via direct mail.
<b>1 Month After Lapsed</b>	Two renewal notices sent, one via direct mail and one via email, informing the expired member that s/he has been dropped but still has the opportunity to renew.
<b>3 Months After Lapsed</b>	One renewal notice sent via email, informing the expired member that s/he has been dropped but still has the opportunity to renew.



Members bring a broad range of backgrounds, experiences, and leadership skills to building the chapter and ensuring the succession of chapter board members and committee positions. Members also help provide the financial means to strengthen chapter activities and programs. Building chapter membership is key to creating a sustainable and truly effective organization.

### Membership Recruitment

Prospective members can be recruited in various ways. Here are a few groups to consider.

- Nonmember chapter program or event attendees
- Colleagues at internships and jobs
- Like-minded friends and family
- Acquaintances met at a UN, international, or related event
- Social media followers
- Lapsed UNA-USA members
- Contacts made at organization fairs
- Individual members of partner organizations



**There are many ways to engage prospective members. Use these examples to start.**

- Give personal testimony: in-person, via email, via social media, etc.—talk about it as much as possible.
- Send program invitations to your prospects.
- Create a “Bring a Guest” day for all members.
- Promote membership and events in related or partner organization communications (on their social media sites, in newsletters, etc.).
- Take advantage of speaking opportunities and promote membership.
- Provide membership information at ALL programs, such as UN Day, Human Rights Day, and International Women’s Day. And don’t forget to have a sign-in sheet so you can follow up with a membership ask.
- Include membership join links in all communications.
- Promote membership introductory rate when nonmembers attend a UNA chapter event.
- After events, post information in blogs, photos, etc., and include membership join link.
- Cross-promote events with similar local organizations.
- Ask those same organizations to post a link to your chapter’s website or to UNAUSA.org and to follow your chapter on social media.
- Ask area libraries, community centers, universities, cafés, and local businesses (such as fair trade partners) if they will display UNA-USA posters or post cards.
- Explore videotaping or live-streaming your events (using tools like Facebook Live) so more people can participate.

**Note: Membership forms are available upon request. All prospective members are encouraged to join UNA-USA and chapters online at [www.unausa.org/join](http://www.unausa.org/join).**

## Membership Engagement

**Once you have successfully recruited new members, make sure you acknowledge them and keep them engaged.**

- Assign new member champions or ambassadors.
- Greet and welcome new members at programs.
- Send new members welcome communications or call them.
- Publish new member names, titles, and organizations in chapter newsletters or on the chapter website.
- Invite new members to next chapter meeting.
- Publicly recognize new members at chapter meetings.

## Membership Retention

**And let’s not forget about your current membership. They too need attention.**

- Invite members to volunteer for committees, events, and programs.
- Recognize great work.
- Keep it fun—hold a drawing at each chapter meeting for special prizes.
- Survey your membership to stay on top of their needs and expectations.
- Encourage them to apply for special UNA member opportunities such as becoming a Commission on the Status of Women delegate or the U.S. Youth Observer to the UN.
- Nominate members for national awards given during the annual UNA Leadership Summit.
- Consider profiling members on your chapter’s website or on social media, or suggest they be featured in UNA-USA’s national newsletter, UNA Today.
- Also, occasionally reach out to your lapsed and expired members with action alerts, such as to join a group in-district meeting with your congressional representatives.
- Plan side activities for your group while attending UNA’s Global Engagement or Leadership Summits.

# Community Chapters

UNA-USA community chapters consist of active leaders and members from across the United States who are passionate about taking action for the United Nations in their local community! Any person can start a chapter, as long as they comply with following requirements.

## Core Requirements

### Membership

Maintain a chapter membership of at least twenty-five UNA-USA members in good standing. If the chapter needs help building its membership, please contact the National Office for assistance at [membership@unausa.org](mailto:membership@unausa.org). Please note that both paid members and free youth members affiliated with a community chapter count toward the twenty-five member minimum. (See page 14 for membership building and chapter activity ideas.)

### Leadership

**Have consistent leadership in place.** Chapters are required to elect and maintain a full roster of board members whenever possible, ensuring that the chapter has consistent leadership, including officer positions (president, treasurer, and secretary.) Leadership roles should be verified annually through the annual or semester report. (For further information see page 27: Chapter Board & Officers.)

### Annual Reports

**Submit an annual report.** Community chapters are required to complete an annual report before March 1 each year. Similarly, campus chapters are required to complete a semester report at the end of each academic semester. This report serves as an assessment of each chapter's health, providing invaluable information on finances, membership recruitment, and changes in chapter leadership. Reports will be evaluated by UNA's National Office, and further review may be encouraged if a chapter's capacity is in question.

## Required Chapter Activities

### United Nations Day

Host a UN Day event each year. UNA chapters are required to host an event commemorating the October 24th anniversary of the ratification of the United Nations Charter. This event should be open to all members and the community at large and should align with the theme determined by the National Office. Chapters are eligible to receive speakers, tool kits, and supplies for their events, provided they follow the proper reporting procedures.

### Board Meetings

Hold a minimum of four board meetings per year. Chapters should hold quarterly board meetings to manage chapter finances, review the chapter's business plan, and address the needs of their committees.

### Community Programs

Organize a minimum of two community-involved programs each year. These are events open to the whole community and should be publicized as widely as possible. Please provide timely notice to UNA-USA of all such events so that we can help you publicize them.

### Annual Membership Meeting

Conduct at least one annual membership meeting. Chapters are required to host at least one meeting to which all members are invited. At the annual meeting, the president reports on the chapter's activities and shares the business plan for the upcoming year. Furthermore, this meeting serves to elect new leaders to available positions. Depending on your chapter bylaws, the membership may approve financial reports or budgets or conduct other business as well. Please note that all proceedings should be recorded so that chapter members not in attendance can stay up to date. The annual meeting should be convened in the final quarter of each year or in a timely way at the beginning of the year so that the annual report listing leadership can be submitted before March 1.



## Tax Requirements

If the chapter is a subordinate organization as part of the Better World Fund (BWF) group exemption, it is expected to comply with all legal requirements imposed upon a subordinate organization included in a group tax exemption. The chapter must provide BWF in a timely fashion with any information reasonably requested to verify the chapter's continued eligibility for inclusion in BWF's group tax exemption, and thereby inclusion among UNA-USA's chapters. **(See Tax-exempt status under IRS Rules and Regulations below for basic filing instructions).**

The chapter must comply with all state and federal laws, rules, and regulations applicable to nonprofit organizations; maintain all permits, licenses, and other governmental approvals required in the chapter's territory; and make all required filings, such as annual corporate reports, fundraising reports, and tax filings that may affect the chapter's corporate or tax status, also paying and pay all applicable taxes, fees, and penalties. The 990 must be filed by May 15 to follow federal law and UNA-USA standards. Not filing your 990 for three consecutive years will have your tax exemption status automatically revoked by the IRS.



### Fun Fact #1

UNA-USA connects you with like-minded advocates who want to voice their support for U.S. engagement at the United Nations, with a current focus on making the Sustainable Development Goals (SDGs) a success.

The chapter must adhere to the chapter's bylaws. Any proposed amendments to your chapter's bylaws must be submitted to the National Office prior to adoption in order for the National Office to ensure that amendments are consistent with the affiliation agreement and the mission UNA-USA.

The chapter must comply with the terms and conditions of this handbook and the signed and approved affiliation agreement.

## Provisional Status

If an existing chapter fails to meet any of the above criteria, it will be given a one-year period to meet these requirements and steer its chapter into compliance. During this time, the chapter in question will operate under a provisional status, and a member of the National Office will supervise the chapter and offer guidance and support for achieving compliance. If a chapter fails to meet these requirements after a one-year period, the chapter will be suspended and its charter status will be revoked.

At a minimum, chapters are expected to comply with the following expectations: (a) have valid bylaws and an affiliation agreement in place, (b) file an annual 990 with the IRS, and (c) submit an annual report in a timely fashion. **Failure to comply with these primary requirements will result in withheld membership dues until full compliance is verified.**

## Operation as 501(c)(3) Organization

As exempt organizations under Section 501(c)(3) of the Internal Revenue Code, UNA-USA chapters are required to organize and operate exclusively for charitable, educational, and scientific purposes. To this end, UNA-USA chapters operate to further the mission of UNA-USA. Thus, UNA-USA authorizes chapters, subject to the terms of the chapter's affiliation agreement, to conduct educational, advocacy, and fundraising activities in the territory covered by its charter, as well as other activities that are consistent with UNA-USA's mission to develop and strengthen the relationship between the U.S. and the United Nations and to promote U.S. leadership to enhance international cooperation.

Whether independently exempt or included in BWF's group exemption, chapters may not take any action or assume any power or authority that would prevent it at any time from qualifying and continuing to qualify as a 501(c)(3) organization. In addition, the chapter may not engage in any activity, whether directly or indirectly, that would pose a substantial risk of loss of its tax-exempt qualification under section 501(c)(3).

For more information about complying with the requirements of Section 501(c)(3), please consult IRS publication 557, Tax Exempt Status for Your Organization, and the IRS publication Compliance Guide for 501(c)(3) Public Charities, both available at [www.irs.gov](http://www.irs.gov).

#### **Nonprofit fundraising registration requirement.**

Some chapters are required to register with their states as a charitable organization, and some are covered under BWF's registration. Please determine the regulations for your state before pursuing fundraising opportunities.

#### **Affiliation agreement.**

Whether a chapter is exempt from federal income taxation under section 501(c)(3) pursuant to its own determination letter from the IRS or is included in the BWF group exemption letter, the chapter is required to enter into an affiliation agreement with UNA-USA for the chapter to receive an official charter. Please review the terms and conditions of the affiliation agreement carefully, specifically the chapter's obligations thereunder, as failure to comply with the affiliation agreement may result in the suspension or termination of the chapter's charter.

#### **Chapter insurance.**

UNA-USA's master insurance policy provides liability insurance for chapter events if they are under BWF's group exemption and it is required by the venue. To obtain this coverage, the chapter must provide the National Office with the following information: (a) the legal name of the insured party from whom the chapter rents space or who the chapter has engaged for the event, that is, the party requesting the certificate; (b) a copy of the lease agreement or contract signed by the chapter for the rental or event; and (c) chapter event details such as audience, number of attendees, date, etc. Please send this information in an email to the membership team at [membership@unau-sa.org](mailto:membership@unau-sa.org).

UNA-USA does not provide insurance for individual volunteers or chapter board members. If deemed necessary for paid staff, chapters can opt to pay for their own board insurance.

Workers Compensation insurance must be carried by chapters with full- or part-time staff. They must provide the National Office with the name of the carrier and the policy number.

## **IRS Rules and Regulations**

#### **Tax-exempt status.**

As a program of the Better World Fund, UNA-USA receives its tax-exempt status from the Better World Fund, the UN Foundation's advocacy arm. This determination exempts UNA-USA from federal income tax on all forms of income derived from our exempt purposes. However, this tax-exempt status does not automatically extend to UNA-USA chapters. To be recognized as tax-exempt under Section 501(c)(3) of the Internal Revenue Code, UNA chapters must register their EIN as a subordinate organization of BWF, or file the necessary paperwork to apply for independent exemption. In either case, chapters are required to file a 990 form annually to maintain their tax-exemption; missed filings will result in a revocation of this status.

UNA chapters are required to have their fiscal year be the calendar year. IRS Form 990 is due on May 15th each year. Chapters that have their exemption revoked and are under UNA-USA's group exemption will be taken off and must then file with the IRS for their own individual exemption. Chapters not using the UNA-USA group exemption cannot receive event insurance coverage through UNA-USA.

Whether a chapter has obtained its own tax-exempt determination letter from the IRS or is included in BWF's group exemption, each UNA-USA chapter must comply with organizational, operating, and other legal requirements imposed upon a public charity under section 501(c)(3).



## Fun Fact #2



**UNA-USA is a network of over two hundred community and campus chapters throughout the country comprised of Americans who are passionate about the mission of the United Nations.**

### **Group exemption.**

BWF, the parent organization of UNA-USA, has a group tax exemption from the IRS that recognizes UNA-USA chapters as tax-exempt under Section 501(c)(3) since they are affiliated with BWF through UNA-USA. Thus, chapters that fall under the UNA-USA group 501(c)(3) tax-exempt designation and do not have their own individual designation have the ability to be included in BWF's group tax exemption. This eliminates the need for a chapter to apply for exemption individually. The BWF group exemption letter serves the same purpose as an individual exemption letter except that it applies to all eligible chapters and divisions. As subordinates, chapters included in BWF's group exemption do not receive individual exemption letters.

To qualify for a group exemption, the central organization and its subordinates must have a defined relationship. Subordinates must be: (a) affiliated with the central organization; (b) subject to the central organization's general supervision or control to ensure that each affiliate's operations are, on an ongoing basis, consistent with the central organization's exempt purpose; and (c) exempt under the same paragraph of IRS 501(c)(3), though not necessarily the paragraph under which the central organization is exempt. BWF therefore requires chapters to enter into an affiliation agreement with UNA-USA in order to establish this relationship and meet these requirements.

To comply with the IRS group exemption ruling, BWF is responsible for: (a) ensuring that the chapters included as subordinates continue to qualify for exemption; (b) verifying that any new chapters requesting inclusion in the group exemption letter are exempt; and (c) updating the IRS on an annual basis of new subordinates, subordinates to be withdrawn, and subordinates that have changed names or addresses.

BWF is also required to update the IRS with certain information on an annual basis; therefore, it requires that chapters submit information relevant to this obligation in the annual report that is due before March 1st. Required information includes: (a) information about changes in purpose, character, or method of operation of chapters; (b) lists of chapters included in the group exemption letter that have changed names or addresses during the year; (c) subordinates to be removed from the group exemption letter because they have ceased to exist, disaffiliated, or withdrawn their authorization to BWF; and (d) chapters to be added to the group exemption letter because they are newly organized or affiliated or have newly authorized BWF to include them.

### **Donor tax-deductible donations.**

Tax-deductible donations to chapters are included in the group exemption letter. Donors may obtain a copy of the letter from BWF if they are interested. Contributions to chapters covered by the group exemption ruling are deductible. Donors may verify with BWF whether the chapter is included in BWF's group ruling. Donors may rely upon BWF's verification with respect to deductibility of contributions to chapters covered in its group

exemption ruling.

## Annual IRS Reporting Requirements

### Federal tax.

All chapters must file an annual tax return with the IRS regardless of gross receipts amount. All returns must be filed by the fifteenth day of the fifth month after the close of the tax period. All chapters should follow the calendar year and must therefore file by May 15th.

### Which IRS forms to file.

All forms can be found online at [www.irs.gov](http://www.irs.gov). When filing, please include both the name of your chapter and that of the National Office (United Nations Association of the United States of America, Greater Boston Chapter). Please include the address of the National Office (1750 Pennsylvania Ave. NW, Suite 300, Washington, DC, 20006). This is to ensure that the National Office receives all IRS correspondence.

Please send to the membership team a copy of the filing receipt for whichever of the following forms is appropriate for your chapter.

**990-N:** Chapters with annual gross receipts of less than \$50,000 file Form 990-N.

**990-EZ:** Chapters with gross receipts of less than \$200,000 and total assets of less than \$500,000 may file Form 990-EZ. (These chapters may file Form 990 instead if they choose.)

**990:** Chapters with gross receipts of at least \$200,000 or total assets of at least \$500,000 must file Form 990.

If your chapter files Form 990-EZ or Form 990, please make sure that you complete the entire form. Incomplete forms result in additional paperwork or may cause a chapter to be deemed out of compliance.

### Failure to file.

Failure to file Form 990-N, 990-EZ, or 990 for three consecutive years results in revocation of the chapter's status as a tax-exempt subsidiary under UNA-USA's 501(c)(3) status.

### Employment tax returns.

As mentioned above, every chapter that pays wages to employees is responsible for withholding, depositing, paying, and reporting federal income tax, social security, Medicare (FICA), and federal unemployment tax (FUTA), unless the chapter(employer) is specifically exempt by law from those requirements or the taxes clearly do not apply.

### If Chapter does not file.

Failure to file Form 990 or 990-EZ results in assessment of fines in the amount of \$20 per day (up to the smaller of \$10,000 or 5% of the gross receipts of the organization for the year) until proper filing is completed.

### State tax filing.

Some states require nonprofits to file state tax forms. Most are due at the same time as IRS filings. Contact the national membership team if you are not sure about your state's requirements.

## Fun Fact #3



UNA-USA gives you an opportunity to participate in key advocacy events, such as meeting with elected leaders to increase knowledge of how the United Nations functions and how it makes the world a safer place for all.

## Advocacy and the IRS: Three Quick Facts



**1**

Often, the decision to fund or not to fund the United Nations rests on UNA-USA chapter advocacy and educational outreach.

Frequent contact with Members of Congress helps them better understand the important work of the UN.



**2**

Your national elected officials want to hear from you. While you may not always agree with them or even vote for them, they still represent you in Washington, DC. Those Members of Congress who are in support of issues and policies that are consistent with UNA-USA goals need to be thanked and asked to be champions for the cause.



**3**

Most chapters fall under the UNA-USA group 501 (c)(3) tax-exempt designation, while a few have their own 501 (c)(3) designation. It is important to note that all chapters have opportunities and limitations defined by the U.S. tax code, and chapters need to know what they can and cannot do with regard to advocacy. Organizations described in section 501(c)(3) of the IRS Code are commonly referred to as charitable organizations.

## IRS Guidance

In general, no organization may qualify for section 501(c)(3) status if a substantial part (usually interpreted as more than 5%) of its budget is attempting to influence legislation (commonly known as lobbying). An organization can opt to spend up to 20% for this purpose by filing IRS Form 5768 and electing to come under the provisions of a 1976 law. Education and research expenditures are not reported as lobbying. Lobbying is the expenditure of funds to advocate for specific legislation, and most UNA members' advocacy efforts do not expend corporate funds. A 501(c)(3) organization may engage in some lobbying, but too much lobbying activity risks loss of tax-exempt status that allows for tax deductible contributions.

Legislation includes action by Congress, any state legislature, any local council, or similar governing body, with respect to acts, bills, resolutions, or similar items (such as legislative confirmation of appointive office), or by the public through a referendum, ballot initiative, constitutional amendment, or similar procedure. It does not include actions by executive, judicial, or administrative bodies.

An organization is regarded as attempting to influence legislation if it contacts, or urges the public to contact, members or employees of a legislative body for the purpose of proposing, supporting, or opposing specific legislation, or if the organization advocates the adoption or rejection of specific legislation.

Organizations may, however, involve themselves in issues of public policy without the activity being considered as lobbying. For example, organizations may conduct educational meetings, prepare and distribute educational materials, or otherwise consider public policy issues in an educational manner without jeopardizing their tax-exempt status. They can even educate others about specific issues before Congress without having it considered lobbying if they do not refer to specific legislation, such as with a bill's identifying number.

Attempting to influence legislation means: (a) any attempt to influence any legislation through an effort to affect the opinions of the general public or any segment thereof (commonly known as grassroots lobbying); or (b) any attempt to influence any legislation through communication with any member or employee of a legislative body or with any government official or employee who may participate in the formulation of legislation (commonly known as direct lobbying). However, "attempting to influence legislation" does not include the following activities: (a) making available the results of nonpartisan analysis, study, or research; (b) examining and discussing broad social, economic, and similar problems; (c) providing technical advice or assistance (where the advice would otherwise constitute the influencing of legislation) to a governmental body or to a committee or other subdivision thereof in response to a written request by that body or subdivision; (d) appearing before, or communicating with, any legislative body about a possible decision of that body that might affect the existence of the organization, its powers and duties, its tax-exempt status, or the deduction of contributions to the organization; or (e) communicating with a government official or employee, other than a communication with a member or employee of a legislative body (when the communication would otherwise constitute the influencing of legislation) or a communication with the principal purpose of influencing legislation. Also excluded are communications between an organization and its bona fide members about legislation or proposed legislation of direct interest to the organization and the members, unless these communications directly encourage the members to attempt to influence specific legislation or directly encourage the members to urge nonmembers to attempt to influence legislation, as explained above. Charitable organizations may also encourage nonpartisan voter participation such as voter registration and get out the vote efforts.



## Fun Fact #4

UNA-USA provides a great informational platform through our monthly nationwide conference calls with UN experts on global health, gender equality, environmental affairs, and human rights.



## Chapter Financial Responsibilities

### Treasurer Activities

- An incoming chapter treasurer should, if possible, have at least one face-to-face meeting with his or her predecessor to learn past accounting practices. The new treasurer should use this meeting to assess the general financial health of the chapter and to learn about chapter programs and activities.
- The new treasurer should obtain the account numbers and statements for all bank accounts held by the chapter and should be added as a signer for these accounts. Each chapter should have at least two signers on its bank account.
- It is important for the treasurer to carefully track the chapter's income, expenses, and account balances.
- Chapters must adopt a fiscal year commencing on January 1 and ending on December 31.
- No chapter has the power to borrow money in the name of UNA-USA. UNA-USA is not responsible for the debts of the chapter.

### Record Keeping

Precise accounting records must be kept to ensure the most efficient use of chapter resources and to demonstrate to the chapter board the degree of success of a program. Accurate record keeping will also help determine future budgets by illustrating how much cost or benefit was associated with a program. Records should be kept in accounting journals, ledgers, or computer programs such as Word or Excel, or with online money management tools, such as Quicken, Mint, or QuickBooks. Any record-keeping system should show gross receipts, purchases, expenses, and assets. Each expense should be accompanied by either an invoice or receipt. A chapter financial report should be presented to the chapter board periodically (monthly or quarterly) and to the National Office when possible.

The treasurer or president of the chapter should retain custody for at least seven years of all financial records (bank statements, invoices, receipts and other proofs of expenses, and any correspondence with the IRS or other government authorities). More specific record retention periods vary depending on the types of records and returns.

### Permanent records.

Some records should be kept permanently. These include organizing documents, such as articles of incorporation and bylaws, with amendments, as well as board minutes.

### Employment tax records.

If an organization has employees, it must keep employment tax records for at least four years after the date the tax comes due or is paid, whichever is later.

### Records for non-tax purposes.

When records are no longer needed for tax purposes, an organization should keep them until they are no longer needed for non-tax purposes. For example, a grantor, insurance company, creditor, or state agency may require that records be kept longer than the IRS requires.

## Annual Budget

The treasurer works with the president, and executive director if there is one, to prepare the financial section of the chapter's annual report, which includes an annual budget. The budget should include an accurate projection of costs and revenue for the year, as well as line items for each chapter activity.

The preparation of an annual budget is an important opportunity for long-term strategic planning by the chapter board. Ideally, incoming and outgoing board members are involved in the process. All planning should be framed by measurable, agreed upon goals. Long-term planning will create a sense of common purpose and maximize time available for the important work of your chapter.

During chapter board meetings, the treasurer should report actual financials as they relate to the budget and ensure that all board members understand the report. Remember, UNA-USA staff is available for assistance.

## Chapter Bank Account

It is helpful to develop a check request form, so that anyone in your chapter requesting payment is required to indicate who the check should be written to, how much it is for, where it should be sent, and what its purpose is. This form should be signed by the chapter member submitting the request and approved by either the chapter president or treasurer. An invoice or receipt should be attached to the form and kept with the chapter's financial records.

## Fun Fact #5



UNA-USA provides you with a great advocacy network through other UN Foundation campaigns, such as Shot@Life, Nothing But Nets, GirlUp, and more!

## Tax/Employer Identification Number

Each chapter has its own Employer Identification Number (EIN) from the IRS. Each chapter must always use its own EIN. Under no circumstances should a chapter use the EIN of the National Office.

## Dues Sharing

UNA-USA chapters receive financial support from the UNA-USA National Office through a 50/50 membership dues sharing program. When a chapter member pays his or her membership dues, fifty percent is allocated to the affiliated chapter. Any payments that the chapter receives for membership dues MUST be sent to **UNA-USA, P.O. Box 96397, Washington, DC, 20090-6397**. Membership dues may not be deposited directly into the chapter bank account. They must be paid directly to UNA-USA.

Chapter dues payments may not be deposited into the chapter bank account until they are logged by the National Office. Chapter dues payments are distributed to chapters on a quarterly basis. Chapters receive fifty percent of chapter membership dues from the National Office. Each chapter must confirm its address with

UNA-USA each quarter prior to check distribution by responding to a quarterly cash report email sent by a member of the UNA-USA team. Chapters must deposit these quarterly checks within that same year. Once the new year begins, accounts at the National Office are closed for the previous year and new checks for previous years cannot be generated, nor can funds from previous years be rolled over into the new year. Additional questions can be sent to [membership@unausa.org](mailto:membership@unausa.org). Chapter presidents, treasurers, and membership chairs receive a monthly update from the membership team and a quarterly cash report.

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## Campus Chapters

**UNA-USA campus chapters consist of young and vibrant advocates for the United Nations in colleges and universities across the United States! Any student can start a chapter—we welcome people from community colleges, small schools, large universities, and more!**

### Core Requirements

Becoming an official campus chapter means that your group will be recognized by UNA-USA, the national organization. Benefits to recognition include eligibility for funding and grants, access to members-only events, like the Global Engagement Summit at the UN and the Global Leadership Summit, and a network of like-minded students to help you reach your goals. Leading an official chapter puts you among the ranks of other impactful young Americans advocating for the United Nations and its causes.

#### Here are five steps to get you started:

- Have at least ten students activate their free UNA-USA membership at [www.unausa.org/join/youth](http://www.unausa.org/join/youth).
- Recruit a team of three chapter leaders to help you organize.
- Host three events a semester on your campus that highlight the importance of the United Nations.
- Establish an online presence by creating a Facebook page or website.
- Submit your end of semester reports in December and May.

Some chapters may be required to make an annual contribution to their regional division, if one exists, so that it can continue to support the chapter's activities and membership development. Please check with your division, if applicable, to determine any annual contributions. Membership dues for at-large division members follow the same split as chapters membership dues. The National Office is available to facilitate individual plans for different divisions if requested.



### Required Activities

Chapter leaders are responsible for recruiting members on campus at the beginning of the fall and spring semesters, either independently as a chapter or at the school's annual activities fair or open house.

All campus chapters must hold at least three events or activities per semester (a total of six per year). This may include a fundraiser, a public event, or an issue-based discussion, but among the six should be a United Nations Day event or activity on or around October 24th, and at least one other international UN celebration day, such as International Women's Day (March 8th), or Human Rights Day (December 10th).

We also highly encourage our campus chapters to participate in the following opportunities at least once each academic year!

- At least one advocacy-related initiative, such as a meeting at a Congressional office in-district or on Capitol Hill or contacting your local legislator or Member of Congress.
- A UN-related service project, such as volunteering to support resettled refugees in your community for UNA-USA's refugee initiative, fundraising to support Nothing But Nets, or planning a campus sustainability project for Earth Day.

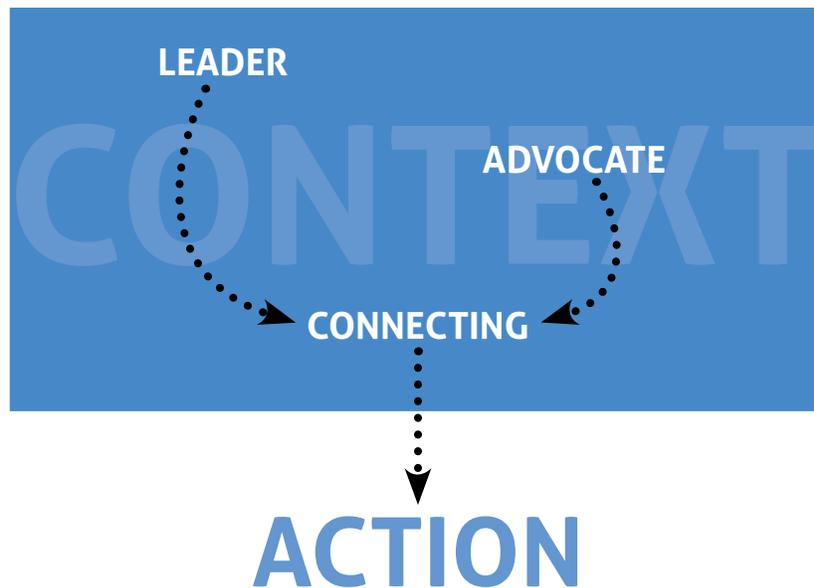


**Section III:  
Creating Strong  
Foundations**

# Effective Leadership Strategies: Lead to Inspire!

## UNA-USA Chapter Leadership

Being a UNA-USA chapter leader is an extremely rewarding experience for you and your surrounding community. Your contributions as a leader, educator, and advocate are essential as we work together to expand support for U.S. leadership in a more effective United Nations. You bring knowledge of your community, a spirit of service, commitment to the ideals of the United Nations, and volunteer leadership skills to our work. As you continue your journey as UNA-USA chapter leader, we have highlighted a few effective leadership strategies to help you along the way. These strategies will be useful for your chapter's development, growth, and retention.



### Setting an Agenda

If you are an incoming officer, setting a leadership agenda for your chapter will ensure that there is a common focus and consensus between everyone on your board. More importantly, setting an agenda will help your overall chapter continue the momentum it has set in the past. This agenda should tackle questions such as:

- What are three areas of opportunity that you think the chapter can work on?
- What are three areas of success that you think your chapter is doing well?
- What are your top three goals as a chapter leader?

## Leadership Planning

### Recruitment

As a chapter leader, you should always seek to recruit creative, hardworking leaders to advocate for the United Nations in chapters across the United States. We offer a range of resources to help chapter leaders develop their skills and provide a network of like-minded individuals to help raise American voices in support of strong U.S. leadership at the UN.

### Transition

A successful leadership transition may be one of the biggest challenges UNA chapters face. As a chapter leader, it is not enough to build and run an effective chapter; one of your responsibilities is to leave your organization in the hands of community leaders who will continue to build on your agenda. You should always be in the process of seeking, identifying, recruiting, training, and installing the next team of leaders. Additionally, be sure to communicate with the National Office so that we can send all necessary chapter leadership information to the appropriate individuals.

### Recognition

Last but not least, don't forget to show your appreciation to your members, volunteers, and former chapter leaders! A simple thank you can go a long way. Here are some helpful tips for developing a chapter recognition system:

- Send thank you letters or cards
- Plan for awards, certificates, and gifts
- Have a Volunteer of the Month
- Offer letters of recommendation
- Have a social Volunteer Night

## General Leadership Structure

### Required Chapter Leadership

An organizing group consists of at least three UNA-USA members in good standing who have expressed intent to form a new UNA-USA chapter. Besides a chapter president, you should recruit a treasurer and secretary. Below are indicated job descriptions for each of these volunteer positions.

#### President

The president facilitates the work of the chapter, creating the chapter's annual business plan, and is responsible for adjusting programmatic goals in collaboration with the board members. The president presides at all chapter meetings; appoints all chapter committee chairs with the consent and approval of the officers; presents the report covering the activities of the chapter in the previous year at the chapter's annual membership meeting; enforces chapter guidelines; ensures that all books and records are properly kept and that all meetings are appropriately called; and ensures completion of all required reporting (such as submission of the annual or semester reports and annual budgets to UNA-USA).

#### Secretary

The secretary serves all notices required by the UNA Chapter Handbook. The secretary also records accurate minutes of all meetings of the chapter (which should include all election results and assignments to specific duties); works with the president to prepare the chapter's annual or semester reports; and performs other duties of a secretary.

#### Treasurer

The treasurer is responsible for maintaining all financial records for the chapter and provides oversight for all banking, events, and fundraising activities. The treasurer ensures financial compliance with all applicable laws and provides information to the president and the UNA-USA National Office membership team on all financial matters of the chapter. S/he works with the president to prepare the financial section of the chapter's annual or semester reports. The Treasurer also works with the Finance and Budget Committee if the chapter has established such a committee.

## Additional Leadership Opportunities

In addition to the three required officers, the board may appoint additional officers or board positions.

### President Elect

If a chapter chooses to vote for a President Elect, this person serves as a future president in training. S/he observes all workings of the chapter, assists with special projects such as strategic planning, preparing the annual reports, and research. Chapters should have strong succession plans to ensure stability during leadership changes.

### Vice President(s)

Chapters may choose to elect one or more vice presidents to help the president with the work of the chapter or to assume committee leadership. In the latter case, a senior vice president is identified to serve during the president's absence or removal, or following his/her resignation.

### \*Membership Chair

Chapters may elect or appoint a membership chair or VP who is responsible for managing the chapter's membership records and developing a membership growth strategy.

Specific responsibilities include contacting current, lapsed, and prospective members as well as welcoming new members. Each chapter should have a membership committee to assist the chair with membership development. The membership chair may also be called the vice president for membership. *\*This position is required for all UNA-USA community chapters.*

### Advocacy Chair

Chapters may elect or appoint an advocacy chair or VP to serve as a liaison between the chapter and other entities such as the Advocacy Committee of the National Council and the UNA-USA National Office. The advocacy chair is responsible for promoting participation in the e-action alert system and advocacy events, such as the Day on Capitol Hill and in-district advocacy activities. The chair should develop and maintain personal relationships with local congressional representatives and/or their relevant staff members through letters, telephone calls, emails, and personal visits and stay up to date about their positions on UN-related issues. The advocacy chair may also be called the vice president for advocacy.



### Young Professionals Chair

Community chapters may elect or appoint a young professionals chair or VP who is responsible for managing and developing a successful Young Professionals or university alumni program that encourages members to become engaged with the United Nations through professional development and other opportunities. UNA-USA Young Professionals are individuals who are 26 through 39 years of age.

### Education Chair

Chapters may nominate an education chair who liaises with the UNA-USA Education Committee. The education chair can also develop strategies to introduce Model UN mini-simulations to local middle and high schools and organize educational programs for partners, members, and prospective members.

### Communications Chair

Chapters may elect or appoint a communications chair or VP who will oversee all aspects of communication with the public and the chapter membership. This includes maintaining an online and social media presence as well as regular communication with the chapter's membership and the general public. The communications chair is encouraged to work alongside the president and membership chair to assist with retention efforts, in addition to highlighting the efforts of the chapter throughout the year and regularly updating the National Office about

upcoming advocacy activities, programs, and events. S/he may also want to recruit team members dedicated to external or internal communications. This will help with editing and proofreading of all social media posts and other external communications. Please remember that UNA-USA is nonpartisan.

**Chapters are also encouraged to form topical committees led by the above committee chairs. Responsibilities of chapter committees may include planning events, maintaining membership engagement, and providing updates to the general leadership board.**

## Removal from Office

### Voluntary

An officer or board member may announce his/ her resignation at any board of directors meeting or in writing to the board. The resignation becomes effective after the following board of directors meeting or at a later date indicated by the person resigning.

### Involuntary

If an officer or board member is to be removed from office involuntarily, it shall be by a two-thirds affirmative vote at a board of directors meeting with a majority of the board members present. All members of the board shall receive at least ten days' notice prior to the meeting at which the removal vote occurs.

## Code of Conduct

All Affiliated Persons of the United Nations Association of the United States ("UNA-USA") are subject to the terms of the Code of Conduct for the duration of their affiliation with UNA-USA.

Failure to comply with these terms could result in removal of the Affiliated Person from a leadership role with UNA-USA and/or from his or her further affiliation with UNA-USA.



## Join a UNA Affinity Group



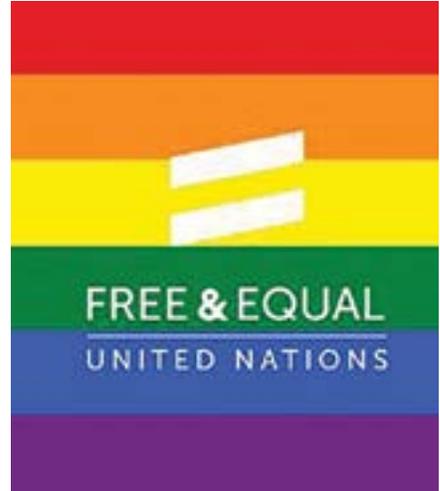
### UNA Young Professionals

As active members of UNA-USA, UNA Young Professionals are committed to fostering international cooperation and community education on international affairs. UNA Young Professionals groups work locally throughout the United States to promote and implement education projects, advocate for a strong U.S.-UN relationship, and participate in professional development opportunities. To get involved, work through your local community chapters to plan and participate in events for young professionals in your area. Chapters are encouraged to appoint a representative to this group.



### UNA Women

Following the path of past UNA-USA visionaries such as Eleanor Roosevelt, UNA Women takes direction from the interests and passions of current UNA-USA members, who convene in person and virtually, to advance important and timely issues related to women and girls. UNA Women advocates for UN programs that further women's rights and empowerment nationally and internationally. Participation in UNA Women is open to any current UNA-USA member. Chapters are encouraged to appoint a representative to this group.



### UNA LGBTI

UNA LGBTI takes direction from the interests and passions of current UNA-USA members, who convene in person and virtually, to advance important and timely issues related to LGBTI rights. UNA LGBTI advocates for UN programs that further LGBTI rights and empowerment nationally and internationally. Participation in UNA LGBTI is open to any current UNA-USA member. Chapters are encouraged to appoint a representative to this group.

# Meeting Tips

## Before

**Plan regular meetings.** Make sure chapter members always know when and where your meetings take place. Keep it consistent so that new members can join.

**Create an agenda.** Trust us. It will make your meeting run much more smoothly.

**Put people in charge.** Members want to feel like they are making a real contribution to the chapter. Assign members to tasks or committees and hold them accountable for their responsibilities during meetings.

## During

**Take attendance.** Use a chapter sign-up sheet to get email addresses of everyone who comes to a chapter meeting.

**Plan.** Events take a long time to plan. Your chapter goals can help you create a calendar of activities. Then, use an event checklist to keep you on track.

**Next Steps.** Always end the meeting with specific actions chapter members should take before the next meeting.

## After

**Send meeting notes.** Make sure these minutes get sent to members afterward, especially those who missed the meeting.

**Get feedback.** Create an occasional poll or quiz for members. Open up a new thread and share what your chapter discussed on social media or the UNA Forum.

**Reminders.** Send quick reminders for events and upcoming meetings. A group text or email thread will do the trick.



# The Importance of Partnerships

## Reasons for Partnerships

Any type of UNA-USA programming can be made more effective through teamwork and collaboration. Working alongside other community organizations who are sympathetic to our cause allows us to cast a wider net and build lasting relationships. Ultimately this will allow you to increase membership, raise awareness, split costs and share materials, and reach a wider audience.

## Types of Partnerships

Discovering mutual causes to rally around will help you find an ideal partner for an event or campaign. Depending on your audience, you may want to consider extending invitations to an organization in one of the following categories.

- Service or social action groups (e.g., Amnesty International, Circle K, UNICEF)
- Academic institutions
- Cultural or international organizations
- Private sector and small businesses
- Other UNA-USA chapters in your area!



## Tips for Effective Partnerships

The United Nations touches a breadth of issues related to health, security, science, politics, and more. The sky is the limit for collaboration! Here are four tips for forming and maintaining partnerships with outside organizations.

**Engage with organizations on social media.** If an organization is promoting sustainability in your community, recognize them! Social media is the primary platform for recognition and marketing. By helping to market an outside organization via the web, they will continue to promote sustainability and influence other organizations to do the same.

**Utilize presentation opportunities.** Invite local organizations to your next event or meeting and give them the opportunity to speak on behalf of their organization. Have them explain how they are helping to achieve the UN Sustainable Development Goals and how they can potentially work with UNA members on future community projects.

**Invite organizations to be a chapter sponsor.** Not only will this opportunity help facilitate a stronger partnership with your prospective organization, it will give the partner a chance to promote the organization's sustainable agenda to the public. In addition, these organizations can help provide your chapter with essential tools and resources.

**Maintain a strong relationship.** Always follow up with the organization and update about your chapter activities. Give them the opportunity to see that you are interested in working with them on a long-term basis. In addition, take the time and effort to publicly thank them for the support they give to your chapter.



**Section IV:  
Making the  
Difference**

# Fundraising

## Best Strategies

During the initial meeting of the year or school term, chapter leaders should begin to brainstorm on a fundraising strategy. To do so, leaders should ensure that they have a general idea of intended events and projects. Once these goals are set, fundraising targets can be developed. Consider these strategies to kick start a successful year for fundraising.

**Create a budget.** How much is needed to achieve chapter goals? Determine the amount needed to execute events, projects, etc.

**Establish a fundraising goal.** Decide upon a realistic amount that the chapter can reasonably raise and that has the capacity to support chapter endeavors. What expenses are anticipated, and might any unforeseen expenses arise?

**Seek sponsorship opportunities.** Be proactive in reaching out to potential sponsors. Consider what connections you share. Events with large crowds have particular appeal to external funders.

## Forms of Sponsorship

**University sponsorship** establishes a base of funding at the start of the year. Apply for funding from student government or academic departments for specific initiatives.

**Event sponsorship** can include working with businesses to promote their brands at your event and in return receiving funding for your chapter.

**Individual sponsorship** involves donations from community or partner organizations.

Did you know that the Adopt-a-Future Campaign is a signature fundraising opportunity for our chapters to participate in? Learn more by visiting [unusa.org](http://unusa.org)



# Event Planning 101

## How to Plan an Event

Holding events is a crucial part of being a chapter, as they provide education and empowerment. The planning process can be daunting and stressful, however using a timeline as a reference can help ensure an event is on track for success.

## Event Timeline: Guide for a Successful Event

### 9–12 months before event

- **Identify needs.** Consider the intended audience, whether it is an advocacy or fundraising initiative, the size of event, and the influence of event.
- **Develop event goals and objectives.** Evaluate the purpose of event, the desired outcomes, and the desired attendee learning experience.
- **Determine a location.** Book a venue that best fits the size and needs of the audience.

### 6–9 months before event

- **Finalize your focus.** Reach out to the UNA-USA National Office regarding your event in order to receive necessary tools and materials.
- **Organize the details.** Establish a budget for all aspects of event, curate a to-do list, and determine speaker needs. Prioritize your goals and timeline.

### 3–6 months before event

- **Build partnerships.** Consider what connections members or leaders have, as well as like-minded organizations that will draw attention to your event. Clearly state objectives and how the chapter's goals relate to them to potential partners.

### 1–6 months before event

- **Publicize.** Promote the event locally and on social media platforms.

### 1–3 months before event

- **Formulate the event program.** Determine what will occur at the event and who will participate.
- **Organize the details.** Create an event handout for participants and confirm that all A/V and media equipment is functioning properly.

### 1–2 weeks after event

- **Follow up.** Thank all of the event attendees and participants and offer more ways in which they can be involved.
- **Showcase the event.** Post pictures and descriptions on social media and consider reaching out to local media sources.



**Event Ideas**  
Film screening  
Fundraising dinner or gala  
Community speaker opportunity  
Community service project  
International festival

# Communication & Branding



## Social Media Tips and Tricks

Utilizing social media can be very useful for spreading chapter information across a campus or a community. Here are some staple social media guidelines that can help boost chapter recognition across platforms.

**Post often.** If someone sees a chapter has not posted in weeks or months, s/he might assume the organization is no longer active. Let the community know what the chapter is doing without posting too often. Posting about two to three times a week is a typically a good amount.

**Use photos.** Be sure to designate someone at events and meetings to capture pictures of activities, as they serve as great social media content.

**Engage with followers.** Ensure all active members are following the chapter accounts and support posts with likes and comments. Encourage students to post on their accounts about what they are doing with the chapter and tag the chapter, so leaders can reply to their posts. Did a member mention the chapter in a tweet during an event? Tweet them back and thank them for attending!

**Get fun and creative.** Stay up-to-date on the latest social media trends and features and take advantage of them. Post Instagram stories.

## UNA-USA Logo

The new UNA-USA logo is a modern reinterpretation of the original mark that represents the strong relationship between the United Nations and the United States and blends the goals and missions of the two organizations.



## Logo Types

**Primary logo.** The primary logo includes the logo type and the mark, with variations that accommodate the short- and long-form versions of the name.

**Chapter logo.** The chapter logo should be used in all instances that space and layout allow. Chapter names are attached to both short- and long-form versions of the logo. Chapter names must always be confined within the width of the UNA-USA name. If longer, it drops to a second line and the text is centered vertically with the logo.

**Social media logo.** Social media usage (e.g., profile pictures) calls for the stand-alone mark to be sized and placed within shapes specific to the platform.



## Correct Logo Usage

The laurel and American flag mark can stand alone. However, please apply this only on an as-needed basis.

## Incorrect Logo Usage

In order to maintain brand consistency, the logo and all elements should remain intact.

**Do not separate logo elements.**

**Do not remix, delete, or introduce new design elements.**

**Do not distort the logo in any way.**

**Do not place the logo against a background that would result in low contrast.**

**Do not swap the two blues.**

**Do not introduce new colors within the logo (see Color Application below).**

## Correct Color Application

The primary and secondary color palettes, described below under UNA-USA Colors, are applied to the primary logo to celebrate occasions (Independence Day or Pride month, for example) or highlight issue areas (like women's rights or climate change). The National Office will provide these logos during key moments throughout the year.

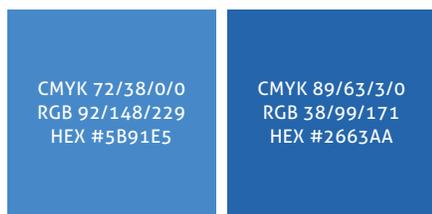


## Official UNA-USA Fonts

Aller is the primary typeface. Aller bold, specifically, is the only typeface employed for the logo. It should also be applied to headlines and callouts online and in print collateral.

Avenir is the secondary typeface. While not used in the logo, it should be used in web and print materials for long-form text, like body copy.

## Official UNA-USA Colors



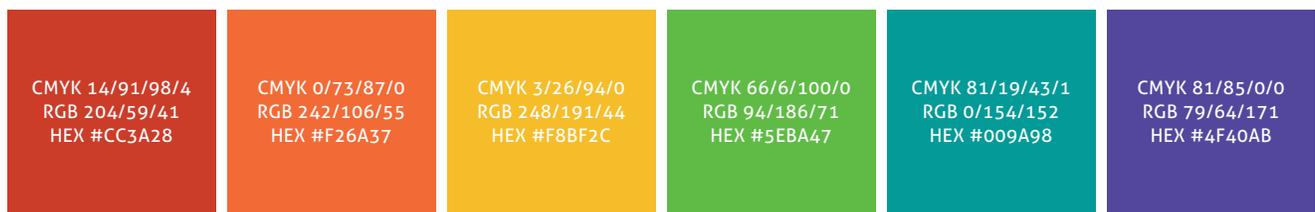
**The primary colors palette** comes from the logo itself.

There are two different blues:

UN Blue (lighter) and UNA-USA Blue (darker).

**Secondary colors** should be used as accent colors or in special cases for specific issues.

This color palette is bright and diverse, reflecting UNA-USA's audience and reach.





## UNA Forum

The UNA Forum serves to connect the national network of chapter leaders.

Through the UNA Forum we hope to build an online community of chapter leaders as we discuss accomplishments, challenges, and opportunities to continue supporting the United Nations locally. This platform allows you to make posts, build polls, upload documents, and have conversations with chapter leaders nationwide. To obtain access, please submit an officer update form to the UNA-USA National Office.

## UNA-USA Online Store

Through the UNA-USA online store, chapters can purchase a variety of promotional items. Visit the store at [www.unausastore.org](http://www.unausastore.org). The following items are available:

- SDG pop-up backdrop
- SDG placards
- UNA-USA t-shirts
- United Nations Day event swag kit
- Three large 24 x 36' posters with SDGs and the United Nations Day theme
- 200 SDG stickers
- 200 SDG buttons
- 200 "Join UNA" promotional cards
- 100 UNA-USA pens

Ask us about these additional items:

- UN Free & Equal Campaign pins and stickers
- Universal Declaration of Human Rights booklets
- UN Charter booklets

# Being an Advocate for the United Nations

## Make Your Voice Heard

Are you ready to advocate with your chapter? Chapter leaders and members should collectively determine what specific issues they would like to act upon and what advocacy methods are best for them. There are a range of methods that may be employed by chapters to voice their input to public officials.

### Email and calls

The UNA-USA website makes it easy to contact congressional members! To send emails, simply visit the UNA Advocacy page and select from a range of issues to send a pre-drafted message detailing those concerns. Having chapter members call the offices of their Members of Congress is also a great way to voice concerns. To find a list of the names and phone numbers of Members of Congress at both Washington, DC, offices and in-district offices, be sure to visit [www.usa.gov/elected-officials](http://www.usa.gov/elected-officials).

### Tweets

The UNA-USA Advocacy page also posts sample tweets to copy and paste. Be sure to encourage chapter members to use this site and follow @UNAUSA on social media to learn how to take action on their digital platform.

## Engagement with Members of Congress

Meeting in person with your Members of Congress or their staffs is one of the best ways to effectively communicate and advocate for the United Nations. In-person meetings make your advocacy more personal and allow you to build a relationship with office staff, which can help with future advocacy. Setting up and attending a meeting with your member of Congress can seem overwhelming and intimidating, but remember that your elected officials want to hear from their constituents and learn what issues are important to them! Most importantly, UNA-USA is here to support you with guidance and resources that will help you execute the meeting successfully.

### Getting started

**Who and where.** Not sure who your Member of Congress is or the best place to meet with them? Not a problem. You can find out by visiting [www.house.gov](http://www.house.gov) and [www.senate.gov](http://www.senate.gov). Each Member of Congress has an office in Washington, DC, and (typically) several local offices located throughout the district or state.

**Reach out to UNA-USA.** We want to know about your advocacy efforts and help make the process as simple as possible. Contact us and we will provide you with helpful tips and information, such as talking points and suggestions for the best times to meet with your congressperson.



### Setting up your meeting

**Contact the scheduler.** The best way to set up a meeting is to go through the process set up by each congressional office. You can check on the member's website for instructions to request a meeting, or you can call the office directly and ask the receptionist how to set up a constituent meeting. Once you know how to make a request, be ready to provide the following information:

- Who you are and where you are from
- The issue you would like to address during the meeting
- Your desire to meet with the congressperson or a relevant staffer
- Your contact information

**Follow up.** If you don't hear back after several days, you can reach out again by email or phone. Remember to be polite and refer to your first communication and reasons for wanting to meet with the congressperson.

**Confirm the meeting.** Once your meeting has been scheduled, call a few days before the meeting to confirm that the appointment is still on the books.

### Before the meeting

**Review the UNA-USA talking points and briefing book.** Use the UNA-USA talking points and briefing book to update yourself about the issues you will be discussing. These meetings should be brief, no more than fifteen to twenty minutes. You probably will not be able to talk about all the UN issues you care about, but that's okay! At the end of the meeting, the staff member or congressperson should remember one thing: I have a constituent that supports the UN and wants me to support the UN too.

**Decide who is speaking and when.** The individual who lives in the congressperson's district or state should be the person that speaks first. If more than one person falls into this category, discuss among your group who might be a good candidate to get the conversation started. From there, decide the order in which members of your group should speak. Know your elected officials. Do some quick online research to learn more about your Members of Congress, including what committees they serve on and past remarks they have made about the UN. In addition, checking their Twitter, Facebook, and Instagram accounts lets you see what issues are most recently on their minds.





### During the Meeting

**Remember to have fun!** This isn't a test. These meetings are a unique and exciting opportunity to share your passion with your elected officials. Your goal is not to "win" the meeting.

**Introduce yourself and UNA-USA.** When you meet the congressperson or staff member, remember to introduce yourself, provide your name, and give them a little background on UNA.

**Talk about what your chapter does.** Members of Congress are interested in what goes on in their districts and states. Let them know there is a robust constituency of UN supporters where they live.

**Tell them why you care, and share a personal UN story.** You may have an interesting first-person account of how the United Nations has positively affected your life or the life of someone you know. Feel free to share this in your meeting.

**Make the ask, and don't try to cover too much ground.** After going through the talking points, make the ask: "I'm asking you to fully fund our UN Peacekeeping and regular budget dues this year." At the end of the meeting, the staffer or Member of Congress should remember at least one thing: I have a constituent that supports the UN and wants me to support the UN too.

**Take a photo to commemorate your visit.** Pictures with a Member of Congress or congressional staff person are a great way to remember your visit. You can post them on Twitter, Instagram, or Facebook after the meeting, allowing you to publicly thank the office for visiting with you. Please ask before taking any photos.

### After the Meeting

Send a thank you email. Send a brief email to the person you met with thanking them for their time and sending them a link to the briefing book. Follow up with UNA-USA. We want to know how the meeting went and if there are any follow-up actions we can help you with.

### Things Not to Do

**Don't become confrontational or mention your party affiliation.** UNA-USA is a nonpartisan organization, and we try to work with all Members of Congress to build support for the United Nations. Please do not reveal your party affiliation or discuss who you did or didn't vote for, as this may risk alienating an office and weaken the effectiveness of your meeting.



**Don't make up an answer.** It's okay not to know. If you find yourself in your meeting and you're not sure of an answer to a question, it's okay. Just let the person know that either you or someone from the UNA-USA National Office will get back to them with an answer to their question shortly.

**Don't record audio or video during your meeting.** Congressional offices typically do not want their meetings with constituents recorded or videotaped. Avoid negatively affecting your meeting before it starts by not bringing audio or video recorders.

### Talking Points

#### **Cheat Sheet: What to Say and How to Say It**

The United Nations needs YOUR support now more than ever. Use these helpful points to share your story and ask your senators and representatives to ensure that the UN has the resources it needs to continue its lifesaving work around the world.

#### ***Remember to do Your Homework!***

Prior to the meeting, it is vital for all participants to be well versed in the value of the work of the United Nations, and, if applicable, the specific issue to be discussed.

#### **Our Story**

I'm here to tell you that I support the vital work of the United Nations. I want to share with you why I believe funding the United Nations is so important to our nation's leadership.

#### **Our Core Ask**

The United Nations is on the front lines of some of the world's biggest challenges and crises. The United Nations' efforts to promote peace and security help make the United States stronger and safer.

I am asking you to fully fund our UN Peacekeeping and regular budget dues and maintain U.S. support for vital UN agencies and programs.

I'm not alone in this request. Eighty-eight percent of American voters believe it is important for the U.S. to maintain an active role in the United Nations. [source: Polling conducted by Better World Campaign, 2017]



## Section V: Frequently Asked Questions

#USAforUN

## General Information

### Is UNA-USA part of the United Nations?

While we support the vital work of the United Nations, **UNA-USA is not part of the UN or the UN system.** We are a campaign of the United Nations Foundation.

### How can I start a UNA chapter if there is not one in my area?

**You must become a UNA-USA member** before you can begin the process of starting a new chapter. Please submit a chapter interest form on the UNA-USA website.

### What do I need to sign up for UNFCU?

UNA-USA has partnered with the United Nations Federal Credit Union so that UNA members are eligible to sign up for UNFCU banking. Please provide a copy of your membership card or your latest membership payment confirmation email to your UNFCU representative. **For more information about UNA-USA benefits with UNFCU, visit [www.unfcu.org/UNA-USA](http://www.unfcu.org/UNA-USA).**

### What sort of programming does UNA-USA do for Model UN?

UNA-USA is dedicated to empowering young Americans with tools and experiences that prepare them to be the next generation of global leaders. As part of our mission to inform, inspire, and mobilize the American people to support the ideals and vital work of the United Nations, our network of chapters has encouraged students in our communities to participate in Model UN programming. Today UNA-USA, along with its network of local chapters, operates Model UN Conferences in Boston, DC, Houston, Tampa, NYC, and other communities. **Contact your local UNA chapter to determine its level of involvement in Model UN.**

### Can UNA-USA help me get access to UN meetings and conferences?

UNA-USA is dedicated to connecting Americans to the UN, including during major meetings such as the Commission on the Status of Women, UN Human Rights Council, and High-Level Political Forum. **Become a member to receive more information about these unique opportunities.**

## Becoming a Member

### Can I join UNA-USA if I live abroad?

UNA-USA membership is for people who are committed to advocating to U.S. congressional representatives and officials the importance of the involvement of the United States with the United Nations. **UNA-USA members must be U.S. residents or citizens with a U.S. address.**

### What is youth membership?

Youth membership is free for those who are 25 years of age and younger. Youth members are typically part of campus chapters, but are encouraged to select a local community chapter as well. You must sign up online and provide your name, email, address, and date of birth in order to qualify.

### How can I pay for my UNA-USA membership?

You can pay for UNA-USA Membership online at [www.unausa.org/join](http://www.unausa.org/join). If you pay for membership by cash or check, please mail it along with the membership form to BWF/UNA-USA, PO Box 96397, Washington, DC, 20090-6397.

### When does membership expire?

For free youth members, **membership expires when you turn 26.** After that time, you must renew as a paid member. Otherwise, membership expires the following year at the end of the quarter in which it was last obtained or renewed (e.g. membership starting on April 10, 2018 will expire on June 20, 2019).

### Can I set up an automatic renewal?

Our online membership forms allows for automatic renewals. If you chose this option, you will be charged on the same date each year.

### Can I join if there is not a chapter by me?

**Yes!** Members who have no local chapter, or wish not to be affiliated with one, can indicate "National Member" when they join. You will still receive all the information sent to other members from the National Office.

### Can I be a member of more than one chapter?

Only students who also have free youth membership can be part of more than one chapter: one campus chapter and one community chapter. Paid members can only be part of one chapter.



### Can my organization get membership?

**There is only individual membership.** Our suggestion would be to identify one person in your organization to have UNA-USA membership so that you can be kept in the loop about what UNA-USA is doing nationally and locally!

## Membership Issues

### The website is not accepting my payment. What can I do?

Our website has security measures in place to prevent fraud. Transactions can be declined for a number of reasons; the reason your card is rejected is highlighted in red. If your transaction fails, there will be a hold charge placed on your account. This charge should disappear in five to ten business days. **If you run into an issue with your credit card, please contact [membership@unausa.org](mailto:membership@unausa.org).**

### I did not get a confirmation e-mail after registering as a member. What should I do?

If you registered or renewed online, **you should receive an email receipt at the email address that you provided upon registration.** The email is the only confirmation sent to a member. Please wait for six to eight weeks to receive a membership card in the mail at the address provided upon registration.

If you registered or renewed by sending a check, please wait six to eight weeks for the check to be processed and a membership card to be sent to the address provided.

### My credit card has been charged multiple times. What should I do?

**Please avoid clicking the submission button multiple times** as it can lead to multiple submissions. If your transaction fails there will be a hold charge placed on your account. This charge should disappear in five to ten business days. If your hold charges do not disappear after this time please email [membership@unausa.org](mailto:membership@unausa.org). Please note that we cannot refund hold charges as those are funds that have been rejected by our payment system and thus have not been received by UNA-USA. We can only refund charges if payment has been received by UNA-USA.

### I received a renewal notice, but I have already renewed. What does this mean?

You may have received this notice if you renewed your membership after our mailing list was generated, or you may have signed up in the past under a different email or address, creating a separate account. **If you are concerned that we did not receive your renewal or wish to check if we have multiple accounts for you, please email [membership@unausa.org](mailto:membership@unausa.org).**

### My membership card has not yet arrived. When can I expect it?

Please allow six to eight weeks from the time you registered or renewed for your membership card to arrive.

### How can I get my membership ID number?

If your membership ID number has not arrived in the mail during the six to eight week period, you can **receive your membership ID number by emailing the National Office at [membership@unausa.org](mailto:membership@unausa.org).**

### I would like to change my membership information. How can I do this?

Your membership ID number reflects the information that you provided to sign up for membership. We are happy to make changes such as name, address, email, phone number, chapter affiliation, etc. **Please email your corrections to [membership@unausa.org](mailto:membership@unausa.org).** To expedite the process, please include in your email the information that is on your current account (email, street address, state, etc.) so we can identify the correct account.



# About the United Nations

## Why is the United Nations important?

In our increasingly interconnected world, national challenges often require international solutions. Age-old calamities like war and disease have no respect for borders or boundaries, and their effects can spread rapidly. **The UN provides a platform for the world to discuss and debate these common problems and more: problems like human trafficking, environmental degradation, weapons proliferation, and international terrorism.** The UN, it is often said, is not a perfect institution, but it serves a near-perfect purpose: to **promote global cooperation** to address the world's most pressing challenges.

## Who funds the United Nations?

Are you a member of a club, or maybe a special interest organization? If you are, chances are that you have to pay dues to the organization of which you are a member. That is how the UN works too. **Each of the 193 member states makes an annual contribution to fund the work of the UN, based on its gross national income.** These general budget funds finance the General Assembly and the Security Council, among many other essential UN bodies and missions. Although the United States is the United Nations' largest single contributor, its regular budget dues are capped at twenty-two percent, meaning the rest of the world is responsible for sharing over two-thirds of the UN's total financial burden.

## What is UN Peacekeeping?

The UN Peacekeeping budget is separate from the regular budget. You've most likely heard about peacekeeping in the news. Peacekeepers are the soldiers in blue helmets working in places like Sudan and the Congo. These service members come from all over the world—places like Jordan, India, and Nigeria—to **help bring stability and normalcy to countries destroyed by war and political turmoil.** The United Nations funds its peacekeeping budget with assessments on member states similar to those made for the regular budget, but with greater discounts for less wealthy nations.

With **fourteen missions currently in operation and a deployed military totaling 120,000**, it is easy to see why peacekeeping is the UN's largest line item expenditure. Despite the price tag, however, **peacekeeping operations are proven to be cost effective and, most importantly, reduce the need for America to send its armed forces into**

**harm's way.** To put it in perspective, a UN peacekeeper costs about \$15,000 per year, with the United States covering just a share of that. On the other hand, we spend around \$2 million per year on every U.S. soldier serving in Afghanistan right now.

## How does the United States pay its UN dues?

**Congress and the president are responsible for making sure America pays both its UN Peacekeeping and regular dues on time and in full.** The process begins with the president's annual budget request, which is then taken up separately by the House and Senate appropriations committees. At the end of the day, the Senate's bill and the House's bill have to be identical to go to the president for his signature and final approval. It is a process that is not always fluid and is prone to deadlock. The United Nations is a political institution and UN funding is often a subject of political debate. By working through the UN and paying our dues, however, America is able to reinforce its core foreign, economic, and humanitarian priorities around the world—and that is a sound investment.

## How does the United Nations promote human rights?

The United States has a long history of supporting UN human rights mechanisms, beginning with our deep involvement in founding the United Nations. Former First Lady Eleanor Roosevelt led the effort to develop the Universal Declaration of Human Rights, which was the first document in human history to spell out the basic civil, political, economic, and social rights that all human beings should enjoy. **The UN works to defend and promote human rights through three key mechanisms within the UN system: human rights treaties, the Office of the High Commissioner for Human Rights, and the Human Rights Council.**

## What does the future hold for the United Nations?

In 2015, the United Nations came together to do something extraordinary: to develop a new international framework for tackling some of the planet's most complex challenges. Known as the Sustainable Development Goals (or SDGs), **the framework sets forward 17 goals to be achieved by 2030.**



**Designed by Karen Marino**  
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